

CFACC37

Coordinate resource planning strategy in a contact centre



Overview

What this standard is about

Contact centre activity is subject to constant variation in volume. Monitoring of activity levels and types of contact provides vital information for resource planning. Organisational strategy sets the service offer of the contact centre which has direct implications for the level of resourcing that is required. The anticipated volumes of activity also have a direct influence on resourcing and so the accuracy and validity of those forecasts is critical. By combining these two aspects of contact centre strategy, policies can be formed or updated.

This standard is about your strategic role in forming a resourcing policy that makes a real contribution to efficiency and effectiveness in the contact centre.

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Performance criteria

You must be able to:

Review contact centre strategy from the viewpoint of demand and resource implications

- P1 Identify business strategy that may impact on resourcing policies for a contact centre
- P2 Use existing resource planning and allocation policies to assess the practicality of business strategy
- P3 Agree with appropriate colleagues resource policies and associated techniques that need reviewing and possibly updating

Review and update the scope of forecasting techniques and procedures for communicating resource information

- P4 Define the strategic importance and objectives of demand forecasting
- P5 Review demand forecasting techniques and tools currently in use to evaluate their effectiveness and contribution to contact centre operations
- P6 Review methods used to communicate demand information within the organisation
- P7 Consult with colleagues regarding possible developments of methods for demand forecasting and internal communication of results
- P8 Make agreed recommendations and implement changes in demand forecasting and communication of results

Define organisational policies for resource management including staffing and work scheduling in a contact centre

- P9 Review organisational policies for resourcing, scheduling and staffing activities
- P10 Identify areas in which resourcing, scheduling and staffing policies meet and diverge from organisational strategy or objectives
- P11 Consult colleagues about options for improvement of resourcing, scheduling and staffing policies
- P12 Define or revise organisational resourcing, scheduling and staffing policies following agreed principles

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Knowledge and understanding

You need to know and understand:

- K1 The services or products offered or supported by contact centre operations
- K2 Organisational requirements and external regulation or legislation that impact on contact centre operations
- K3 Organisational procedures and guidelines relating to contact centre operations
- K4 The importance of resource planning to match demand forecasts with organisational strategy overall
- K5 Features of business strategy that impact most clearly on resource planning
- K6 The importance of creating resource planning and management policies that are practical to implement
- K7 The reasons why colleagues should be involved in review and update of resource planning and management development
- K8 Techniques for communicating demand forecasts and resource plans effectively to contact centre staff
- K9 Methods for designing and presenting organisational policies for demand forecasting and resource management
- K10 The links between demand forecasting, resource planning and staffing requirements in a contact centre

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