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## Overview

This standard is about using contact centre systems and technologies to handle customer contacts. These are used for handling customer contacts and accessing information required in your role. The standard addresses accessing customer information, dealing with customers, using a range of available technologies and functionalities to enhance customer service with the main focus on first contact resolution. It involves identifying the categories of contact you are authorised to deal with, understanding the organisational procedures for handling contacts, using technology systems and variety of contact methods (telephone calls, social, live chat, web chat, etc.) to input contact information and understanding when to refer contacts to colleagues when you are unable to support them. It also involves agreeing organisational reports required, using technologies to produce reports and checking these reports before using them and sharing them with others

The standard is for contact centre professionals who are required to use contact centre systems and technologies to handle customer contacts.

## Performance criteria

*You must be able to:*

### **Handle customer contacts in the contact centre**

1. use contact handling systems to deal with customers
2. handle contacts identified by the contact distribution system
3. identify the categories of contact that you are authorised to handle and who to pass other contacts on to
4. access customer information through the system in accordance with organisational procedures
5. identify what you need to do if contact with the customer becomes too complex or difficult to respond to
6. describe and apply the organisational procedures and guidelines needed to complete each type of contact
7. identify the organisational systems and technologies that support your handling of contacts

### **Use contact centre systems and technologies to carry out customer contacts**

8. log into the appropriate technology system to deal with customer contacts within your area of responsibility
9. establish customer identity from information they give and validate it using information from the system
10. identify who you would need to refer to if the information given cannot be validated
11. follow defined pathways through the technology system to complete customer contact tasks
12. use features of the telephony contact handling system to control customer contacts

13. locate information on the system needed to complete a customer contact
14. refer the call to an authorised colleague if you cannot complete the customer contact
15. input information to the system following organisational procedures
16. follow current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information

#### **Use features of systems and technologies to handle customer contacts with a contact centre**

17. make adjustments to individual system settings for communication with customers through telephony, web technologies, radio or other interactive functionalities
18. use technologies appropriately by making choices between different functionality to enhance customer service
19. explain the benefits and procedures of different technology systems for communication with customers

#### **Report on customer and contact handling information using pre-defined formats**

20. deal with customers on first contact basis to resolve any issues or concerns or refer the contact to the relevant member of staff
21. identify customer and contact handling information require for work planning or organisational reporting
22. agree organisational report needs with a team leader or other member of staff with appropriate authority
23. make any required adjustments to pre-defined report formats to ensure that outputs are as agreed
24. use software functionality to produce pre-defined customer information and contact handling reports

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25. check report results for accuracy before making full use of them
  26. follow current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information

## Knowledge and understanding

### *You need to know and understand:*

1. the information about the services and products offered or supported by the contact centre
2. the contacts you are authorised to handle
3. how to record and input information following organisational procedures
4. the organisational procedures and guidelines for handling different types of customer contacts
5. the organisational systems and technologies required to support handling customer contacts
6. the variety of contact methods through relevant systems and technologies
7. the process for referring contacts when these are outside the limits of your authority
8. the procedures for logging on to the technology systems
9. the procedures for identification and validation of customer identity
10. how to respond to prompts from the system indicating the pathway to be followed
11. the features of the telephony contact system required to control customer contacts
12. the techniques for locating information on the contact centre system
13. the organisational requirements and external regulation or legislation that impact on contact centre operations
14. the organisational procedures and guidelines for customer contact handling
15. the organisational procedures for customer identification and identity validation
16. the purpose of contact distribution systems and how your own organisation's system works
17. the features of your organisation's customer information systems that enable you to deal with customers on first contact basis
18. the system settings that enable you to access different interactive functionalities
19. how to make choices between different interactive functionalities to optimise customer service
20. the benefits of different technologies for dealing with customers
21. how to identify information required in reports for planning or organisational feedback
22. the importance of agreeing report content with a team leader or person with

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appropriate authority

23. the types of adjustments that may be required to pre-defined reports

24. the software features and functions to produce pre-defined reports

25. the importance of checking report output for accuracy before use

26. the current legal, regulatory and data protection requirements, codes of practice and organisational policies and procedures relating to handling personal information

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