Learner PoE Guide

LP6:
Contact Centre Service Levels and Statistical Data

Learner Name and Surname	
Learner ID	
Company / Branch	
Date	
Learner Signature	

SAQA ID 10313: Comply with service levels as set out in a Contact Centre operation; NQF Level 4, 10 Credits
SAQA ID 10322: Retrieve and correlate statistical data applicable to Contact Centres; NQF Level 4, 12 Credits

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Foreword to the Learner

The purpose of this guide is to provide the learners with process and requirements of successfully completing and submitting a Portfolio of Evidence for assessment against the unit standards of this learning programme:

Programme	LP6: Contact Centre Service Levels and Statistical Data
Unit Standards	SAQA ID 10313: Comply with service levels as set out in a Contact Centre operation; NQF Level 4, 10 Credits SAQA ID 10322: Retrieve and correlate statistical data applicable to Contact Centres; NQF Level 4, 12 Credits

Assessment in Outcomes Based Education is not only focused on what learners can do, but intends to develop learners holistically. In other words, learners are also required to demonstrate certain life-skills, which will not only enhance their learning, but will also ensure that these skills are transferable to their private lives.

In Outcomes-based education and training we use both formative and summative assessments:

- **Formative assessment** refers to assessment that takes place during the process of learning and teaching.
- **Summative assessment** is assessment for making a judgement about achievement. This is carried out when a learner is ready to be assessed at the end of a programme of learning.

Results initially collected for formative assessment, can be used for summative assessment, thus avoiding repetition.

Assessment Process

Learner Signature	Date

Assessment Process Steps

Step 1: **Plan and prepare for the assessment**	

Assessor needs to:
• Understand and review all the requirements of the assessment in terms of evidence required to prove competence
• Identify logistical arrangements that have to be made such as the venue
• Familiarise him/herself with assessment instruments and tools
• Identify and prepare any resources required for assessment, such as equipment, people and other resources for the assessment
• Ensure that he/she is familiar with the related policies - Assessment, Moderation, RPL and Appeals policy
	Document:
	☐ Unit Standard
	☐ Curriculum, Strategy and Alignment document
	☐ Assessment Guide
	  ☐ Assessment Strategy and process
	☐ Assessment related policies
	☐ Assessment Feedback document
	  ☐ Assessment Preparation Checklist

Learner needs to:
• Be informed of, and agreement reached over: the requirements for the assessment; the roles and responsibilities of the learner with regard to his/her assessment; the special needs of the learner (and how these can be accommodated) and how the evidence is to be collected; and also guided in preparing for assessment by the facilitator and/or assessor as per the Pre-Assessment Preparation Sheet criteria and then complete and sign the document in agreement with the assessment process
• Be given the contact details of the facilitator, assessor and any other support person from the training provider, for possible future assessment process assistance needs
• Be guided in planning for the assessment by the facilitator and/or assessor as per the Assessment Plan criteria and then complete and sign the document in agreement with the assessment plan that he/she created
• Be guided in understanding of the requirements of authenticity as per the Declaration of Authenticity form by the facilitator and/or assessor and then complete and sign the document in agreement with the authenticity requirements in the assessment process
• Be guided in understanding the Appeals Policy and Procedure, as well as the Appeals Form by the facilitator and/or assessor and then complete and sign the declaration of understanding on the Appeals Procedure form
• Be given answers to any assessment process related questions
	Document:
	☐ Learner Guide
	☐ Learner Workbook
	☐ Learner Portfolio of Evidence Guide
	  ☐ Pre-Assessment Preparation Sheet
	  ☐ Assessment Plan
	  ☐ Declaration of Authenticity
	  ☐ Declaration of understanding the Appeals Procedure
	  ☐ Assessment Activities Checklist
	  ☐ Learner ID, CV and certificates
	  ☐ Learner Workbook placeholder
	  ☐ Knowledge questions
	  ☐ Practical Activity for completion in the workplace
	  ☐ Witness Testimony for supervisor observation and feedback
	  ☐ Logbook

Learner Signature	Date

Step 2: **Conduct and record the assessment**	

Assessor needs to:
• Conduct the assessment in an appropriate and nonthreatening manner and/or environment and use the assessment principles when assessing the evidence
• Review and assess the evidence as submitted by the learner / candidate in their Learner Portfolio of Evidence Guide, by referring to the Assessment Guide for guidelines and model answers (memoranda):
  ○ Learner workbook filed in the Learner PoE
  ○ Knowledge questions
  ○ Practical Activity completed in the workplace
  ○ Witness Testimony and Logbook completed in the workplace
• Make a judgement about the evidence against the criteria of the unit standard in the Final Assessment Recording (evidence grid) and the model answers provided, using the principles of good evidence as a guideline
• Record the assessment process undertaken and the assessment findings and decisions taken in the required format on the specific documentation in the Assessment Feedback document:
  ○ Assessment Checklist
  ○ Assessment record
  ○ Final assessment recording document
  ○ VARCCS evaluation
  ○ Assessment outcome
• When learners have to undergo re-assessment, they have to be given feedback so that they can concentrate on areas of weaknesses and only be re-assessed on NYC criteria. Re-assessment should comply with the following conditions:
  ○ Re-assessment should take place in the same situation or context and under the same conditions
  ○ The same method and assessment instrument may be used, but the task and materials should be changed, depending on the QMS requirements of the training provider.
	Document:
	☐ Unit Standard
	☐ Learner PoE guide submitted for assessment
	☐ Assessment Guide
	☐ Assessment Feedback document:
	  ☐ Assessment Checklist
	  ☐ Assessment record
	  ☐ Final assessment recording document
	  ☐ VARCCS evaluation
	  ☐ Assessment outcome

Step 3: **Provide assessment feedback to the learner**	

Assessor needs to:
• Provide the learner with feedback about the assessment conducted:
  ○ Provide feedback in both a positive and constructive manner
  ○ Advise / inform the learners of outstanding and/or required evidence
• Record all communication with the learner
 	
Learner needs to:
• Confirm receipt, understanding and acceptance of the feedback by completing and signing the declaration in the Assessment Outcome section of the Assessment Feedback document
	Document:
	☐ Assessment Feedback document:
	  ☐ Assessment outcome document

Learner Signature	Date

Step 4: **Review and report on the assessment**	

Learner needs to:
• Review the assessment process by completing the Learner's Review of the Assessment Process (questionnaire)
Assessor needs to:
• Review the assessment process and report on it using either the:
  ○ Assessor' and Moderator's Review of the Assessment (questionnaire); or
  ○ Group Assessor' and Moderator's Review of the Assessment (questionnaire)
Training Provider needs to:
• Record the outcome of the assessment in the relevant quality management system database / matrix
• Record and/or submit the assessment results to the NLRD (National Learner Records Database) of the relevant ETQA
• Submit the specific number of learner portfolios for moderation, as per the training provider QMS
• Release the results of assessment to the relevant learner stakeholders, e.g. HR, mentor, supervisor; agreed to by the learner
• Manage any learner appeals against the assessment outcome, according to the Appeals Policy and Procedure
• All the documents or copies thereof, as prescribed previously, must be kept on file as part of the learner portfolio of evidence.
• Learner's portfolios of evidence must be readily available for internal and external moderation and verification by the appropriate practitioners, until after the ETQA verification process has taken place. The portfolios of evidence may then be kept (storage) or returned to the learner according to the training provider's QMS policy.
	Document:
	☐ Assessment Feedback document:
	  ☐ Learner's review of the assessment process
	  ☐ Assessor' and Moderator's Review of the Assessment
	  ☐ Group Assessor' and Moderator's Review of the Assessment
	☐ Training Provider specific QMS documents for:
	  ☐ Record of assessment
	  ☐ submitting the results to the NLRD
	  ☐ moderation
	  ☐ learner assessment result release

The Assessment Process Role-players

The assessment team consists of the following people that each has a specific role and responsibilities to fulfil:

Learner	Learners will participate in the facilitated classroom training section of the learning programme by participating in formative assessment class activities / exercises in the Learner Workbook. The learner needs to: • Attend the learning / training session • Participate in the learning and form part of syndicate group / small workgroup for activities • Do research and prepare for participation during the training session • Complete the assignments, activities and portfolio Learners will complete and submit their individual Portfolios of Evidence, using the Learner Portfolio of Evidence Guide to successfully create, gather and submit the required evidence for assessment, by completing the following: • required administration documentation • completed Learner Workbook containing the formative assessment Class

Learner Signature	Date

	Activities and Programme Reflection
	• individual assignments and practical workplace activities:
	  ○ Knowledge Questions
	  ○ Practical Workplace Activity
	  ○ Witness Testimony – supervisor confirmation of application of the knowledge and skills in the workplace
	  ○ Assessment Activities Checklist – control checklist to ensure all required evidence is submitted by the learner
	Assessments are meant to be as clear and transparent as possible, therefore learners should know:
	• the kinds of assessment activities that they would be asked to perform
	• the standard and level of performance expected
	• the type and amount of evidence to be collected
	• their responsibility regarding the collection of evidence.

Facilitator	It is the role of the facilitator to facilitate the theoretical classroom training and skills practice sessions to groups of learners. The facilitator is also responsible for: • being available for questions regarding the assessment after the training has been completed • acting as Evidence Collection Facilitator, when facilitating formative assessment using the Class Activities in the Learner Workbook • facilitating only a section of the summative assessment - Knowledge Questions in the Learner Portfolio of Evidence Guide • guiding the learners on the use of the Portfolio of Evidence Guide • learning programme administration, e.g. attendance register, training report after the session, and any other related administration required by the training provider

Assessor	The assessor needs to be:
	• qualified as an assessor
	• registered as a constituent assessor with the relevant SETA
	• proficient in the subject matter of the learning area in which they are assessing and an expert in his/her knowledge of the unit standard requirements or qualification for which he/she is registered to assess - the assessor's subject matter knowledge should be at least of a level higher than the learner who is being assessed
	• proficient in the process of assessment - this means that they should:
	  ○ Be familiar with the unit standards that they will be assessing
	  ○ Be familiar with and use the assessment guides
	  ○ Plan the assessment, which includes the selection, design and implementation of assessment activities.
	  ○ Follow the assessment process, i.e. plan and agree on the assessment with the learner; guide the learner in the collection of evidence; conduct the assessment; provide feedback to the learner about the assessment decision
	  ○ Record and report on assessment results
	  ○ Participate in moderation processes
	  ○ Review the assessment and make appropriate changes
	The assessor needs to conduct an assessment subject to the following principles:
	• the application of NQF principles
	• the application of the principles of credible assessment
	• the application of the principles of the collection of and quality of the evidence
	• the assessment being planned and designed on the basis of understanding the requirements of the unit standard, part qualification or qualification that the learner is seeking credit for
	The assessor needs to establish a trusting relationship with learners – not only so that they can perform optimally during an assessment, but also so that the

Learner Signature	Date

	learners will trust that the assessor has their interests at heart.
Moderator	Internal moderators will be moderating assessment activities and supporting the assessors. Their task will be to do the quality assurance of the assessment activities in an ordered and structured way and develop the skills of assessors. Moderation ensures that people who are being assessed are assessed in a consistent, accurate and well-designed manner. It ensures that all assessors who assess a particular unit standard or qualification are using comparable assessment methods and are making similar and consistent judgements about the learners' performance. The moderator needs to be: • qualified as a moderator • registered as constituent moderator with the relevant SETA • experienced in the related field of assessment and moderation The moderator will, according to the Quality Management System of the training provider: • Moderate 25% of all portfolios within 2 weeks of assessment or as per the requirements stated in the training provider QMS • Validate the quality of the judgements made. The judgement is either confirmed or overturned on valid grounds.
Verifier	The moderation system will in turn be quality assured by the ETQAs who will have qualified verifiers in place to monitor moderation systems and support moderators. Some larger organisations will prefer to appoint internal verifiers to take a systemic view of internal assessment and moderation
Training Provider	The training provider needs to ensure that qualified facilitators, assessors and moderators are employed or contracted to perform the required functions, using quality materials as is required in the training provider quality management system. The training provider also needs to provide for the appeals process. If the learner / candidate is not happy about the process or findings of the assessment, he/she can put in an appeal to have the assessment reviewed by the training provider. This will ensure that candidates have a democratic right to overturn decisions that are not fair, not properly motivated or simply not believed. The training provider and ETQA should ensure that there is an appeals procedure in place, i.e. appeals against an assessment decision. Learners should be secure in the knowledge that they can appeal against an unfair assessment.

Competent vs. Not Yet Competent

Learners being assessed are not allocated a percentage (for example 55%) on completion of the learning. Rather, they are either deemed competent or not yet competent.

Training is delivered using an outcome-based style of teaching and learning. Learners drive the process of learning and educators need to facilitate the creation of learning opportunities.

Once a learner has demonstrated his/her competence through an assignment, task, exam or performance, then s/he is awarded the credits related to that competence.

However, learners deemed not yet competent, are either given another chance to prove competence, or they are re-trained, or they are encouraged to move into a different field of learning.

Requirements for being deemed Competent

Each unit standard indicates the requirements or standards of competence. These are written as assessment criteria. In an outcome-based system learners need to meet ALL these requirements before being deemed competent. However, SAQA has recommended that assessments be weighted according to the purpose of the qualification toward which the learner is learning.

Assessments are therefore designed around the requirements that are stated in the assessment criteria, and are therefore criterion-based. In a curriculum-based system, assessments were made around the norm of a group and were therefore norm-referenced.

A criterion-based assessment can only be performed using evidence that has been generated by the Learner. Types of evidence include direct evidence, indirect evidence and historic evidence:

- **Direct** – this is evidence that is collected directly by the assessor, for instance an assessor finding out whether you can bake a cake will watch you while you do it.
- **Indirect** – this is evidence that you have collected, signed off as authentic and submitted for assessment. For instance, a video of you baking a cake.
- **Historic** – this is evidence of your competence – as assessed by someone else. A certificate of competence issued to you when you completed a course is an example of historic evidence. Documents that you produced while doing a job (usually a few years ago) could also be historic evidence.

Evidence has to meet certain criteria. These criteria are summarised as **VARCS**:

- **V** is for **Valid**: the unit standard or qualification being assessed must require evidence that is submitted for assessment. Otherwise it is not important and cannot be used to find out whether you are competent or not.
- **A** is for **Authentic**: evidence that you submit must be your own work. Group work cannot be submitted as your own work because not only you worked on it.
- **R** is for **Reliable**: the evidence must be from a reliable source. A certificate of competence issued by a provider that is not accredited could be regarded as unreliable.
- **C** is for **Current**: the evidence must demonstrate that your competence is current. It doesn't help that you were able to run a 12 km race 5 years ago – can you still do it today? Currency is also related to the technology that is used to demonstrate competence. It does not help that you are able to boil water using a pot on a stove when electric kettles are the current method used to boil water.
- **S** is for **Sufficient**: the unit standards have several assessment criteria that need to be satisfied. The evidence must satisfy all the criteria or else it is not sufficient.

However, evidence is collected using some kind of instrument. These instruments take different forms. Some instruments include questionnaires, interview schedules, simulations, role-play, observation checklists and products.

Note to the Learner

Dear Learner,

You have opted to undergo assessment and as a result have been presented with this PoE (Portfolio of Evidence). Please go through all sections of this PoE very carefully before submission and make sure that you have included all the information and evidence requested. **Please take note of the following:**

Unit Standard:
A copy of the unit standard has been included. The assessment has been designed in order to meet all requirements as set by this unit standard.

Pre-Assessment Preparation Sheet:
The first step towards completing this PoE is to read through the Pre-Assessment Preparation Sheet. This form contains valuable background information. Your assessor will not be able to assess your portfolio if you have not read and signed this document.

Assessment Plan:
You can use the assessment plan to write down the dates on which you plan to meet specific targets.

Declaration of Authenticity:
Please complete the declaration of authenticity to declare that the evidence that you submit in this PoE is your own work, with the exception of those that you list in the section provided. Your assessor will not be able to assess your portfolio if you have not read, completed and signed this document.

Appeals Procedure and Form
Familiarise yourself with the appeals procedure and sign the document as requested. You will only use the Appeals Form if you would like to appeal against the assessment decision.

Assessment Instruments:
By completing the assessment instruments you will generate / gather the evidence required to meet the outcomes of the unit standard(s). Please follow instructions carefully for both the formative and summative assessments.

Assessment Activities Checklist
As part of the quality management process used by the training provider and the SETA, the learner and his/her supervisor are required to check and sign off that all activities have been completed and submitted in the PoE. Please complete this form, before submitting your PoE.

Learner's Review of the Assessment Process
As part of the quality management process used by the training provider and the SETA, the learner is required to provide feedback to the training provider about the assessment process. Please complete this form, before submitting your PoE.

Please note that you are welcome to contact your facilitator / assessor at any stage should you have any questions pertaining to the assessment.

Learner Signature	Date

Portfolio of Evidence

Please complete the following documents and submit as part of your Portfolio of Evidence:

- Learner's Personal Information form
- Learner ID, CV and Qualifications
- Unit Standard Details
- Assessment Contract document
- Declaration of Authenticity document

Learner Signature	Date

Learner's Personal Information

Please provide the following information for SAQA National Learner Database. The following page provides the information form codes:

Learner's Last Name		
Learner's First Name (s)		
Learner title		
Learner birth date (YYYYMMDD)		
ID Number (attach a copy of ID)		
Equity code		
Nationality code		
Gender code		
Citizen resident status code		
Home language code		
Socioeconomic status code		
Disability status code		
Learner home address		
Learner postal address		
Province code		
Contact Details	**Telephone**	
	Cell phone	
	E-mail	
	Fax	
Company Details	**Company Name**	
	Contact Person (Supervisor)	
	Contact Person Contact Number	
	Postal Address	
Learner's Designation		
Date of Submission		

Learner Signature	Date

Registration Form Codes

Alternative ID type	Equity code	Nationality code	
1 National ID 521 SAQA Member ID 527 Passport Number or Foreign ID Number 529 Driver's License 531 Temporary ID number 533 None 537 Student Number 538 Work Permit Number 539 Employee Number 540 Birth Certificate Number 541 HSRC Register Number 561 ETQA Record Number 565 Refugee Number 535 Unknown	BA Black: African BC Coloured BI Indian / Asian Oth Other WH White U Unknown	SA South Africa SDC SADC except SA ANG Angola BOT Botswana LES Lesotho MAL Malawi MAU Mauritius MOZ Mozambique NAM Namibia SEY Seychelles SWA Swaziland TAN Tanzania ZAI Zaire ZAM Zambia ZIM Zimbabwe	AIS Asian countries AUS Australia Oceania countries EUR European countries NOR North American countries SOU South / Central American c ROA Rest of Africa OOC Other & rest of Oceania NOT N/A: Institution U Unspecified

Citizen/residence status	Home language code	Gender code	Province code
U Unknown SA South Africa O Other D Dual (SA plus other) PR Permanent Resident	Afr Afrikaans Eng English Nde isiNdebele Oth Other SASL South African Sign Language Sep sePedi Ses seSotho Set seTswana Swa siSwati Tsh tshiVenda Xho isiXhosa Xit xiTsonga Zul isiZulu U Unknown	M Male F Female U Unknown	1 Western Cape 2 Eastern Cape 3 Northern Cape 4 Free State 5 Kwazulu/Natal 6 North West 7 Gauteng 8 Mpumalanga 9 Limpopo X Outside South Africa N South Africa National

Disability status	Socioeconomic Status
N None 01 Sight (even with glasses) 02 Hearing (even with a hearing aid) 03 Communication (talking, listening) 04 Physical (moving, standing, grasping) 05 Intellectual (difficulties in learning); retardation 06 Emotional (behavioural or psychological) 07 Multiple 09 Disabled but unspecified U Unknown disability status	01 Employed 02 Unemployed, seeking work 03 Not working, not looking 04 Home-maker (not working) 06 Scholar/student (not w.) 07 Pensioner/retired (not w.) 08 Not working - disabled 09 Not working - no wish to w 10 Not working - N.E.C. 97 N/A: aged <15 98 N/A: Institution U Unspecified

Learner Signature	Date

Learner ID

*Insert a **certified** copy of your Identify Document here:*

Learner CV

Insert a copy of your full CV (Curriculum Vitae) here:

Learner Qualifications

Insert certified copies of relevant qualifications here:

Learner Signature	Date

Unit Standard details

10313

SOUTH AFRICAN QUALIFICATIONS AUTHORITY
REGISTERED UNIT STANDARD:
Comply with service levels as set out in a Contact Centre Operation

SAQA US ID	UNIT STANDARD TITLE			
10313	Comply with service levels as set out in a Contact Centre Operation			
ORIGINATOR				
SGB Marketing				
PRIMARY OR DELEGATED QUALITY ASSURANCE FUNCTIONARY				
-				
FIELD			**SUBFIELD**	
Field 03 - Business, Commerce and Management Studies			Marketing	
ABET BAND	**UNIT STANDARD TYPE**	**PRE-2009 NQF LEVEL**	**NQF LEVEL**	**CREDITS**
Undefined	Regular	Level 4	NQF Level 04	10
REGISTRATION STATUS		**REGISTRATION START DATE**	**REGISTRATION END DATE**	**SAQA DECISION NUMBER**
Reregistered		2018-07-01	2023-06-30	SAQA 06120/18
LAST DATE FOR ENROLMENT		**LAST DATE FOR ACHIEVEMENT**		
2024-06-30		2027-06-30		

This unit standard does not replace any other unit standard and is not replaced by any other unit standard.

PURPOSE OF THE UNIT STANDARD

This unit standard forms part of the qualification, National Certificate in Contact Centre Operations NQF Level 4. Learners working towards this unit standard will be learning towards the full qualification, or will be working within a Contact Centre environment, where the acquisition of competence against this standard will add value to learner's job. This unit standard is intended to enhance the provision of intermediate level service within the Contact Centre industry. The qualifying learner is capable of:
 Demonstrating an understanding of company specific service levels.
Meeting and maintaining service levels.

LEARNING ASSUMED TO BE IN PLACE AND RECOGNITION OF PRIOR LEARNING

 Learners accessing this unit standard or qualification will have demonstrated competency against unit standards in Contact Centres at NQF Level 2 or equivalent.
Learners are expected to have demonstrated competency in language, numeracy, literacy and communication at NQF Level 4 or equivalent.

Learner Signature	Date

UNIT STANDARD RANGE

This standard applies to Contact Centres that are in-bound and/or out-bound within a commercial or emergency context and will include appropriate subject matter in the area in which the learner chooses to operate.

Specific Outcomes and Assessment Criteria:

SPECIFIC OUTCOME 1

Demonstrate an understanding of company specific service levels.

ASSESSMENT CRITERIA

ASSESSMENT CRITERION 1

1. All relevant service levels are explained.

ASSESSMENT CRITERION 2

2. The purpose of service levels is described and explained.

ASSESSMENT CRITERION 3

3. The requirements of all relevant service levels are listed, described and explained.

ASSESSMENT CRITERION RANGE

Service levels include but are not limited to management, information systems, information on systems and wall boards, sign on time, abandoned rate etc., shift changes.

SPECIFIC OUTCOME 2

Meet and maintain service levels.

ASSESSMENT CRITERIA

ASSESSMENT CRITERION 1

1. Relevant company specific levels are implemented.

ASSESSMENT CRITERION 2

2. Implementation processes are monitored to ensure compliance.

ASSESSMENT CRITERION 3

3. Service level timeframes and targets are consistently met as per company specific requirements.

ASSESSMENT CRITERION 4

4. Potential constraints in meeting and maintaining service levels are identified and evaluated.

UNIT STANDARD ACCREDITATION AND MODERATION OPTIONS

Learning programmes leading to the acquisition of these credits will be accredited by the relevant Education, Training, Quality Assurance Body (ETQA).

UNIT STANDARD ESSENTIAL EMBEDDED KNOWLEDGE

- A broad understanding of Windows, Word and Excel operating systems.
- An in-depth understanding of product and industry specific knowledge.
- A general understanding of call centre specific service levels.
- A basic understanding of reading and interpreting management information systems.

Critical Cross-field Outcomes (CCFO):

Learner Signature	Date

UNIT STANDARD CCFO WORKING

 Work effectively with others in the achievement of service level requirements.

UNIT STANDARD CCFO ORGANISING

 Organise and manage oneself and activities responsibly and effectively in responding to and achieving service level requirements.

UNIT STANDARD CCFO COLLECTING

 Collect, analyse, organise and critically evaluate information pertaining to the compliance of service levels.

UNIT STANDARD CCFO COMMUNICATING

 Communicate effectively by demonstrating an application of the understanding of relevant service level agreements in relevant medium desired by client.

UNIT STANDARD CCFO DEMONSTRATING

 Demonstrate an understanding of the world as a set of related systems by recognising the meeting and maintenance of service levels impact on the overall success of the organisation.

UNIT STANDARD CCFO CONTRIBUTING

 In order to contribute to the full personal development of each learner and the social and economic development of society at large, it must be the intention underlying any programme of learning to make an individual aware of the importance of: developing entrepreneurial opportunities while complying with service levels.

QUALIFICATIONS UTILISING THIS UNIT STANDARD:

ID	QUALIFICATION TITLE	OLD LEVEL	NEW LEVEL	STATUS	END DATE	QUALITY ASSURING BODY
93996	Further Education and Training Certificate: Contact Centre Operations	Level 4	NQF Level 04	Reregistered	2021-06-30	As per Learning Programmes recorded against this Qual

And others as listed in the SAQA unit standard document

Learner Signature	Date

10322

SOUTH AFRICAN QUALIFICATIONS AUTHORITY
REGISTERED UNIT STANDARD:
Retrieve and correlate statistical data applicable to Contact Centres

SAQA US ID	UNIT STANDARD TITLE			
10322	Retrieve and correlate statistical data applicable to Contact Centres			
ORIGINATOR				
SGB Marketing				
PRIMARY OR DELEGATED QUALITY ASSURANCE FUNCTIONARY				
-				
FIELD			**SUBFIELD**	
Field 03 - Business, Commerce and Management Studies			Marketing	
ABET BAND	**UNIT STANDARD TYPE**	**PRE-2009 NQF LEVEL**	**NQF LEVEL**	**CREDITS**
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2024-06-30		2027-06-30		

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PURPOSE OF THE UNIT STANDARD

This unit standard forms part of the qualification, National Certificate in Contact Centre Operations NQF Level 4. Learners working towards this unit standard will be learning towards the full qualification, or will be working within a Contact Centre environment, where the acquisition of competence against this standard will add value to learner's job. This unit standard is intended to enhance the provision of intermediate level service within the Contact Centre industry.

The qualifying learner is capable of:
- Retrieving statistical data.
- Correlating statistical data.

LEARNING ASSUMED TO BE IN PLACE AND RECOGNITION OF PRIOR LEARNING

- Learners accessing this unit standard or qualification will have demonstrated competency against unit standards in Contact Centres at NQF Level 2 or equivalent.
- Learners are expected to have demonstrated competency in language, numeracy, literacy and communication at NQF Level 4 or equivalent.

Learner Signature	Date

UNIT STANDARD RANGE

- Statistical data is any data specific to performance inputs and outputs within a Contact Centre context and will apply to data in an in-bound and out-bound context.
- This standard applies to Contact Centres that are in-bound and/or out-bound within a commercial or emergency context and will include appropriate subject matter in the area in which the learner chooses to operate.

Specific Outcomes and Assessment Criteria:

SPECIFIC OUTCOME 1

Retrieve statistical data.

ASSESSMENT CRITERIA

ASSESSMENT CRITERION 1

1. Statistical data is accurate in terms of the identified demands of the Contact Centre.

ASSESSMENT CRITERION 2

2. Data collected is relevant in terms of the intended purpose.

ASSESSMENT CRITERION 3

3. Data is retrieved systematically.

ASSESSMENT CRITERION 4

4. Data is collected within company specific timeframes.

SPECIFIC OUTCOME 2

Correlate statistical data.

ASSESSMENT CRITERIA

ASSESSMENT CRITERION 1

1. Data is presented and compared in a logical format according to company specific requirements.

ASSESSMENT CRITERION 2

2. The correlation is presented in a manner, which serves the intended purpose.

ASSESSMENT CRITERION 3

3. Data correlated is completed within company specific timeframes.

UNIT STANDARD ACCREDITATION AND MODERATION OPTIONS

Learning programmes leading to the acquisition of these credits will be accredited by the relevant Education, Training, Quality Assurance Body (ETQA).

UNIT STANDARD ESSENTIAL EMBEDDED KNOWLEDGE

- A basic understanding of collecting statistical data.
- A general understanding of processing data analytically.
- A general understanding of company specific data collation methodologies.
- A basic understanding of information presentation and collation methods and techniques.
- A general understanding of Contact Centre business and performance requirements.

Critical Cross-field Outcomes (CCFO):

Learner Signature	Date

UNIT STANDARD CCFO ORGANISING

 Organise and manage one's activities responsibly and logically so that information retrieved and correlated is correct.

UNIT STANDARD CCFO COLLECTING

 Collect, analyse, organise and critically evaluate Contact Centre data and statistics.

UNIT STANDARD CCFO COMMUNICATING

 Communicate effectively when presenting statistical data to others.

UNIT STANDARD CCFO SCIENCE

 Use science and technology effectively in order to collect and present statistical Data.

QUALIFICATIONS UTILISING THIS UNIT STANDARD:

ID	QUALIFICATION TITLE	OLD LEVEL	NEW LEVEL	STATUS	END DATE	QUALITY ASSURING BODY
93996	Further Education and Training Certificate: Contact Centre Operations	Level 4	NQF Level 04	Reregistered	2021-06-30	As per Learning Programmes recorded against this Qual

Learner Signature	Date

Pre-Assessment Preparation Sheet

This document serves to orientate and prepare you in the assessment(s) that you are about to embark in. It is a map that informs you of the steps involved in the assessment process and will allow you to prepare for your assessment(s), helping to set you at ease, and give you the best opportunity for success.

This document MUST be completed by the Learner in the presence of the Assessor / Facilitator conducting the Pre-Assessment Process:

Programme	LP6: Contact Centre Service Levels and Statistical Data		
Unit Standards	SAQA ID 10313: Comply with service levels as set out in a Contact Centre operation; NQF Level 4, 10 Credits SAQA ID 10322: Retrieve and correlate statistical data applicable to Contact Centres; NQF Level 4, 12 Credits		
Venue of Pre-Assessment Meeting		**Date**	
Learner Full Name			
Learner ID			
Facilitator Full Name			
Assessor Full Name		**Assessor Number**	
Moderator Full Name		**Moderator Number**	

Please read the discussion points below. Tick yes, indicating that you have read and understand the information provided. Please contact your facilitator or assessor if you do not understand or need additional information on any of the points below:

Please take note of the following discussion points:	**I have read and understand the information provided:**		
	Yes	**No**	**Comments**
1. Were you welcomed and made to feel at ease?			
2. Was the purpose and objectives of the meeting explained?			
3. Was the Assessment process and principles of good assessment is explained?			
4. The purpose of the assessment is to determine and recognise my competence against the unit standards in this qualification			
5. I understand the roles and responsibilities of all parties involved in the assessment: • The learner: To complete and submit all required evidence by submission date. • The assessor: To assess evidence submitted and provide learner with feedback. • The moderator: To quality assure the assessment process. Assessment results are subject to change pending moderation.			
6. Were you informed of your rights, appeal process and reassessment policies? • You have the right to appeal against any judgement given as a result of any assessment. You must have valid reasons for doing this • You have the right to an interpreter if you need one to perform this function. However if one of the learning assumptions for the standard is that you are competent within the language of			

Learner Signature	Date

Please take note of the following discussion points:	I have read and understand the information provided:		
	Yes	No	Comments
assessment, you may not have an interpreter • You can ask that an impartial observer attend any assessment. This observer may not take any part of the assessment • If you do not agree with the assessment you have the right to have your assessment internally moderated. If you still do not agree with the result of the assessment you can ask that the ETQA perform an external moderated on the assessment. If any verification upholds the assessment findings you will be held liable for all costs of the verifications. If any verification rules that you have been aggrieved as a result of the assessment, your assessor will be liable for all costs of verification			
7. I will communicate any special or particular needs that may affect my performance during the assessment to my Assessor 15 working days before the submission date. • Special and particular needs, i.e. disabilities, language and literacy needs. • Special needs will be provided for as long as the validity of the assessment is not compromised.			
8. This PoE (Portfolio of Evidence) contains the following Assessment Instruments that have to be completed and submitted for every Skills Programme: • Learner Workbook (Formative Assessment) • Reflection • Knowledge questions (Summative Assessment) • Practical assignments • Witness Testimony • Logbook Note: The assessor can be contacted with any questions regarding the assessment.			
9. I am aware that all evidence has to be: • Valid (evidence provided will speak to the unit standard) • Authentic (all evidence submitted will be my own work, I will indicate where this is not the case. If it found that I am guilty of plagiarism, I will have to apply to be assessed again and pay the bearing associated assessment costs) • Reliable (evidence is from a reliable source) • Current (evidence can not be older than 3 years) • Sufficient (prove consistent competence – not a “once-off” occurrence)			
10. I know that I have to complete all sections of this PoE and sign all sections where requested.			
11. The assessor will evaluate the evidence submitted in my PoE against the Unit Standard Specific Outcomes with their associated Assessment Criteria, Essential Embedded Knowledge and CCFOs that is outlined in the Unit Standards related to this Skills Programme in the qualification.			
12. The submission date of the PoE has been communicated to me *(fill in date on the right hand side here)* • No late submissions will be accepted. An extension request has to be submitted 5 working days prior to the agreed submission date. • We reserve the right to charge an admin fee to process extension requests. • I will make a copy of the PoE before submission and retain for safekeeping. • I accept the consequences of my actions should I not have retained			**Date**:

Learner Signature	Date

Please take note of the following discussion points:	I have read and understand the information provided:		
	Yes	No	Comments
a copy of my PoE and the document is lost or destroyed as a result off circumstances beyond the control of the training provider.			
13. The Assessor will provide feedback no later than 1 month after the submission date. • Assessment results are communicated via e-mail. • Feedback is confidential. • The assessor can be contacted to clarify feedback received.			
14. If the assessor identifies evidence requirements that I have not met: • One opportunity for re-assessment is included in the assessment price. • Should the assessment result remain unchanged upon re-submission, the action plan will be discussed. • Once areas of remediation have been addressed, the learner can re-apply for assessment, bearing the associated assessment costs.			
15. I understand the appeals policy: • I have read and signed the Appeals Policy and Procedure in this PoE			
16. I understand the recordkeeping and reporting of results: • All learner records are confidential. • The company sponsoring your training will have access to Assessment results. • Assessment results are communicated to the ETQA who will upload learner results to the National Learner Record Database.			

Declaration of Understanding statement:	Yes / No
1. I understand the importance of the meeting / workshop	
2. I declare that the above mentioned points of the pre-assessment document were explained by the Assessor/Trainer	
3. I declare that I have received copies of the qualification, assessment plan, assessment schedule and copies of the relevant policies and procedures pertaining to my assessment	
4. I have read the above and understood the contents thereof	
5. I was given the opportunity to clarify any issues relating to the assessment process and my assessment plan	
6. I have requested this assessment in accordance with my own free will and without duress	

Learner Signature		**Date**	
Facilitator Signature		**Date**	
Assessor Signature		**Date**	
Moderator Signature		**Date**	

Assessment Plan

Use the assessment plan to write down the dates on which you plan to meet specific targets. This document MUST be completed by the learner in the presence of the Assessor / Facilitator conducting the Pre-Assessment Process:

Programme	LP6: Contact Centre Service Levels and Statistical Data		
Unit Standards	SAQA ID 10313: Comply with service levels as set out in a Contact Centre operation; NQF Level 4, 10 Credits SAQA ID 10322: Retrieve and correlate statistical data applicable to Contact Centres; NQF Level 4, 12 Credits		
Learner Name			
Learner ID Number			
Facilitator Name			
Assessor Name		**Assessor ID**	

Action	**Planned Date**	**Actual Date**	**Comments**
1. Read and Sign Assessment Preparation Sheet			
2. Complete the formative assessments – class activities in the Learner Workbook			
3. Complete the Reflection in the Learner Workbook			
4. Place the entire Learner Workbook in the PoE			
5. Complete the summative assessment activities in the Learner Portfolio of Evidence Guide: a. Knowledge Questionnaire			
b. Practical Activities			
c. Witness Testimony			
d. Logbook			
6. Complete the Assessment Activities Checklist in the Learner Portfolio of Evidence Guide			
7. Submit the PoE			

I, the learner, hereby agree to the above plan and to commit to preparing for the assessment and submitting the specified documents (in my Portfolio of Evidence) on the dates specified.

Learner Signature		**Date**	
Facilitator Signature		**Date**	
Assessor Signature		**Date**	
Moderator Signature		**Date**	

Learner Signature	Date

Declaration of Authenticity

I _____ *(full name)*, ID number _____

declare that the evidence (the work and natural occurring) presented in this portfolio was completed by me and is my own, against the Unit Standards in this Programme:

Programme	LP6: Contact Centre Service Levels and Statistical Data
Unit Standard	SAQA ID 10313: Comply with service levels as set out in a Contact Centre operation; NQF Level 4, 10 Credits SAQA ID 10322: Retrieve and correlate statistical data applicable to Contact Centres; NQF Level 4, 12 Credits

with the exception of:

(detail any work that was not completed by yourself, i.e. group work, etc.)

Where assistance or advice was received, or where I used resource material form a Learner Guide, workbook, policy wording, internet or any other printed sources, this is acknowledged and referenced below: (*please list references here*):

I further declare that I understand that plagiarism is a punishable offence as it constitutes the theft of another's intellectual property rights.

In signing this, I declare that all the evidence presented in this Portfolio of Evidence is true, valid and my own work:

Learner signature			
Date			
Witness name			
Witness contact details			
Witness signature			
Assessor signature		**Moderator signature**	

Learner Signature	Date

Appeals Procedure

Familiarise yourself with the appeals procedure and sign the document as requested. You will only use the Appeals Form if you would like to appeal against the assessment decision.

The Training Provider acknowledges a Learner's right to appeal against or dispute any assessment decision.

You can appeal under the following circumstances:

- I do not agree with my assessment decision – I feel I have provided sufficient evidence
- I was not briefed properly of the nature and requirements of assessment
- I was unfairly discriminated against
- My special needs for this assessment were not accommodated

If you would like to appeal, please follow the procedure below:

Stage 1:

- Approach the workshop organiser to state your case for re-assessment within 14 working days of being informed of the assessment decision. Complete and submit the appeals form within the 14 days.
- The Training Provider will respond to all appeals and disputes received within 14 working days.
- The workshop organiser will consider the appeal and forward to the assessor if required.
- The assessor will respond with either:
  - A clear explanation stating why the assessment decision is upheld combined with a re-evaluation of the evidence.
  - An amendment of the Learner's Assessment Record, should this be appropriate.

Stage 2:

- Should the decision made by the assessor be unsatisfactory, the appeal will be forwarded to the moderator for mediation and possible re-assessment.

Stage 3:

- The Training Provider management would be approached as the next step, should the decision not be accepted. A panel will be selected to administer the appeal.
- The Learner is invited to attend the proceedings held by the panel.

Stage 4:

- Once all internal appeals and dispute systems have been exhausted, appeals and disputes can be referred to the relevant ETQA for investigation.

Declaration: I hereby confirm that the above procedures have been explained to me and I accept them.

Learner Name: _____ Signature: _____ Date: _____.

Learner Signature	Date

Appeals Form

CONDITION/S UNDER WHICH I AM SELECTING TO MAKE THIS APPEAL (select one)

- I do not agree with my assessment decision – I feel I have provided sufficient evidence
- I was not briefed properly of the nature and requirements of assessment
- I was unfairly discriminated against
- My special needs for this assessment were not accommodated

I _____ hereby appeal against the assessment decision:
(name & surname)

Training Provider			
Skills Programme			
Unit Standard(s)			
Assessor		**Assessment Date**	
Reason for appeal			

Learner Signature _____ Date of Appeal _____

Stage 1: Assessor Response			
Decision Amended		Decision Upheld	
Assessor's rationale for decision			
Assessor Signature		Date of Response	

The above decision have been explained to me and I accept the decision YES ☐ NO ☐

Learner Signature _____ Date _____

Stage 2: Moderator Response			
Decision Amended		Decision Upheld	
Moderator's rationale for decision			
Moderator Name		Date of Response	
Moderator Signature			

The above decision have been explained to me and I accept the decision YES ☐ NO ☐

Learner Signature _____ Date _____

Stage 3: Management Response			
Decision Amended		Decision Upheld	
Rationale for decision			
Panel		Date of Response	
Name		Signature	
Name		Signature	
Name		Signature	

The above decision have been explained to me and I accept the decision YES ☐ NO ☐

Learner Signature _____ Date _____

Stage 4: ETQA	The appeal has been referred for investigation	YES ☐	NO ☐

Learner Signature	Date

Formative Assessment

"*Formative Assessment refers to assessment that takes place during the process of learning and teaching*"
(SAQA: Criteria and Guidelines for Assessment Policy Document, pg 26)

Please place the entire contents of your Learner Workbook here, so that it can be assessed as your formative assessment:

- Learner Workbook with Class Activities completed

During and after the initial training the learner will be required to complete a number of class activities. These activities will be both individual and group activities (class activities - formative). The activities are numbered and are to be included in the learner's portfolio of evidence. These activities will measure the progress of the learner through the programme. For authenticity reasons these activities must be handwritten.

Learner Signature	Date

Learner Workbook

Please **insert your entire Learner Workbook**, with all the Class Activities here.

- Ensure that all the Class Activities are completed, including the Reflection activity.

Learner Signature	Date

Summative Assessment

"*Summative Assessment is assessment for making a judgement about achievement. This is carried out when a learner is ready to be assessed at the end of a programme of learning*"

(SAQA: Criteria and Guidelines for Assessment Policy Document, pg 26)

Please complete the following summative assessment activities and submit as part of your Portfolio of Evidence:

- Knowledge Questions
- Practical Activities
- Witness Testimony
- Logbook

The learner needs to individually complete the summative assessment activities. The summative assessment is conducted by means of a knowledge questionnaire and various integrated assessment activities. The learner needs to follow the summative assessment activity instructions to create the evidence required for the portfolio of evidence.

Note: The Critical Cross Field Outcomes are referenced in the following manner:

CCFO1- Identify and solve problems in which responses demonstrate that responsible decisions using critical and creative thinking have been made

CCFO2- Work effectively with others as a member of a team, group, organisation, community

CCFO3- Organise and manage oneself and one's activities responsibly and effectively

CCFO4- Collect, analyse, organise and critically evaluate information

CCFO5- Communicate effectively using visual, mathematical and/or language skills in the modes of oral and/or written presentation

CCFO6- Use science and technology effectively and critically, showing responsibility towards the environment and health of others

CCFO7- Demonstrate an understanding of the world as a set of related systems by recognising that problem-solving contexts do not exist in isolation

CCFO8- Be culturally sensitive across a range of social contexts so that all actions and decisions made are acceptable to all stakeholders with broad cultural backgrounds

Learner Signature	Date

Knowledge Questions

Please answer the following knowledge questions related to the unit standard embedded knowledge and assessment criteria and place it in your portfolio of evidence. Remember to number the answers according to the question numbers, should you need to attach a document.

You have to complete this Knowledge Questionnaire **individually** based on the theory that you covered in your Learner Guide and the formative assessments you completed in your Learner Workbook.

	Knowledge Questions Individually complete the following:	**Unit Standard Reference**
1.	What Microsoft software would you use when you have to analyse and manipulate statistics?	10313 EEK1
		(1)
2.	List any five Contact Centre products or technologies that are essential	10313 EEK2
		(5x2=10)
3.	What does a Service Level measure?	10313 EEK3 10313.1.1
		(3)
4.	List any 5 of the top 10 KPIs and metrics customers use to monitor their performance	10313.1.2
		(5x2=10)

Learner Signature	Date

5. What are the Management Information Systems used for? (List any two)	10313 EEK4
(2)	
6. List three categories of Call Centre Data	10322 EEK1
(3)	
7. What is Data Mining?	10322 EEK2
(4)	
8. How does collation differ from classification?	10322 EEK3
(3)	
9. List any four benefits of using a dashboard	10322 EEK4
(4x2=8)	

Learner Signature	Date

10. Provide the industry standard metrics for the following Call centre measures	10322 EEK5

Average call wait time:	
% of calls answered within the average call wait time:	
Call drop rate:	
Agent availability:	
First call resolution:	
% of time spend on calls:	
Average call duration:	
Staff turnover:	

(8x2=16)

Total	**/ 60**

Assessor signature		**Moderator signature**	

Learner Signature	Date

Practical Activities

Individually complete the following activities to show your ability to integrate and apply your knowledge and skills in the workplace.

	Practical Activity 1: Contact Centre Service Levels and Statistical Data Individually complete the following:	10313. 10322. Related EEKs CCFO2-8 ELO1, 6

You need to show that you can:

- Comply with service levels as set out in a Contact Centre operation
- Retrieve and correlate statistical data applicable to Contact Centres

Complete the following in your workplace:

1. **Comply with service levels as set out in a Contact Centre operation**. Complete the following tasks and provide workplace evidence to show that you have done the following:
    a. Submit an organisational document containing service levels relevant to your job
    b. Submit an organisational document containing service levels relevant to the job of a call centre agent
    c. Provide documentary evidence that you have implemented relevant company specific levels
    d. Provide documentary evidence that you have monitored implementation processes to ensure compliance
    e. Provide documentary evidence that you have consistently met service level timeframes and targets as per company specific requirements
    f. Provide documentary evidence that you have identified and evaluated potential constraints in meeting and maintaining service levels

2. **Retrieve and correlate statistical data applicable to Contact Centres**. Complete the following tasks and provide workplace evidence to show that you have done the following:
    a. Submit a document displaying data that you have collected in the course of your job.
    b. Submit a report showing data that you have retrieved from other sources of data
    c. Submit a document (e.g. a report to management) in which you present and compare data in a logical format according to company specific requirements

Learner Signature	Date

3. **Request your supervisor to provide you with written feedback** about how you completed the above tasks in this practical activity. Your supervisor needs to complete the feedback document by entering either Yes or No in the column provided and then provide comments to substantiate their rating:

Learner Name		**Date**	

• Demonstrate an understanding of company specific service levels • Meet and maintain service levels • Retrieve statistical data • Correlate statistical data **Did the learner:**	**Yes/No**	**Comments**
1. Demonstrate an understanding of the purpose and requirements of all relevant service levels?		
2. Implement relevant company specific levels?		
3. Monitor implementation processes to ensure compliance?		
4. Consistently meet service level timeframes and targets as per company specific requirements?		
5. Identify and evaluate potential constraints in meeting and maintaining service levels?		
6. Ensure that statistical data is accurate in terms of the identified demands of the Contact Centre?		
7. Ensure that data collected is relevant in terms of the intended purpose?		
8. Retrieve data systematically?		
9. Collect data within company specific timeframes?		
10. Present and compare data in a logical format according to company specific requirements?		
11. Present the correlation in a manner, which serves the intended purpose?		
12. Complete the data correlation within company specific timeframes?		

Supervisor Signature	
Supervisor Name	
Supervisor Designation	
Supervisor Contact Details	

Learner Signature	Date

Remember:

Provide workplace evidence to support your answers and show your ability to do what is required of you in this activity.

It is the learner's responsibility to obtain permission from his/her manager to submit the evidence required in this Practical Activity

Place your evidence after this page; clearly marked for easy reference.

Practical Activity Checklist

Please tick that you have submitted the following evidence as per the instructions above:

Learner Name		**Date**	

Practical Activity 1	**Submitted Yes/No**	**Name of my document / Comments**
Comply with service levels as set out in a Contact Centre operation		
a. Submit an organisational document containing service levels relevant to your job Check: Service levels include but are not limited to management, information systems, information on systems and wall boards, sign on time, abandoned rate etc., shift changes		10313.1.3
b. Submit an organisational document containing service levels relevant to the job of a call centre agent Check: Service levels include but are not limited to management, information systems, information on systems and wall boards, sign on time, abandoned rate etc., shift changes		10313.1.3
c. Provide documentary evidence that you have implemented relevant company specific levels		10313.2.1
d. Provide documentary evidence that you have monitored implementation processes to ensure compliance		10313.2.2
e. Provide documentary evidence that you have consistently met service level timeframes and targets as per company specific requirements		10313.2.3
f. Provide documentary evidence that you have identified and evaluated potential constraints in meeting and maintaining service levels		10313.2.4
Retrieve and correlate statistical data applicable to Contact Centres		
a. Submit a document displaying data that you have collected in the course of your job.		10322.1.1-4

Learner Signature	Date

Practical Activity 1	Submitted Yes/No	Name of my document / Comments
b. Submit a report showing data that you have retrieved from other sources of data		10322.1.3
c. Submit a document (e.g. a report to management) in which you present and compare data in a logical format according to company specific requirements		10322.2.1-3
Supervisor checklist		
a. Completed checklist		10313.1-2 10322.1-2

Learner Signature			
Assessor Signature		**Date**	
Moderator Signature		**Date**	

Witness Testimony

	In the workplace, you need to show your ability to integrate what you have learnt. This can be measured with the Specific Outcomes and the Critical Cross Field Outcomes of the Unit Standard.

Request your supervisor (or workplace mentor) to complete the following form to show that you are able to integrate your learning into everyday workplace application. It is necessary that the supervisor also provides a short comment on the form:

Learner Name		**Date**	

Did the Learner:	**Yes**	**No**
1. Demonstrate an understanding of company specific service levels?		
2. Meet and maintain service levels?		
3. Retrieve statistical data?		
4. Correlate statistical data?		
5. Work effectively with others as a member of a team, group, organisation, community?		
6. Organise and manage oneself and one's activities responsibly and effectively?		
7. Collect, analyse, organise and critically evaluate information?		
8. Communicate effectively using visual, mathematical and/or language skills in the modes of oral and/or written presentation?		
9. Use science and technology effectively and critically, showing responsibility towards the environment and health of others?		
10. Demonstrate an understanding of the world as a set of related systems by recognising that problem-solving contexts do not exist in isolation?		
11. Be culturally sensitive across a range of social contexts so that all actions and decisions made are acceptable to all stakeholders with broad cultural backgrounds?		

Comments about how the learner applied the knowledge and skills in this programme:

Supervisor Name:			
Supervisor Signature:			
Supervisor Designation:			
Supervisor Contact Details:			
Learner Signature:			
Assessor Signature		**Date**	
Moderator Signature		**Date**	

Learner Signature	Date

Logbook

Complete this individually in your workplace. This logbook has been included to record all the time spent on learning and preparation for the assessment and other activities related to this programme:

- Time spent in class (training)
- Time spent completing a task / activity should be signed off by a supervisor, mentor or witness where possible.
- Time spent applying the new knowledge and skills
- The logbook should show that the learner has spent at least **220 hours** in acquiring the required knowledge and skills of this programme, including tasks related to the following:
    - Demonstrate an understanding of company specific service levels
    - Meet and maintain service levels
    - Retrieve statistical data
    - Correlate statistical data

Learner Name	
Skills Programme	LP6: Contact Centre Service Levels and Statistical Data
Unit Standards	SAQA ID 10313: Comply with service levels as set out in a Contact Centre operation; NQF Level 4, 10 Credits SAQA ID 10322: Retrieve and correlate statistical data applicable to Contact Centres; NQF Level 4, 12 Credits

Activity	**Start Date**	**Number of Hours**	**Running Total No. of Hours**	**Sign Off by Supervisor / Manager / Mentor / Witness**		
				Name & Surname	**Relationship to Learner**	**Signature**
Identify and record all relevant service levels						
Provide a written explanation of the purpose of service levels						
List, describe and explain, in writing, the requirements of all relevant service levels						
Explain to your supervisor how you will implement the relevant company specific levels						
Create a checklist in order to monitor the implementation processes for compliance						
Diarise service level timeframes and targets as per company specific requirements						
Create and complete a task list to ensure service level timeframes and targets are consistently met						
Identify and provide a written evaluation on the						

Learner Signature	Date

Activity	Start Date	Number of Hours	Running Total No. of Hours	Sign Off by Supervisor / Manager / Mentor / Witness		
				Name & Surname	Relationship to Learner	Signature
potential constraints in meeting and maintaining service levels						
Compile accurate statistical data in terms of the identified demands of the Contact Centre						
Ask your supervisor if the data collected is relevant in terms of the intended purpose						
Retrieve and record data systematically						
Collect data within company specific timeframes						
Compare data in a logical format according to company specific requirements and present it to your supervisor						
Present the correlation in a manner, which serves the intended purpose						
Complete the data correlation within company specific timeframes						

Learner Signature	Date

Activity	Start Date	Number of Hours	Running Total No. of Hours	Sign Off by Supervisor / Manager / Mentor / Witness		
				Name & Surname	Relationship to Learner	Signature

Learner Signature	Date

Activity	Start Date	Number of Hours	Running Total No. of Hours	Sign Off by Supervisor / Manager / Mentor / Witness		
				Name & Surname	Relationship to Learner	Signature

Assessor signature		**Date**		**Moderator signature**		**Date**	

Assessment Activities Checklist

The learner needs to complete all the required activities that are guided by the Specific Outcomes and Assessment criteria of the Unit Standard(s) in this skills programme:

Programme	LP6: Contact Centre Service Levels and Statistical Data
Unit Standards	SAQA ID 10313: Comply with service levels as set out in a Contact Centre operation; NQF Level 4, 10 Credits SAQA ID 10322: Retrieve and correlate statistical data applicable to Contact Centres; NQF Level 4, 12 Credits

Once you have completed all the assessment activities, request your supervisor to check that you have completed all the required activities and that they have all been placed in your Portfolio of Evidence, in the following order:

Did the learner provide the required evidence:	**Reference:**	**Comments / Feedback**	**Yes**	**No**
Formative – Class Activities				
Class Activity 1	10313.1 10313 EEK1 10313 EEK3 10313 EEK4			
Class Activity 2	10313.2 10313 EEK2			
Class Activity 3	10322.1 10322 EEK1 10322 EEK3 10322 EEK4 10322 EEK5			
Class Activity 4	10322.2 10322 EEK2 10322 EEK4			
Reflection	10313 10322			
Facilitator Observation Checklist	10313 10322			
Summative - Knowledge Questions				
Question 1	10313 EEK1			
Question 2	10313 EEK2			
Question 3	10313 EEK3 10313.1.1			
Question 4	10313.1.2			

Learner Signature	Date

Did the learner provide the required evidence:	Reference:	Comments / Feedback	Yes	No
Question 5	10313 EEK4			
Question 6	10322 EEK1			
Question 7	10322 EEK2			
Question 8	10322 EEK3			
Question 9	10322 EEK4			
Question 10	10322 EEK5			
Summative – Practical Activities				
Practical Activity 1	10313. 10322. Related EEKs CCFO2-8 ELO1, 6	As per the Practical Activity 1 Checklist:		
Summative – Witness Testimony				
Witness Testimony 1	10313 10322			
Summative – Logbook				
Logbook	10313 10322			

Learner Name:	
Learner Signature:	
Date:	
Supervisor Name:	
Supervisor Signature:	
Supervisor Designation:	
Supervisor Contact Details:	
Assessor Signature	
Moderator Signature	

Learner Signature	Date

Learner Re-assessment Plan

Should it happen that a learner is deemed Not Yet Competent on assessment the learner will be allowed to be re-assessed. The learner can, however, only be allowed three reassessments – as per the training provider's Assessment Policy.

All assessment decisions will be recorded on the Assessment Feedback Document, which all parties sign.

When learners have to undergo re-assessment, the following conditions will apply:

- Specific feedback will be given to the learners in the Assessment Feedback Document so that the learner can concentrate only on those areas in which they were assessed as Not Yet Competent
- Re-assessment will take place in the same situation / context and under the same conditions as the original assessment
- Only the assessment criteria that were not achieved will be re-assessed

Learner Signature	Date

Re-Assessment Preparation Sheet

This document serves to orientate and prepare you in the re-assessment(s) that you are about to embark in. It is a map that informs you of the steps involved in the assessment process and will allow you to prepare for your assessment(s), helping to set you at ease, and give you the best opportunity for success.

Programme	LP6: Contact Centre Service Levels and Statistical Data		
Qualification	SAQA ID 10313: Comply with service levels as set out in a Contact Centre operation; NQF Level 4, 10 Credits SAQA ID 10322: Retrieve and correlate statistical data applicable to Contact Centres; NQF Level 4, 12 Credits		
Venue of Re-Assessment Meeting		**Date**	
Learner Full Name			
Learner ID			
Facilitator Full Name			
Assessor Full Name		**Assessor Number**	
Moderator Full Name		**Moderator Number**	

Please read the discussion points below. Tick yes, indicating that you have read and understand the information provided. Please contact your facilitator or assessor if you do not understand or need additional information on any of the points below:

Please take note of the following discussion points:	**I have read and understand the information provided:**		
	Yes	**No**	**Comments**
1. The purpose of the re-assessment is to determine and recognise my competence against the unit standards in this qualification, that I have not met at this point in time			
2. You will be provided with a copy of the Assessment Feedback document in which the assessor provides specific feedback about the areas in which you were assessed as Not Yet Competent: • I understand that there is additional evidence I need to submit for remediation			
3. I am aware that all evidence has to be: • Valid (evidence provided will speak to the unit standard) • Authentic (all evidence submitted will be my own work, I will indicate where this is not the case. If it found that I am guilty of plagiarism, I will have to apply to be assessed again and pay the bearing associated assessment costs) • Reliable (evidence is from a reliable source) • Current (evidence cannot be older than 3 years) • Sufficient (prove consistent competence – not a “once-off” occurrence)			
4. The re-submission date of the remediation evidence is communicated to me on the Assessment Feedback document • No late submissions will be accepted. An extension request has to be submitted 5 working days prior to the agreed submission date. • We reserve the right to charge an admin fee to process extension			

Learner Signature	Date

Please take note of the following discussion points:	I have read and understand the information provided:		
	Yes	No	Comments
requests. • I will make a copy of the remediation evidence before submission and retain for safekeeping. • I accept the consequences of my actions should I not have retained a copy of my PoE and the document is lost or destroyed as a result off circumstances beyond the control of the training provider.			
5. The assessor will evaluate the remediation evidence submitted in my PoE against the Unit Standard Specific Outcomes with their associated Assessment Criteria, Essential Embedded Knowledge and CCFOs that is outlined in the Unit Standards related to this Skills Programme in the qualification.			
6. The Assessor will provide feedback no later than 1 month after the submission date. • Assessment results are communicated to the learner. • Feedback is confidential. • The assessor can be contacted to clarify feedback received.			
7. If the assessor identifies evidence requirements that I have not met: • One further opportunity for re-assessment is provided for (3 assessments in total) • Should the assessment result remain unchanged upon re-submission, the action plan will be discussed with me, the learner.			
8. Were you informed of your rights, appeal process and reassessment policies?			
9. I understand the appeals policy: • I have read and signed the Appeals Policy and Procedure in this PoE			

Declaration of Understanding statement:	Yes / No
1. I understand the importance of the meeting / workshop	
2. I declare that the above mentioned points of the re-assessment document were explained by the Assessor/Trainer and that I have read the above and understood the contents thereof	
3. I declare that I will receive feedback on my PoE that has been assessed and that I will be able to clarify what additional evidence is required for remediation in this re-assessment process	
4. I understand that I will request this re-assessment in accordance with my own free will and without duress	

Learner Signature		**Date**	
Facilitator Signature		**Date**	
Assessor Signature		**Date**	
Moderator Signature		**Date**	

Learner Signature	Date

Learner's Review of the Assessment Process

You, the learner, will be given the same document as below to complete in the Assessor Assessment Feedback document, once your first assessment has been completed. The document provides you with the opportunity to provide feedback to the training provider about the assessment process that you have gone through:

Programme	LP6: Contact Centre Service Levels and Statistical Data
Unit Standards	SAQA ID 10313: Comply with service levels as set out in a Contact Centre operation; NQF Level 4, 10 Credits SAQA ID 10322: Retrieve and correlate statistical data applicable to Contact Centres; NQF Level 4, 12 Credits
Assessor	
Learner	
Date	

Review Dimensions	**Agree**	**Disagree**
1. The assessment related to the registered unit standard		
2. The assessment was practical		
3. The assessment was time efficient and cost effective and did not interfere with my normal responsibilities		
4. The assessment instruments and judgements were fair, clear and understandable		
5. My special needs, if any, were identified and the assessment plan was adjusted (if required)		
6. The feedback that I received was constructive, even when I requested assistance		
7. I was made aware of the opportunity to appeal against the outcome of the assessment		
8. Did you find any parts of the Learner Workbook and Learner Portfolio Guide particularly helpful?		
9. Did you find any parts of the Learner Workbook and Learner Portfolio Guide particularly awkward or difficult to understand?		

Learner's declaration of understanding

I am aware that the assessor will provide me with feedback about the assessment and of the moderation process and understand that the moderator could declare the assessment decision invalid.

Learner	**Date**	**Assessor**	**Date**	**Moderator**	**Date**

Thank you for taking the time to complete this evaluation form.

Learner Signature	Date

Learner Programme Evaluation

The training provider will provide you, the learner, with a programme evaluation form, similar to the one below to gather feedback from you about the entire learning process that you have undergone. Please confirm with the facilitator, which form you will be completing:

Programme:	LP6: Contact Centre Service Levels and Statistical Data				
Unit Standards:	SAQA ID 10313: Comply with service levels as set out in a Contact Centre operation; NQF Level 4, 10 Credits SAQA ID 10322: Retrieve and correlate statistical data applicable to Contact Centres; NQF Level 4, 12 Credits				
Delegate Name:					
Date:		**Duration:**		**Venue:**	
Facilitator's Name:					

Dear Learner
In order to assist us to maintain the relevance and quality of your learning, please complete this reaction sheet and hand it back to your facilitator. Please be honest and make additional comments where possible.
Yours in Learning

Quality Indicator	**Poor**	**Below Average**	**Average**	**Good**	**Excellent**
	= 1	**= 2**	**= 3**	**= 4**	**= 5**

Did the Facilitator…		**Score**
1.	Clearly explain the outcomes of the course	
2.	Present an open and friendly approach towards the learners & made me feel welcome	
3.	Motivate & Encourage learning within the group	
4.	Use activities and training aids during the training making it exciting	
5.	Communicated Effectively and clearly	
Additional Comments:		
	Total	**25**
How was the course Delivered?		
1.	Did you feel the knowledgeable on all of the training outcomes	
2.	There was enough time to practice what I had learnt through activities and exercises	
3.	I received enough useful "support" material (Handouts, checklists, templates, job aids etc.) to assist me back in the workplace	
4.	The trainer was well prepared	
5.	Cover the contents of the learning material adequately and in a logical sequence	
Additional Comments:		
	Total	**25**
Tell us about the Venue & other Logistics?		
1.	Communication of training venue, date and time was received in advance	
2.	Was it well prepared by the facilitator prior to the session	
Additional Comments		
	Total	**10**

Thank you for your feedback!

Learner Signature	Date

Glossary

Assessment	A structured process for gathering evidence and making judgments about an individual's performance in relation to registered, national standards
Assessment Guide	The document sets out what will be assessed, and what evidence needs to be generated
Assessment Plan	Document used to plan the assessment process.
Assessment Process	Incorporates all activities that form part of the assessment.
Coaching	A training method in which an experienced individual guides the learner towards acquiring specific skills.
Competent	Learners are declared competent when they meet the outcomes of the unit standard.
ETQA	The Education Training Quality Assurance Body is responsible for ensuring quality training and development within a specific sector.
Formative Assessment	Refers to the assessment that takes place during the process of learning. The assessment provides an indication of how the learning is progressing. Additional training needs may be identified during the process.
Learnership	A Learnership is a work-based approach to learning and gaining qualifications and includes both structured work experience (practical) and structured learning (theory).
Mentor	A multi-skilled individual who serves as a sponsor, teacher, coach, sounding board and counsellor.
Moderation	A process of review that confirms that processes that have been followed are valid, consistent, fair and adequate.
NQF	The National Qualifications Framework provides a framework for nationally recognised qualifications. Qualifications are assessed according to ten bands.
NYC	Not Yet Competent
OBET	Outcomes Based Education and Training
QMS	Quality Management System
Qualifications	A group of unit standards that have been clustered together to make up a registered qualification. There are 3 types of qualifications on the NQF: certificates (120cr), diplomas (240cr) and degree (360cr).
RPL	A process whereby learners are assessed and given credit for learning that has already taken place within the workplace.
SAQA	South African Qualifications Authority
SDA	Skills Development Act
SDF	Skills Development Facilitator
SETA	Sector Education and Training Authority
SGB	Standards Generating Bodies
Skills Programmes	Occupationally based learning intervention that uses providers to train learners towards the achievement of national unit standards.
SME	Subject Matter Expert
Summative Assessment	Occurs at the end of the learning process. Evidence is gathered and an assessment is made as to whether a learner has met requirements for competence.
Training Providers	Organisations or individuals that provide learning. These include technical colleges, technikons, distance education institutions, universities, private providers or company in-house training divisions.
Unit Standards	A collection of knowledge, skills and attributes in which a candidate must prove competence (in a structured assessment) to gain credit on the NQF.
VACCS	An assessment tool, which asks whether evidence is valid, authentic, current, consistent and sufficient.

Learner Signature	Date