NATIONAL CERTIFICATES (VOCATIONAL)

ASSESSMENT GUIDELINES

CONTACT CENTRE OPERATIONS
NQF Level 4

September 2007
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SECTION A: PURPOSE OF THE SUBJECT ASSESSMENT GUIDELINES

This document provides the lecturer with guidelines to develop and implement a coherent, integrated assessment system for Contact Centre Operations in the National Certificates (Vocational). It must be read with the National Policy Regarding Further Education and Training Programmes: Approval of the Documents, Policy for the National Certificates (Vocational) Qualifications at Levels 2 to 4 on the National Qualifications Framework (NQF). This assessment guideline will be used for National Qualifications Framework Levels 2-4.

This document explains the requirements for the internal and external subject assessment. The lecturer must use this document with the Subject Guidelines: Contact Centre Operations to prepare for and deliver Contact Centre Operations. Lecturers should use a variety of resources and apply a range of assessment skills in the setting, marking and recording of assessment tasks.

SECTION B: ASSESSMENT IN THE NATIONAL CERTIFICATES (VOCATIONAL)

1 ASSESSMENT IN THE NATIONAL CERTIFICATES (VOCATIONAL)

Assessment in the National Certificates (Vocational) is underpinned by the objectives of the National Qualifications Framework (NQF). These objectives are to:

- Create an integrated national framework for learning achievements.
- Facilitate access to and progression within education, training and career paths.
- Enhance the quality of education and training.
- Redress unfair discrimination and past imbalances and thereby accelerate employment opportunities.
- Contribute to the holistic development of the student by addressing:
  - social adjustment and responsibility;
  - moral accountability and ethical work orientation;
  - economic participation; and
  - nation-building.

The principles that drive these objectives are:

- **Integration**
  To adopt a unified approach to education and training that will strengthen the human resources development capacity of the nation.

- **Relevance**
  To be dynamic and responsive to national development needs.

- **Credibility**
  To demonstrate national and international value and recognition of qualification and acquired competencies and skills.

- **Coherence**
  To work within a consistent framework of principles and certification.

- **Flexibility**
  To allow for creativity and resourcefulness when achieving Learning Outcomes, to cater for different learning styles and use a range of assessment methods, instruments and techniques.

- **Participation**
  To enable stakeholders to participate in setting standards and co-ordinating the achievement of the qualification.

- **Access**
  To address barriers to learning at each level to facilitate students’ progress.
• **Progression**  
To ensure that the qualification framework permits individuals to move through the levels of the national qualification via different, appropriate combinations of the components of the delivery system.

• **Portability**  
To enable students to transfer credits of qualifications from one learning institution and/or employer to another institution or employer.

• **Articulation**  
To allow for vertical and horizontal mobility in the education system when accredited pre-requisites have been successfully completed.

• **Recognition of Prior Learning**  
To grant credits for a unit of learning following an assessment or if a student possesses the capabilities specified in the outcomes statement.

• **Validity of assessments**  
To ensure assessment covers a broad range of knowledge, skills, values and attitudes (SKVAs) needed to demonstrate applied competency. This is achieved through:
  - clearly stating the outcome to be assessed;
  - selecting the appropriate or suitable evidence;
  - matching the evidence with a compatible or appropriate method of assessment; and
  - selecting and constructing an instrument(s) of assessment.

• **Reliability**  
To assure assessment practices are consistent so that the same result or judgment is arrived at if the assessment is replicated in the same context. This demands consistency in the interpretation of evidence; therefore, careful monitoring of assessment is vital.

• **Fairness and transparency**  
To verify that no assessment process or method(s) hinders or unfairly advantages any student. The following could constitute unfairness in assessment:
  - Inequality of opportunities, resources or teaching and learning approaches
  - Bias based on ethnicity, race, gender, age, disability or social class
  - Lack of clarity regarding Learning Outcome being assessed
  - Comparison of students’ work with other students, based on learning styles and language

• **Practicability and cost-effectiveness**  
To integrate assessment practices within an outcomes-based education and training system and strive for cost and time-effective assessment.

2 ASSESSMENT FRAMEWORK FOR VOCATIONAL QUALIFICATIONS

The assessment structure for the National Certificates (Vocational) qualification is as follows:

2.1 **Internal continuous assessment (ICASS)**  
Knowledge, skills values, and attitudes (SKVAs) are assessed throughout the year using assessment instruments such as projects, tests, assignments, investigations, role-play and case studies. The internal continuous assessment (ICASS) practical component is undertaken in a real workplace, a workshop or a “Structured Environment”. This component is moderated internally and quality assured externally by Umalusi. All internal continuous assessment (ICASS) evidence is kept in a Portfolio of Evidence (PoE) and must be readily available for monitoring, moderation and verification purposes.

2.2 **External summative assessment (ESASS)**  
The external summative assessment is either a single or a set of written papers set to the requirements of the Subject Learning Outcomes. The Department of Education administers the theoretical component according to relevant assessment policies.
A compulsory component of external summative assessment (ESASS) is the integrated summative assessment task (ISAT). This assessment task draws on the students’ cumulative learning throughout the year. The task requires integrated application of competence and is executed under strict assessment conditions. The task should take place in a simulated or “Structured Environment”. The integrated summative assessment task (ISAT) is the most significant test of students’ ability to apply acquired knowledge.

The integrated assessment approach allows students to be assessed in more than one subject with the same integrated summative assessment task (ISAT).

External summative assessments will be conducted annually between October and December, with provision made for supplementary sittings.

3 MODERATION OF ASSESSMENT

3.1 Internal moderation
Assessment must be moderated according to the internal moderation policy of the Further Education and Training (FET) college. Internal college moderation is a continuous process. The moderator's involvement starts with the planning of assessment methods and instruments and follows with continuous collaboration with and support to the assessors. Internal moderation creates common understanding of Assessment Standards and maintains these across vocational programmes.

3.2 External moderation
External moderation is conducted by the Department of Education, Umalusi and, where relevant, an Education and Training Quality Assurance (ETQA) body according to South African Qualifications Authority (SAQA) and Umalusi standards and requirements.

The external moderator:

- monitors and evaluates the standard of all summative assessments;
- maintains standards by exercising appropriate influence and control over assessors;
- ensures that proper procedures are followed;
- ensures summative integrated assessments are correctly administered;
- observes a minimum sample of ten (10) to twenty-five (25) percent of summative assessments;
- gives written feedback to the relevant quality assuror; and
- moderates in case of a dispute between an assessor and a student.

Policy on inclusive education requires that assessment procedures be customised for students who experience barriers to learning, and supported to enable these students to achieve their maximum potential.

4 PERIOD OF VALIDITY OF INTERNAL CONTINUOUS ASSESSMENT (ICASS)

The period of validity of the internal continuous assessment mark is determined by the National Policy on the Conduct, Administration and Management of the Assessment of the National Certificates (Vocational).

The internal continuous assessment (ICASS) must be re-submitted with each examination enrolment for which it constitutes a component.

5 ASSESSOR REQUIREMENTS

Assessors must be subject specialists and should ideally be declared competent against the standards set by the ETDP SETA. If the lecturer conducting the assessments has not been declared a competent assessor, an assessor who has been declared competent may be appointed to oversee the assessment process to ensure the quality and integrity of assessments.

6 TYPES OF ASSESSMENT

Assessment benefits the student and the lecturer. It informs students about their progress and helps lecturers make informed decisions at different stages of the learning process. Depending on the intended purpose, different types of assessment can be used.
6.1 Baseline assessment
At the beginning of a level or learning experience, baseline assessment establishes the knowledge, skills, values and attitudes (SKVAs) that students bring to the classroom. This knowledge assists lecturers to plan learning programmes and learning activities.

6.2 Diagnostic assessment
This assessment diagnoses the nature and causes of learning barriers experienced by specific students. It is followed by guidance, appropriate support and intervention strategies. This type of assessment is useful to make referrals for students requiring specialist help.

6.3 Formative assessment
This assessment monitors and supports teaching and learning. It is used to determine student strengths and weaknesses and provide feedback on progress. This determines if a student is ready for summative assessment.

6.4 Summative assessment
This type of assessment gives an overall picture of student progress at a given time. It determines whether the student is sufficiently competent to progress to the next level.

7 PLANNING ASSESSMENT
An assessment plan should cover three main processes:

7.1 Collecting evidence
The assessment plan indicates which Subject Outcomes and Assessment Standards will be assessed, what assessment method or activity will be used and when this assessment will be conducted.

7.2 Recording
Recording refers to the assessment instruments or tools with which the assessment will be captured or recorded. Therefore, appropriate assessment instruments must be developed or adapted.

7.3 Reporting
All the evidence is put together in a report to deliver a decision for the subject.

8 METHODS OF ASSESSMENT
Methods of assessment refer to who carries out the assessment and includes lecturer assessment, self-assessment, peer assessment and group assessment.

<table>
<thead>
<tr>
<th>LECTURER ASSESSMENT</th>
<th>The lecturer assesses students’ performance against given criteria in different contexts, such as individual work, group work, etc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>SELF-ASSESSMENT</td>
<td>Students assess their own performance against given criteria in different contexts, such as individual work, group work, etc.</td>
</tr>
<tr>
<td>PEER ASSESSMENT</td>
<td>Students assess another student’s or group of students’ performance against given criteria in different contexts, such as individual work, group work, etc.</td>
</tr>
<tr>
<td>GROUP ASSESSMENT</td>
<td>Students assess the individual performance of other students within a group or the overall performance of a group of students against given criteria.</td>
</tr>
</tbody>
</table>

9 INSTRUMENTS AND TOOLS FOR COLLECTING EVIDENCE
All evidence collected for assessment purposes is kept or recorded in the student’s PoE.

The following table summarises a variety of methods and instruments for collecting evidence. A method and instrument is chosen to give students ample opportunity to demonstrate the Subject Outcome has been attained. This will only be possible if the chosen methods and instruments are appropriate for the target group and the Specific Outcome being assessed.
### METHODS FOR COLLECTING EVIDENCE

<table>
<thead>
<tr>
<th>Assessment instruments</th>
<th>Observation-based (Less structured)</th>
<th>Task-based (Structured)</th>
<th>Test-based (More structured)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Observation</td>
<td>• Assignments or tasks</td>
<td>• Examinations</td>
</tr>
<tr>
<td></td>
<td>• Class questions</td>
<td>• Projects</td>
<td>• Class tests</td>
</tr>
<tr>
<td></td>
<td>• Lecturer, student, parent discussions</td>
<td>• Investigations or research</td>
<td>• Practical examinations</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Case studies</td>
<td>• Oral tests</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Practical exercises</td>
<td>• Open-book tests</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Demonstrations</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Role-play</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Interviews</td>
<td></td>
</tr>
</tbody>
</table>

### Assessment tools

<table>
<thead>
<tr>
<th>Observation sheets</th>
<th>Checklists</th>
<th>Marks (e.g. %)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lecturer's notes</td>
<td>Rating scales</td>
<td>Rating scales (1-7)</td>
</tr>
<tr>
<td>Comments</td>
<td>Rubrics</td>
<td></td>
</tr>
</tbody>
</table>

### Evidence

<table>
<thead>
<tr>
<th>Focus on individual students</th>
<th>Subjective evidence based on lecturer observations and impressions</th>
<th>Open middle: Students produce the same evidence but in different ways.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Students answer the same questions in the same way, within the same time.</td>
</tr>
</tbody>
</table>

### 10 TOOLS FOR ASSESSING STUDENT PERFORMANCE

**Rating scales** are marking systems where a symbol (such as 1 to 7) or a mark (such as 5/10 or 50%) is defined in detail. The detail is as important as the coded score. Traditional marking, assessment and evaluation mostly used rating scales without details such as what was right or wrong, weak or strong, etc.

**Task lists** and **checklists** show the student what needs to be done. These consist of short statements describing the expected performance in a particular task. The statements on the checklist can be ticked off when the student has adequately achieved the criterion. Checklists and task lists are useful in peer or group assessment activities.

**Rubrics** are a hierarchy (graded levels) of criteria with benchmarks that describe the minimum level of acceptable performance or achievement for each criterion. Using rubrics is a different way of assessing and cannot be compared to tests. Each criterion described in the rubric must be assessed separately. Mainly two types of rubrics, namely holistic and analytical, are used.

### 11 SELECTING AND/OR DESIGNING RECORDING AND REPORTING SYSTEMS

The selection or design of recording and reporting systems depends on the purpose of recording and reporting student achievement. **Why** particular information is recorded and **how** it is recorded determine which instrument will be used.

Computer-based systems, for example spreadsheets, are cost and time effective. The recording system should be user-friendly and information should be easily accessed and retrieved.

### 12 COMPETENCE DESCRIPTIONS

All assessment should award marks to evaluate specific assessment tasks. However, marks should be awarded against rubrics and not be simply a total of ticks for right answers. Rubrics should explain the competence level descriptors for the skills, knowledge, values and attitudes (SKVAs) that a student must demonstrate to achieve each level of the rating scale.

When lecturers or assessors prepare an assessment task or question, they must ensure that the task or question addresses an aspect of a Subject Outcome. The relevant Assessment Standard must be used to create the rubric to assess the task or question. The descriptions must clearly indicate the minimum level of attainment for each category on the rating scale.
13 STRATEGIES FOR COLLECTING EVIDENCE

A number of different assessment instruments may be used to collect and record evidence. Examples of instruments that can be (adapted and) used in the classroom include:

13.1 Record sheets
The lecturer observes students working in a group. These observations are recorded in a summary table at the end of each project. The lecturer can design a record sheet to observe students’ interactive and problem solving-skills, attitudes towards group work and involvement in a group activity.

13.2 Checklists
Checklists should have clear categories to ensure that the objectives are effectively met. The categories should describe how the activities are evaluated and against what criteria they are evaluated. Space for comments is essential.

SECTION C: ASSESSMENT IN CONTACT CENTRE OPERATIONS

1 SCHEDULE OF ASSESSMENT
At NQF levels 2, 3 and 4, lecturers will conduct assessments as well as develop a schedule of formal assessments that will be undertaken in the year. All three levels also have an external examination that accounts for 50 percent of the total mark. The marks allocated to assessment tasks completed during the year, kept or recorded in a PoE account for the other 50 percent.

The PoE and the external assessment include practical and written components. The practical assessment in Contact Centre Operations must, where necessary, be subjected to external moderation by Umalusi or an appropriate Education and Training Quality Assurance (ETQA) body, appointed by the Umalusi Council in terms of Section 28(2) of the General and Further Education and Training Quality Assurance Act, 2001 (Act No. 58 of 2001).

2 RECORDING AND REPORTING
Contact Centre Operations, as is the case for all the other Vocational subjects, is assessed according to five levels of competence. The level descriptions are explained in the following table.

<table>
<thead>
<tr>
<th>RATING CODE</th>
<th>RATING</th>
<th>MARKS %</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Outstanding</td>
<td>80-100</td>
</tr>
<tr>
<td>4</td>
<td>Highly Competent</td>
<td>70-79</td>
</tr>
<tr>
<td>3</td>
<td>Competent</td>
<td>50-69</td>
</tr>
<tr>
<td>2</td>
<td>Not yet competent</td>
<td>40-49</td>
</tr>
<tr>
<td>1</td>
<td>Not achieved</td>
<td>0-39</td>
</tr>
</tbody>
</table>

The programme of assessment should be recorded in the Lecturer’s Portfolio of Assessment for each subject. The following at least should be included in the Lecturer’s Assessment Portfolio:

- A contents page
- The formal schedule of assessment
- The requirements for each assessment task
- The tools used for each assessment task
- Recording instrument(s) for each assessment task
- A mark sheet and report for each assessment task

The college must standardise these documents.
The student’s PoE must include at least:

- A contents page
- The assessment tasks according to the assessment schedule
- The assessment tools or instruments for the task
- A record of the marks (and comments) achieved for each task

Where a task cannot be contained as evidence in the PoE, its exact location must be recorded and it must be readily available for moderation purposes.
CONTACT CENTRE OPERATIONS
LEVEL 4
Contact Centre Operations
National Certificates (Vocational)

3 INTERNAL ASSESSMENT OF SUBJECT OUTCOMES IN CONTACT CENTRE OPERATIONS - LEVEL 4

Topic 1: Handle a range of customer complaints in Contact Centres

<table>
<thead>
<tr>
<th>SUBJECT OUTCOME</th>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
</table>
| 1.1 & 1.2 Identify the customer’s problem and commit to solving the complaint. | - The nature of the complaint is identified and assessed.  
- The origin of the complaint is identified.  
- Responsibility for action to solve the problem is taken.  
- The problem is documented, according to company regulations and requirements.  
- Commitment to resolve the complaint is demonstrated.  
- The customer is totally satisfied with the complaint process to date.  
- The company provides support for both the individual and the customer. | - Identify the nature and origin of the complaint.  
- Take responsibility for action to solve the problem.  
- Document the problem, according to company regulations and requirements.  
- Demonstrate commitment to resolve the complaint.  
- Ensure that the customer is totally satisfied with the complaint process.  
- Ensure that the company provides support for both the individual and the customer. |

ASSESSMENT TASKS OR ACTIVITIES
- Facilitator-student discussion.  
- Complaints register.  
- Action plan in respect of handling the various complaints.  
- Record of interactions/data capturing.

<table>
<thead>
<tr>
<th>SUBJECT OUTCOME</th>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
</table>
| 1.3 Arrange correct planning and solutions to the customer’s problem. | - The correct solution is applied to solve the customer’s problem.  
- Contact is maintained with all relevant stakeholders.  
- Correct solution is applied to the customer’s complaint within the agreed timeframe. | - Apply the correct solution to solve the customer’s problem within the agreed timeframe.  
- Maintain contact with all relevant stakeholders. |

ASSESSMENT TASKS OR ACTIVITIES
- Facilitator-student discussion.  
- Report.  
- Record of interactions/data capturing.

<table>
<thead>
<tr>
<th>SUBJECT OUTCOME</th>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
</table>
| 1.4 Communicate with all stakeholders. | - Relevant internal parties are notified of the complaint and its rooting.  
- Immediate superior is notified of the customer’s complaint, for further action.  
- The customer is communicated with regarding the outcome and progress of the solution. | - Notify relevant internal parties of the complaint and its rooting.  
- Notify the immediate superior of the customer’s complaint for further action.  
- Communicate with the customer with regard to the outcome and progress of the solution. |

ASSESSMENT TASKS OR ACTIVITIES
- Facilitator-student discussion.  
- Complaint report.  
- Record of interactions/data capturing.
SUBJECT OUTCOME

1.5 Provide practical business solutions.

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Partnership is arranged between other stakeholders and the organisation, to facilitate the solution of the customer’s problem.</td>
<td></td>
</tr>
<tr>
<td>• Relationships are built by solving the customer’s complaint and by increasing sales.</td>
<td>• Arrange partnership between other stakeholders and the organisation, to facilitate the solution of the customer’s problem.</td>
</tr>
<tr>
<td>• Build relationships by solving the customer’s complaint and by increasing sales.</td>
<td></td>
</tr>
</tbody>
</table>

ASSESSMENT TASKS OR ACTIVITIES

• Facilitator-student discussion.
• Simulated partnership agreements.

Topic 2: Customer and market related trends impacting on Contact Centres

SUBJECT OUTCOME

2.1 Identify client and market related trends.

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Sufficient market research is conducted.</td>
<td>• Conduct sufficient market research.</td>
</tr>
<tr>
<td>• Relevant factors specific to the research are identified.</td>
<td>• Identify relevant factors specific to the research.</td>
</tr>
<tr>
<td>Range: Includes but is not limited to products, clients and services.</td>
<td>Range: Includes but is not limited to products, clients and services.</td>
</tr>
<tr>
<td>• Trends identified are specific to the industry.</td>
<td>• Identify trends specific to the industry.</td>
</tr>
<tr>
<td>• Data is acquired from reliable sources.</td>
<td>• Acquire data from reliable sources.</td>
</tr>
</tbody>
</table>

ASSESSMENT TASKS OR ACTIVITIES

• Facilitator-student discussion.
• Research activity documented.
• Trend report.
• Resource list.

SUBJECT OUTCOME

2.2 Analyse client and market related trends.

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Comparative analyses are accurately conducted.</td>
<td>• Conduct comparative analyses accurately.</td>
</tr>
<tr>
<td>• Trend analysis is comprehensively completed.</td>
<td>• Complete trend analysis comprehensively.</td>
</tr>
<tr>
<td>• The analysis is consistent with industry and company specific requirements.</td>
<td>• Ensure that the analysis is consistent with industry and company specific requirements.</td>
</tr>
</tbody>
</table>

ASSESSMENT TASKS OR ACTIVITIES

• Facilitator-student discussion.
• Trend analysis.
• Checklist.
## Subject Outcome

### 2.3 Recommend an initiative.

<table>
<thead>
<tr>
<th>Assessment Standard</th>
<th>Learning Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Recommendations are highlighted including profitability, potential business needs, sustainability and practicalities.</td>
<td>• Ensure that recommendations are highlighted including profitability, potential business needs, sustainability and practicalities.</td>
</tr>
<tr>
<td>• Recommendations are described and clearly stated.</td>
<td>• Clearly state and describe recommendations.</td>
</tr>
<tr>
<td>• Recommendations are based on valid analysis.</td>
<td>• Base recommendations on a valid analysis.</td>
</tr>
<tr>
<td>• Recommendations are complete.</td>
<td>• Ensure that recommendations are complete.</td>
</tr>
<tr>
<td>• Recommendations are compliant with company specific formatting requirements.</td>
<td>• Ensure that recommendations are compliant with company specific formatting requirements.</td>
</tr>
</tbody>
</table>

**Assessment Tasks or Activities**
- Facilitator-student discussion.
- Written recommendations according to company format and requirements.
- Checklist.

### Topic 3: A personal Contact Centre culture

**Subject Outcome**

### 3.1 Identify and define what a Contact Centre is.

<table>
<thead>
<tr>
<th>Assessment Standard</th>
<th>Learning Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>• A definition of a Contact Centre is verbally explained.</td>
<td>• Explain verbally what a Contact Centre is.</td>
</tr>
<tr>
<td>• All elements of a Contact Centre are identified.</td>
<td>• Identify all elements of a Contact Centre.</td>
</tr>
<tr>
<td>• A Contact Centre is put into context with other functions.</td>
<td>• Put a Contact Centre into context with other functions.</td>
</tr>
</tbody>
</table>

**Assessment Tasks or Activities**
- Facilitator-student discussion.
- Oral assessment.
- Written assignment.

### 3.2 Identify Contact Centre principles and concepts.

<table>
<thead>
<tr>
<th>Assessment Standard</th>
<th>Learning Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Contact Centre principles are verbally defined.</td>
<td>• Define Contact Centre principles verbally.</td>
</tr>
<tr>
<td>• The components of Contact Centre concepts are defined.</td>
<td>• Define the components of Contact Centre concepts.</td>
</tr>
</tbody>
</table>

**Assessment Tasks or Activities**
- Facilitator-student discussion.
- Oral assessment.
- Written assignment.

### 3.3 Identify, list and persuade others of the benefits of a Contact Centre culture

<table>
<thead>
<tr>
<th>Assessment Standard</th>
<th>Learning Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Benefits for self are identified and listed</td>
<td>• Identify and list benefits for self.</td>
</tr>
<tr>
<td>• Benefits for self are explained</td>
<td>• Explain benefits for self.</td>
</tr>
<tr>
<td>• Benefits for others are identified and listed</td>
<td>• Identify and list benefits for others.</td>
</tr>
<tr>
<td>• Benefits are explained to others</td>
<td>• Explain benefits to others.</td>
</tr>
<tr>
<td>• People are influenced towards a Contact Centre culture</td>
<td>• Persuade people of the advantages of a Contact Centre culture.</td>
</tr>
</tbody>
</table>
Contact Centre Operations
National Certificates (Vocational)

ASSESSMENT TASKS OR ACTIVITIES

• Facilitator-student discussion.
• Assignment in comparative manner.
• Topic test.

Topic 4: Performance standards in a Contact Centre

SUBJECT OUTCOME

4.1 Apply statistical understanding to performance targets.

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relevant performance standards data is accessed.</td>
<td>Access relevant performance standards data and provide an accurate interpretation thereof.</td>
</tr>
<tr>
<td>An accurate interpretation is provided.</td>
<td>Ensure that standards for measuring performance are within control parameters and quality commitments.</td>
</tr>
<tr>
<td>Standards for measuring performance are within control parameters and quality commitments.</td>
<td></td>
</tr>
</tbody>
</table>

ASSESSMENT TASKS OR ACTIVITIES

• Obtain performance standard data available (hard copies).
• Facilitator-student discussion.

SUBJECT OUTCOME

4.2 Review performance and implement performance standard benchmarks

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance reviews are conducted regularly as per company requirements.</td>
<td>Conduct performance reviews regularly as per company requirements.</td>
</tr>
<tr>
<td>Performance discrepancies are identified and recorded.</td>
<td>Identify and record performance discrepancies.</td>
</tr>
<tr>
<td>Selected review methods are relevant, fair and communicated to individuals being evaluated.</td>
<td>Ensure that selected review methods are relevant, fair and communicated to individuals.</td>
</tr>
<tr>
<td>Opportunities for improvement are identified and recorded.</td>
<td>Identify and record opportunities for improvement.</td>
</tr>
<tr>
<td>Appropriate action is taken with respect to achievements of performance standards.</td>
<td>Take appropriate action with respect to achievements of performance standards.</td>
</tr>
<tr>
<td>Action is implemented timeously and according to company specific requirements.</td>
<td>Implement action timeously and according to company specific requirements.</td>
</tr>
<tr>
<td>Benchmarks are consistently maintained.</td>
<td>Maintain benchmarks consistently.</td>
</tr>
</tbody>
</table>

ASSESSMENT TASKS OR ACTIVITIES

• Facilitator-student discussion.
• Checklists.
• Review reports.
• Written recommendations.
• Implementations plans.
• Role play.
• Checklist.
### Topic 5: Contact Centre specific sales techniques

**SUBJECT OUTCOME**

5.1 Identify client types and needs.

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Sales opportunities are identified.</td>
<td>• Identify sales opportunities.</td>
</tr>
<tr>
<td>- Client needs are accurately identified within an industry specific context.</td>
<td>• Identify client needs accurately within an industry specific context.</td>
</tr>
</tbody>
</table>

**ASSESSMENT TASKS OR ACTIVITIES**

- Facilitator-student discussion.
- Practical exercise/research.
- Report.
- Checklist.

5.2 Cross-sell products in a Contact Centre.

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Multi-sales are generated as per industry specific requirements.</td>
<td>• Generate multi-sales as per industry specific requirements.</td>
</tr>
<tr>
<td>- All product related information is accurately provided.</td>
<td>• Provide all product related information accurately.</td>
</tr>
<tr>
<td>- Company specific procedures and industry regulations are adhered to.</td>
<td>• Adhere to company specific procedures and industry regulations.</td>
</tr>
</tbody>
</table>

**ASSESSMENT TASKS OR ACTIVITIES**

- Facilitator-student discussion.
- Practical exercise.
- Checklist.

5.3 Close sales in order to meet targets.

<table>
<thead>
<tr>
<th>ASSESSMENT STANDARD</th>
<th>LEARNING OUTCOME</th>
</tr>
</thead>
<tbody>
<tr>
<td>- The client’s needs are met.</td>
<td>• Meet the needs of the clients.</td>
</tr>
<tr>
<td>- The sale is confirmed and authorised according to company specific procedures and legislative requirements.</td>
<td>• Confirm and authorised according to company specific procedures and legislative requirements.</td>
</tr>
<tr>
<td>- The number of sales closed complies with company specific targets. Range: Sales includes but is not limited to rand value and units.</td>
<td>• Ensure that the number of sales closed complies with company specific targets. Range: Sales includes but is not limited to rand value and units.</td>
</tr>
</tbody>
</table>

**ASSESSMENT TASKS OR ACTIVITIES**

- Facilitator-student discussion.
- Practical exercise.
- Checklist.
- Topic test.
4 SPECIFICATIONS FOR EXTERNAL ASSESSMENT IN CONTACT CENTRE OPERATIONS LEVEL 4

4.1 Integrated Summative Assessment Task (ISAT)
A compulsory component of EASS is the Integrated Summative Assessment Task (ISAT), which is a major assessment task that draws on the students' cumulative learning achieved throughout the full year. The task requires integrated application of competence and is executed and recorded in compliance with assessment conditions.

In Contact Centre Operations Level 4 students will have achieved the competencies during the year but the competencies will be assessed cumulatively in a single assessment/exam session at the end of the year.

The ISAT will be set by the externally appointed examiner and be conveyed to colleges within the first quarter of each year.

The integrated assessment approach allows for the student to be assessed in more than one subject within the same ISAT.

4.2 National examination
A national examination is conducted annually in October or November by means of a paper set externally and marked and moderated externally. The following distribution of cognitive application is suggested:

<table>
<thead>
<tr>
<th>LEVEL 4</th>
<th>KNOWLEDGE AND COMPREHENSION</th>
<th>APPLICATION</th>
<th>ANALYSIS, SYNTHESIS AND EVALUATION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>55% - 75%</td>
<td>20% - 35%</td>
<td>5% - 15%</td>
</tr>
</tbody>
</table>