CURRICULUM DESIGN

80566: National Certificate: Contact Centre and Business Process Outsourcing Support
Level 3

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80566 Purpose

The contact centre and/or Business Process Outsourcing industry is increasingly becoming more diverse, complex, and growing at a fast rate both nationally and internationally. Customer service is the key to success in the sector and this demands expert utilisation of technology which handles both basic and complex transactions.

Contact centres and/or Business Process Outsourcing have become key business tools integral to the way organisations achieve their business objectives. Contact centre and/or Business Process Outsourcing is a growing industry requiring career development and progression opportunities.

This qualification is needed to empower entry level employees to deal effectively with the public and to make a meaningful, positive contribution to customer satisfaction and to the image of the organisation.

The qualification is the first in a learning pathway for people working in the call centre and/or BPO environments.

Learners accessing this qualification will be able to work in call centres involving marketing, account management, sales, hospitality, tourism, emergency services, retail, telecommunications, financial services, credit control, etc. The qualification covers the foundational areas of the contact centre and/or Business Process Outsourcing agent's role in the workplace.

On achieving this qualification the learner will be competent in:

- Providing effective customer service in a contact centre and/or Business Process Outsourcing industry.
- Using communication technology in a contact centre.
- Capturing data to track interactions.
- Working effectively as a team member in a group

Articulation

- The qualification articulates vertically with the: ID: 71489, Further Education and Training Certificate: Contact Centre, NQF Level 4.
- This qualification articulates horizontally with the: ID: 48764, National Certificate: Wholesale and Retail Sales Practice, NQF Level 3.

Curriculum design

Target group

This qualification is intended for persons who already work as Contact Centre and/or Business Process Outsourcing agents or who wish to join the contact centre and/or Business Process Outsourcing industry.

The qualification provides an introduction to contact centre and/or Business Process Outsourcing operations. The qualification will equip learners with the underpinning knowledge and skills to be able to supply high quality customer service.
Learners will be provided with competencies to handle both inbound and outbound interactions/traffic, within different types of operations of contact centre and/or Business Process Outsourcing.

The qualification develops skills in the use of various communication channels e.g. telephone, fax, email, internet, intranet, multifunction devices, webchat, SMS and letters. The qualification also develops skills in dealing with walk-in clients. The qualification will also provide learning opportunities in the knowledge and skills required to perform back office processes and tasks. Learners will have the opportunity to learn, develop and practice the skills required to make an effective contribution in a general contact centre and/or Business Process Outsourcing environment.

**Entry requirements**

It is assumed that learners entering this qualification are competent in:

- Communication at NQF Level 2.
- Mathematical Literacy at NQF Level 2.
- Computer Literacy at NQF Level 3.

Competence in a second South African language would be a great advantage.

**Design**

The curriculum was designed around the exit level outcomes and unit standards were grouped according to these.

The learning process starts with the communication fundamentals in order to prepare the learner for the written assignments, report writing as well as doing research.

Numeracy fundamentals are grouped together with the unit standards regarding gathering and processing data, in other words the use and application of statistics.

The elective component is done in throughout the modules as applicable to the exit level outcomes.

Individual unit standards are designed according to the specific outcomes and assessment criteria.

From the table of contents of each learner guide it can be seen that sections in the learner guide are grouped according to the specific outcome, while subheadings represent the assessment criteria and further discussions.

When the table of contents is read together with the PSS document and the unit standard, it becomes clear that the unit standard forms the basis around which the material is developed.

**Integration**

Learning material is presented as loose standing unit standards, grouped together according to exit level outcomes.

Integration takes place as follows:

- Communication fundamentals are automatically assessed throughout the qualification with every task that has to be completed
- Numeracy fundamentals are automatically assessed through the activities for gathering and processing data
Further integration of knowledge and skills are assessed through summative exit level outcomes assessments.

**Formative assessments**

Formative assessments are done as classroom activities. These activities are grouped in a workbook at the end of the learner guides.

Formative assessments are always a combination of the following:

- Knowledge questionnaires to find out how much the learner understands of the content
- Group discussions to expose individual learners to the combined knowledge of the group
- Practical activities including role plays, debates, reports, developing of forms needed, etc.

**Programme strategy**

The programme strategy and alignment matrix is presented as a programme structure and strategy document, which forms part of the Seta alignment matrix.

This document gives an overview of how facilitation should take place and the timeframes for each section of material. It also indicates where in the learner guide the SO, AC EEK and CCFO are covered.

It also guides the facilitator regarding the method of facilitation, time frames and formative and summative assessment activities.

As mentioned, the PSS document clearly states where SO and AC are tested in formative and summative assessment activities.

Formative assessments always allow for assessment of all AC in order to assist the facilitator and learner to determine the readiness of the learner for summative assessment.

Provision is made in the Learner assessment guide for inclusion of the formative assessment workbooks as part of the proof needed for final judgement of competence.

**Final summative assessments**

The material is presented with two options:

**As a full qualification**

The material is presented as individual unit standards, grouped together in modules according to exit level outcomes

Together with this, the learner then has to complete summative assessments based on the exit level outcomes of the qualification.

In this case the individual summative assessments based on unit standards will not be used.

**As skills programmes**

The material is presented as individual unit standards, grouped together in modules according to exit level outcomes.

Together with this, the learner has to complete summative assessments based on individual unit standards.
In this case, the final summative assessment based on exit level outcomes is ignored.

Learner support, roles and responsibilities

This is stated in every learner guide as stated below.

INTRODUCTION

Welcome to the learning programme

Follow along in the guide as the training practitioner takes you through the material. Make notes and sketches that will help you to understand and remember what you have learnt. Take notes and share information with your colleagues. Important and relevant information and skills are transferred by sharing!

This learning programme is divided into sections. Each section is preceded by a description of the required outcomes and assessment criteria as contained in the unit standards specified by the South African Qualifications Authority. These descriptions will define what you have to know and be able to do in order to be awarded the credits attached to this learning programme. These credits are regarded as building blocks towards achieving a National Qualification upon successful assessment and can never be taken away from you!
Programme Methodology

The programme methodology includes facilitator presentations, readings, individual activities, group discussions and skill application exercises.

Know what you want to get out of the programme from the beginning and start applying your new skills immediately. Participate as much as possible so that the learning will be interactive and stimulating.

The following principles were applied in designing the course:

- Because the course is designed to maximise interactive learning, you are encouraged and required to participate fully during the group exercises.
- As a learner you will be presented with numerous problems and will be required to fully apply your mind to finding solutions to problems before being presented with the course presenter’s solutions to the problems.
- Through participation and interaction the learners can learn as much from each other as they do from the course presenter.
- Although learners attending the course may have varied degrees of experience in the subject matter, the course is designed to ensure that all delegates complete the course with the same level of understanding.
- Because reflection forms an important component of adult learning, some learning resources will be followed by a self-assessment which is designed so that the learner will reflect on the material just completed.

This approach to course construction will ensure that learners first apply their minds to finding solutions to problems before the answers are provided, which will then maximise the learning process which is further strengthened by reflecting on the material covered by means of the self-assessments.

Different role players in delivery process

- Learner
- Facilitator
- Assessor
- Moderator
What Learning Material You Should Have

This learning material has also been designed to provide the learner with a comprehensive reference guide.

It is important that you take responsibility for your own learning process; this includes taking care of your learner material. You should at all times have the following material with you:

<table>
<thead>
<tr>
<th>Learner Guide</th>
<th>This learner guide is your valuable possession:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>This is your textbook and reference material, which provides you with all the information you will require to meet the exit level outcomes.</td>
</tr>
<tr>
<td></td>
<td>During contact sessions, your facilitator will use this guide and will facilitate the learning process. During contact sessions a variety of activities will assist you to gain knowledge and skills.</td>
</tr>
<tr>
<td></td>
<td>Follow along in the guide as the training practitioner takes you through the material. Make notes and sketches that will help you to understand and remember what you have learnt. Take and share information with your colleagues. Important and relevant information and skills are transferred by sharing!</td>
</tr>
<tr>
<td></td>
<td>This learning programme is divided into sections. Each section is preceded by a description of the required outcomes and assessment criteria as contained in the unit standards specified by the South African Qualifications Authority. These descriptions will define what you have to know and be able to do in order to be awarded the credits attached to this learning programme. These credits are regarded as building blocks towards achieving a National Qualification upon successful assessment and can never be taken away from you!</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Formative Assessment Workbook</th>
<th>The Formative Assessment Workbook supports the Learner Guide and assists you in applying what you have learnt.</th>
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<tbody>
<tr>
<td></td>
<td>The formative assessment workbook contains classroom activities that you have to complete in the classroom, during contact sessions either in groups or individually.</td>
</tr>
<tr>
<td></td>
<td>You are required to complete all activities in the Formative Assessment Workbook.</td>
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<tr>
<td></td>
<td>The facilitator will assist, lead and coach you through the process.</td>
</tr>
<tr>
<td></td>
<td>These activities ensure that you understand the content of the material and that you get an opportunity to test your understanding.</td>
</tr>
</tbody>
</table>
Different Types Of Activities You Can Expect

To accommodate your learning preferences, a variety of different types of activities are included in the formative and summative assessments. They will assist you to achieve the outcomes (correct results) and should guide you through the learning process, making learning a positive and pleasant experience.

The table below provides you with more information related to the types of activities.

<table>
<thead>
<tr>
<th>Types of Activities</th>
<th>Description</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Knowledge Activities</td>
<td>You are required to complete these activities on your own.</td>
<td>These activities normally test your understanding and ability to apply the information.</td>
</tr>
<tr>
<td>Skills Application Activities</td>
<td>You need to complete these activities in the workplace</td>
<td>These activities require you to apply the knowledge and skills gained in the workplace</td>
</tr>
<tr>
<td>Natural Occurring Evidence</td>
<td>You need to collect information and samples of documents from the workplace.</td>
<td>These activities ensure you get the opportunity to learn from experts in the industry.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Collecting examples demonstrates how to implement knowledge and skills in a practical way.</td>
</tr>
</tbody>
</table>
Learner Administration

Attendance Register
You are required to sign the Attendance Register every day you attend training sessions facilitated by a facilitator.

Programme Evaluation Form
On completion you will be supplied with a "Learning programme Evaluation Form". You are required to evaluate your experience in attending the programme.

Please complete the form at the end of the programme, as this will assist us in improving our service and programme material. Your assistance is highly appreciated.

Assessments
The only way to establish whether a learner is competent and has accomplished the specific outcomes is through the assessment process. Assessment involves collecting and interpreting evidence about the learners’ ability to perform a task.

To qualify and receive credits towards your qualification, a registered Assessor will conduct an evaluation and assessment of your portfolio of evidence and competency.

This programme has been aligned to registered unit standards. You will be assessed against the outcomes as stipulated in the unit standard by completing assessments and by compiling a portfolio of evidence that provides proof of your ability to apply the learning to your work situation.
How will Assessments commence?

Formative Assessments

The assessment process is easy to follow. You will be guided by the Facilitator. Your responsibility is to complete all the activities in the Formative Assessment Workbook and submit it to your facilitator.

Summative Assessments

You will be required to complete a series of summative assessments. The Summative Assessment Guide will assist you in identifying the evidence required for final assessment purposes. You will be required to complete these activities on your own time, using real life projects in your workplace or business environment in preparing evidence for your Portfolio of Evidence. Your Facilitator will provide more details in this regard.

To qualify and receive credits towards your qualification, a registered Assessor will conduct an evaluation and assessment of your portfolio of evidence and competency.

Learner Support

The responsibility of learning rests with you, so be proactive and ask questions and seek assistance and help from your facilitator, if required.

Please remember that this Skills Programme is based on outcomes based education principles which implies the following:

✓ You are responsible for your own learning – make sure you manage your study, research and workplace time effectively.
✓ Learning activities are learner driven – make sure you use the Learner Guide and Formative Assessment Workbook in the manner intended, and are familiar with the workplace requirements.
✓ The Facilitator is there to reasonably assist you during contact, practical and workplace time for this programme – make sure that you have his/her contact details.
✓ You are responsible for the safekeeping of your completed Formative Assessment Workbook and Workplace Guide
✓ If you need assistance please contact your facilitator who will gladly assist you.
✓ If you have any special needs please inform the facilitator.
**Learner Expectations**

*Please prepare the following information. You will then be asked to introduce yourself to the instructor as well as your fellow learners*

<table>
<thead>
<tr>
<th>Your name:</th>
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</table>

<table>
<thead>
<tr>
<th>The organisation you represent:</th>
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<td></td>
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</table>

<table>
<thead>
<tr>
<th>Your position in organisation:</th>
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<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>What do you hope to achieve by attending this course / what are your course expectations?</th>
</tr>
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<tbody>
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</table>

The facilitator guide also contains instructions to the facilitator regarding the presentation of the learning, learner support, administrative procedures and encouraging class participation.
An excerpt is quoted from the facilitator guide:

**DOCUMENT CHECKLIST**

<table>
<thead>
<tr>
<th>Document</th>
<th>✓/✗</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategy and alignment Matrix</td>
<td></td>
</tr>
<tr>
<td>Learner Guides</td>
<td></td>
</tr>
<tr>
<td>Learner Formative Assessment Workbooks</td>
<td></td>
</tr>
<tr>
<td>Summative assessment guide</td>
<td></td>
</tr>
<tr>
<td>Facilitator Guide</td>
<td></td>
</tr>
<tr>
<td>Attendance Register</td>
<td></td>
</tr>
<tr>
<td>Name Tags</td>
<td></td>
</tr>
<tr>
<td>Hand-outs</td>
<td></td>
</tr>
<tr>
<td>Course Evaluation Forms for learners</td>
<td></td>
</tr>
<tr>
<td>Course/Venue Evaluation Forms for facilitator</td>
<td></td>
</tr>
<tr>
<td>Additional Material</td>
<td></td>
</tr>
<tr>
<td>Other:</td>
<td></td>
</tr>
</tbody>
</table>

Acknowledgement of receipt and preparations

<table>
<thead>
<tr>
<th>Facilitators Name and Surname</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Facilitators Signature</td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td></td>
</tr>
</tbody>
</table>
YOUR ROLE AS FACILITATOR

You, as facilitator, need to ensure that learners have a thorough understanding of the topic presented. Learners must be able to further learning independently and apply their knowledge and skill in the workplace once they have completed the program.

In order to achieve this, you need to have:

Knowledge of the subject/topic

✓ Understand the requirements of the unit standard
✓ Be a Subject Matter Expert (SME) or know more than just the basics about the topic
✓ Be able to give examples of how to apply the content in the workplace

Knowledge of the workplace

✓ Be able to indicate how learners can/should apply their knowledge and skill in the workplace

Knowledge of the course content

✓ Be familiar with the material, layout and content of the course.
✓ Understand the linkage between the different guides and how they should be used.

Knowledge and understanding of the methodology

✓ Familiarise yourself with the content of the assessment guides and documents for this unit standard.
✓ Follow the assessment procedure correctly.
✓ Familiarise yourself with the preferred methodology that should be used.
✓ Prepare yourself accordingly.
Training Venue And Training Aid Compliance

Ensure that the following is in place:

Facilitator is in possession of:

- Facilitator Guide,
- Learner Guide,
- Assessment Guide
- Attendance Register for each training day
- Handouts, if applicable

Learners are in possession of:

- Learner Guides
- Assessment Guides

Training Venue contains:

- Dictionaries, if available
- A chair for each learner
- A desk with sufficient seating space for each learner
- Paper, pens and pencils for all learners
- A flip chart stand with flip chart sheets
- A PC for the slide shows
- Prestik
- Whiteboard and permanent markers (3 different colours each)
- Sufficient ventilation or air-conditioning
- Schedule of training and relaxation times
- Name tags for each learner
- List of classroom conduct, including:
  - Smoke breaks
  - Body breaks
  - Cell phone etiquette
  - General classroom etiquette
The Facilitator Guide

It guides you through the duration of the Learning Programme;
As a training aid it contains activities that will assist you in transferring the knowledge and skills as stipulated in the SAQA required specific outcomes and assessment criteria

How to use your facilitator guide

The Facilitator Guide contains the essential information to cover the outcomes as stipulated for this Unit Standard. As such, the content of the Learner Guide has to be covered completely.

This learning programme is divided into sections. Each section is preceded by a description of the required outcomes and assessment criteria as contained in the unit standards specified by the South African Qualifications Authority.

These descriptions will define what the learners have to know and be able to do in order to be awarded the credits attached to this learning programme. These credits are regarded as building blocks towards achieving a National Qualification upon successful assessment.

Programme introduction

The following introductory actions are to be taken upon commencement of the programme:

✓ Facilitator him/herself to the learners
✓ Let the delegates introduce themselves individually.
✓ Give a brief comment after each introduction and welcome the delegate before moving to then next delegate. Give full attention to each delegate as they introduce themselves.
✓ Let the participants know what time the breaks are, and for how long. Don’t forget lunch time. Tell them where the toilets are and what time you intend to finish.
✓ Ensure all administrative tasks such as completion of attendance registers, learner detail forms and the like are completed before the programme commences.

Transition

✓ Begin with an appropriate activity, such as an icebreaker, a story or a statement.
✓ Ask learners to state their expectations of the course and write them down on a flipchart/whiteboard and put up where visible for duration of course.

State course outcomes

✓ Go through the objectives and the content before you proceed with your programme.
✓ This learning programme forms a part of the National Certificate Business Administration Services Level 4 and introduces a holistic approach to written communication as an introduction to the Secretarial qualification.

Group and individual activities

A certain level of collective general knowledge can be assumed in any group. Encourage lively discussion in class during group activities. Discussions can take the form of brainstorming if necessary.

Ensure that shy and quiet learners are also drawn into the discussion, as learners will have to learn to start thinking for themselves and taking control of the learning process in order to achieve all the outcomes.

All the conclusions made during group activities have to be noted down by learners in order to achieve all the outcomes. Their notes will form part of formative and summative assessments.

Teamwork is important in all the unit standards. Divide the learners into groups and make it clear to them that they have to stay in these groups for the duration of the qualification. They have to learn to cope with conflict and with each other even if they do not get along together, since they will not have any say as to who they will be working with when they find themselves in a working environment.

Timelines

<table>
<thead>
<tr>
<th>SAQA US ID</th>
<th>UNIT STANDARD TITLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>377401</td>
<td>Handle a range of customer complaints in a Contact Centre and BPO</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Institutional Duration</th>
<th>Learning Duration</th>
<th>NQF LEVEL</th>
<th>CREDITS</th>
</tr>
</thead>
<tbody>
<tr>
<td>30 Hours</td>
<td>70 Hours</td>
<td>Level 3</td>
<td>10</td>
</tr>
</tbody>
</table>

Course content

The course content covers all the basics required for learners to achieve the outcomes, however, at times there is information that learners will have to obtain by themselves.

To this end, a glossary is also not included in the course material. It is expected of learners to compile their own glossaries, which will form part of outcomes for communication unit standards. Please encourage them to start compiling glossaries as soon as possible. The glossaries can be simple: they need only quote the word and the meaning, as long as they understand what it means.
Learners are required to start thinking for themselves and take control of the learning process as soon as possible. To this end, research projects will form part of some assessments.

Class Activities

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. 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, unless indicated otherwise.

Assessment

The process of assessment of competency should be explained in detail to learners upon commencement of course. The following statements should be made:

Attending the training is not sufficient evidence of competence to award a certificate and the credits attached to this programme. Learners are required to undergo assessment in order to prove competence in order to be awarded the credits attached to this programme, eventually leading to a national qualification.

Explain the concept ‘Competence’

Competence is the ability to perform whole work roles, to the standards expected in employment, in a real working environment.

There are three levels of competence:

- Foundational competence: an understanding of what you do and why
- Practical competence: the ability to perform a set of tasks in an authentic context
- Reflexive competence: the ability to adapt to changed circumstances appropriately and responsibly, and to explain the reason behind the action

Generally speaking, in the past, education and training institutions became accustomed to awarding certificates based on the amount of time spent in a classroom or training room. In
addition, learners were assessed by means of an examination that tested memory as opposed to actual competence. This meant that many learners were awarded certificates and even whole qualifications without ever having to demonstrate that they were able to practically apply their knowledge and skills.

Now, based on the principles of the National Qualifications Framework, in order for the learners to receive a certificate of competence and be awarded credits, they are required to provide evidence of their competence by compiling a portfolio of evidence, which will be assessed by a Stanford Business College assessor.

Explain the concept ‘Portfolio of Evidence’

A portfolio of evidence is a structured collection of evidence that proves the learner’s efforts, progress and achievement in a specific learning area, and demonstrates competence.

Explain the assessment process

Assessment of competence is a process of making judgments about an individual's competence through matching evidence collected to the appropriate national standards. That is why the evidence in the learner’s portfolio should be closely linked to the outcomes and assessment criteria of the unit standards against which the learners are being assessed.

Ideally, formative assessments should minimise the need for re-assessment as the assessor and the candidate will agree to a summative assessment only when they both feel the candidate is ready.

However, candidates who are deemed not yet competent on a summative assessment will be allowed to be re-assessed no more than two times.

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

- Specific feedback will be given so that candidates can concentrate on only those areas in which they were assessed as not yet competent
- Re-assessment will take place in the same situation or context and under the same conditions as the original assessment
- Only the specific outcomes that were not achieved will be re-assessed

Candidates who are repeatedly unsuccessful will be given guidance on other possible and more suitable learning avenues.

In order for the assessor to assess competence, the portfolio should provide evidence of both knowledge and skills, and of how knowledge and skills were applied in a variety of contexts.

This Candidate’s Assessment Portfolio directs the learner in the activities that need to be completed so that competence can be assessed and the credits attached to the programme be awarded.

- The assessment requirements for this programme are stated at the beginning of each section.

The right of the candidate to appeal against assessment decisions or practices they regard as unfair. An Appeals and Disputes procedure is in place and communicated to all assessment candidates prior to assessment in order for them to appeal on the basis of:

- Unfair assessment
- Invalid assessment
- Unreliable assessment
Unethical practices
Inadequate expertise and experience of the assessor

Appeals have to be lodged in writing (Candidate Appeal Form) & submitted to the internal moderator within 48 hours, following the assessment in question. The moderator will consider the appeal & make a decision regarding the granting of a re-assessment. The learner will be informed about the appeal outcome within 3 days of lodging the appeal. Should the learner not be satisfied with the internal appeal outcome, the learner will be advised of the rights to refer the matter to the Services SETA ETQA.

All the required forms and explanations are included in the assessment guide.

Upon Completion Of The Programme

The facilitator should:

- Ensure that all learners have completed all Learner Administration documentation, including the Learner Evaluation (of the Facilitator) forms
- All attendance registers have been completed correctly
- All Learners are in possession of a:
  - Learner Guide
  - Assessment Guide
  - Clear Instructions as to the subsequent activities leading to assessment, moderation and certification

Workplace support

Insert what support you provide to the learners

Alignment matrix

The PSS document is included in the Seta alignment matrix

Assessment strategy

The assessments are based on the principles of fairness, validity, practicability, reliability and consistency as stated in the assessment strategy document found in all Learner summative assessment guides.

Where possible, assessments are developed around the learner’s actual work situation so that learner is able to practice the skills and develop the necessary knowledge required by the unit standard. Also, if a learner has to hand in copies of reports that they have to do at work anyway, for example, it makes it easier for them to complete the workplace activities

We make use of as many of the following tools as possible:

- Questionnaire which could be an end of training activity or an end of programme activity
✓ Observation: where the supervisor or facilitator observes the learner
✓ Presentation: which can be done in the workplace to team members or as a final summative assessment for the facilitator and fellow learners
✓ Research: where learner has to gather actual data at work
✓ Work samples: where learner hands in actual work, e.g. information brochures that have been prepared or forms completed
✓ Reports: where possible learner has to hand in actual reports required at work
✓ Verbal assessments
✓ Testimonials, e.g. from clients for good customer service
✓ Reflexive questions which allow the learner to reflect on the learning and the application of what he has learnt in the workplace. Reflexive questions are also used to encourage learners to think of improvements to systems and procedures used in the workplace

The combination should allow the assessor to make an accurate judgement about the learner’s competence.

The following information appears in all learner summative assessment guides:

**COMPETENCE**

*Being Declared Competent Entails:*

*Competence is the ability to perform whole work roles, to the standards expected in employment, in a real working environment.*

*There are three levels of competence:*

✓ Foundational competence: an understanding of what you do and why
✓ Practical competence: the ability to perform a set of tasks in an authentic context
✓ Reflexive competence: the ability to adapt to changed circumstances appropriately and responsibly, and to explain the reason behind the action

*To receive a certificate of competence and be awarded credits, a learner is required to provide evidence of competence by compiling a portfolio of evidence, which will be assessed by a Services SETA accredited assessor.*

**You Have to Submit a Portfolio of Evidence**

*A portfolio of evidence is a structured collection of evidence that reflects your efforts, progress and achievement in a specific learning area, and demonstrates your competence.*

**The Assessment of Your Competence**

*Assessment of competence is a process of making judgments about an individual’s competence through matching evidence collected to the appropriate national standards. The evidence in your portfolio should closely reflect the outcomes and assessment criteria of the unit standards of the learning programme for which you are being assessed.*

*To determine a candidate’s knowledge and ability to apply the skills before and during the learning programme, formative assessments are done to determine the learner's progress towards full competence. This normally guides the learner towards a successful summative (final) assessment to which assessor and the candidate only agree when they both feel the candidate is ready.*

*Should it happen that a candidate is deemed not yet competent upon a summative assessment, that candidate will be allowed to be re-assessed. The candidate can, however, only be allowed two reassessments.*
When learners have to undergo re-assessment, the following conditions will apply:

- Specific feedback will be given so that candidates can concentrate on only those areas in which they were assessed as not yet competent
- Re-assessment will take place in the same situation or context and under the same conditions as the original assessment
- Only the specific outcomes that were not achieved will be re-assessed

Candidates who are repeatedly unsuccessful will be given guidance on other possible and more suitable learning avenues.

In order for your assessor to assess your competence, your portfolio should provide evidence of both your knowledge and skills, and of how you applied your knowledge and skills in a variety of contexts.

This Candidate’s Assessment Portfolio directs you in the activities that need to be completed so that your competence can be assessed and so that you can be awarded the credits attached to the programme.

**APPEALS & DISPUTES**

The candidate has the right to appeal against assessment decision or practice they regard as unfair. An Appeals and Disputes procedure is in place and communicated to all assessment candidates in order for them to appeal on the basis of:

- Unfair assessment
- Invalid assessment
- Unreliable assessment
- Unethical practices
- Inadequate expertise and experience of the assessor

Appeals have to be lodged in writing (Candidate Appeal Form) & submitted to the training provider internal moderator within 48 hours, following the assessment in question. The moderator will consider the appeal & make a decision regarding the granting of a re-assessment. The learner will be informed about the appeal-outcome within 3 days of lodging the appeal. Should the learner not be satisfied with the internal appeal outcome, the learner will be advised of the rights to refer the matter to the SETA ETQA.
ASSESSMENT PROCESS FLOW

CANDIDATE → Assessment Plan agreed by candidate & completed by the assessors before the actual assessment → Assessment Activities conducted per the Assessment Plan

ASSESSMENT

Detailed Assessor Report compiled & forwarded for Moderation → Assessment Plan agreed by candidate & completed by assessor & individual feedback given to candidate → Feedback Report Completed by Assessor & individual feedback given to candidate → Feedback Report

Assessment Results Moderated → Action Plan completed by Assessor → Record of Learning Updated → Record of Learning Updated → All records & evidence filed → SETA

Completed Assessor report/Moderator report/Record of Learning forwarded to SETA → Approval and Certification obtained from SETA → Certificate of Competencies issued to successful candidates → SETA to register on National Learner Database
ASSESSMENT STRATEGY

This assessment exercise will cover the outcomes for the unit standard in order to achieve a competency certificate. The purpose of the assessment process is to gather enough evidence to prove all unit standard outcomes were achieved.

Competency will be assessed through class hands on tasks, input and performance based assessments, and assignments which will require a fair amount of research. Assessment evidence should be sufficient to prove that the candidate is competent in all require tasks set by the unit standards.

A summative assessment will be conducted at end of course to confirm assessment judgments. Principles of fairness, validity, practicability, reliability and consistency will be adhered to throughout.

<table>
<thead>
<tr>
<th>Program</th>
<th>Perform Acquisition Management activities for public sector supply chain management</th>
<th>Unit Standard Codes</th>
<th>377898</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level</td>
<td>Level 5</td>
<td>Credits</td>
<td>11</td>
</tr>
<tr>
<td>Purpose of Assessment</td>
<td>The purpose of this assessment is to check your knowledge and understanding of the unit standard in order to prepare you for the workplace.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Assessment Procedures

- An integrated assessment approach will be followed to allow for practical and theoretical components. The entails the assessment of a number of unit standards, outcomes and criteria together in one assessment activity
- Candidates are not only assessed against specific outcomes, but also on critical outcomes, attitudes and values
- A summative competence judgment will be made on the basis of all assessment evidence produced, that proves that the candidate can be consistently judged as competent against the outcomes of the unit standards and the qualification as a whole.
- Candidates take responsibility for their own assessment and should notify the assessor when they are ready for assessment
- Candidates will receive feedback after the summative assessment, which will be discussed after all assessments have been completed
- All assessments will be reviewed to ensure that assessment practices are valid, fair, transparent, consistent and current
- An Internal/External moderator will moderate assessment practices
- The SETA will also conduct external moderation
Facilitator guide

The facilitator guide contains the following:

✓ Instructions to the facilitator
✓ All the contents of the learner guide
✓ Formative assessment activities with memo

The facilitator guide should always be used together with the PSS document and the summative assessment guides to ensure the facilitator has all the required information, instructions and procedures to follow.

The PSS document should be extracted from the Seta alignment matrix

Qualification curriculum

To be awarded the Qualification learners are required to obtain a minimum of 124 credits as detailed below.

Fundamental component

The Fundamental Component consists of Unit standards to the value of 36 credits all of which are compulsory

Core component

The Core Component consists of Unit Standards to the value of 55 credits all of which are compulsory

Elective component

The Elective Component consists of individual unit standards from which the learner must choose unit standards to the value of a minimum of 33 credits

Layout according to exit level outcomes

1. Provide effective customer service in a contact centre and/or Business Process Outsourcing centre.

Associated assessment criteria

✓ The communication techniques used to handle a variety of customer interactions are described as they relate to various circumstances. Range: Various circumstances include but are not limited to handling objections, complaints, customers who are distressed, confused, aggressive and abusive.
✓ Communication skills are applied with customers so as to be able to handle the query
✓ Communication breakdowns/barriers are recognised in order to take corrective action. Range: Communication breakdowns include but are not limited to communication difficulties with technology and the environment. Corrective action includes but is not limited to paraphrasing, clarifying and questioning.
✓ The need to promote the organisation's image is explained in terms of building rapport with the stakeholders.
✓ Methods for handling and resolving customer enquiries to ensure customer satisfaction in accordance with organisational and legal requirements are described.
✓ Queries are prioritised in accordance with customer situations to meet specified timeframes.
✓ An action plan to meet the customer's needs and expectations is formulated.
✓ Closure of enquiries is explained in accordance with organisational requirements

### Module 1: Communication fundamentals

<table>
<thead>
<tr>
<th>Fundamental</th>
<th>Code</th>
<th>Description</th>
<th>Level</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fundamental</td>
<td>119472</td>
<td>Accommodate audience and context needs in oral/signed communication</td>
<td>Level 3</td>
<td>5</td>
</tr>
<tr>
<td>Fundamental</td>
<td>119457</td>
<td>Interpret and use information from texts</td>
<td>Level 3</td>
<td>5</td>
</tr>
<tr>
<td>Fundamental</td>
<td>119467</td>
<td>Use language and communication in occupational learning programmes</td>
<td>Level 3</td>
<td>5</td>
</tr>
<tr>
<td>Fundamental</td>
<td>119465</td>
<td>Write/present/sign texts for a range of communicative contexts</td>
<td>Level 3</td>
<td>5</td>
</tr>
</tbody>
</table>

### Module 2: Customer Service

<table>
<thead>
<tr>
<th>Core</th>
<th>Code</th>
<th>Description</th>
<th>Level</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core</td>
<td>377441</td>
<td>Communicate with customers in a Contact Centre and BPO</td>
<td>Level 3</td>
<td>10</td>
</tr>
<tr>
<td>Core</td>
<td>377420</td>
<td>Demonstrate an understanding of Contact Centre and BPO working practices</td>
<td>Level 3</td>
<td>4</td>
</tr>
<tr>
<td>Core</td>
<td>377401</td>
<td>Handle a range of customer complaints in a Contact Centre and BPO</td>
<td>Level 3</td>
<td>10</td>
</tr>
</tbody>
</table>

### Module 3: Debt collecting

<table>
<thead>
<tr>
<th>Elective</th>
<th>Code</th>
<th>Description</th>
<th>Level</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elective</td>
<td>116610</td>
<td>Assess and allocate debt collecting accounts according to risk profile</td>
<td>Level 4</td>
<td>6</td>
</tr>
<tr>
<td>Elective</td>
<td>116606</td>
<td>Communicate orally with relevant stakeholders in the recovery of debt</td>
<td>Level 4</td>
<td>6</td>
</tr>
<tr>
<td>Elective</td>
<td>116598</td>
<td>Compile debtor correspondence in accordance with legislation and standard procedures</td>
<td>Level 4</td>
<td>6</td>
</tr>
<tr>
<td>Elective</td>
<td>116601</td>
<td>Manage credit grantor portfolio</td>
<td>Level 4</td>
<td>4</td>
</tr>
<tr>
<td>Elective</td>
<td>116599</td>
<td>Manage debtor portfolio</td>
<td>Level 4</td>
<td>6</td>
</tr>
<tr>
<td>Elective</td>
<td>13948</td>
<td>Negotiate an agreement or deal in an authentic work situation</td>
<td>Level 4</td>
<td>5</td>
</tr>
</tbody>
</table>

2. **Demonstrate knowledge of and use communication technology in a contact centre environment.**

Range: Technology includes but is not limited to telephony, fax, email, internet, intranet, multifunction device, webchat and SMS

**Associated assessment criteria**
The position of the various items of communication technology is located in the call centre.

The different types of communication technology used in a contact centre are explained in terms of their advantages and disadvantages.

Communication technology is used in accordance with company procedures.

The correct language format for each type of written text is used in accordance with accepted practice. Range: Written text e-mail messages, mobile phone text, SMS text, text chat from instant messenger conversations, MMS text and Web logs.

Problems within a typical contact centre environment related to Communication technology are identified and described in terms of their causes and possible solutions. Range: Communication technology problems may include but are not limited to failures of site, ACD, Call Routing, PABX, LAN, IVR, CTI and VoIP

Module 4: Communication technology

<table>
<thead>
<tr>
<th>Core</th>
<th>14348</th>
<th>Process incoming and outgoing telephone calls</th>
<th>Level 2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core</td>
<td>377421</td>
<td>Manage in-bound and/or out-bound calls in a Contact Centre</td>
<td>Level 3</td>
<td>8</td>
</tr>
<tr>
<td>Elective</td>
<td>116940</td>
<td>Use a Graphical User Interface (GUI)-based spreadsheet application to solve a given problem</td>
<td>Level 3</td>
<td>6</td>
</tr>
</tbody>
</table>

3. **Capture data to track interactions.**

Range: Data include but are not limited to personal details, communication record between agent and the customer, communication outcome, resolution path and timeframes

**Associated assessment criteria**

- Data is gathered and collated in accordance with a Service Level Agreement (SLA).
- The consequences of non-adherence to the SLA are described in terms of the impact on all stakeholders

Module 5: Numeracy fundamentals

<table>
<thead>
<tr>
<th>Fundamental</th>
<th>9010</th>
<th>Demonstrate an understanding of the use of different number bases and measurement units and an awareness of error in the context of relevant calculations</th>
<th>Level 3</th>
<th>2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fundamental</td>
<td>9013</td>
<td>Describe, apply, analyse and calculate shape and motion in 2-and 3-dimensional space in different contexts</td>
<td>Level 3</td>
<td>4</td>
</tr>
<tr>
<td>Fundamental</td>
<td>9012</td>
<td>Investigate life and work related problems using data and probabilities</td>
<td>Level 3</td>
<td>5</td>
</tr>
<tr>
<td>Fundamental</td>
<td>7456</td>
<td>Use mathematics to investigate and monitor the financial aspects of personal, business and national issues</td>
<td>Level 3</td>
<td>5</td>
</tr>
</tbody>
</table>

Module 6: Work with data

<table>
<thead>
<tr>
<th>Core</th>
<th>377460</th>
<th>Collect and record information queries and requests from customers</th>
<th>Level 3</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core</td>
<td>110025</td>
<td>Process data using information technology</td>
<td>Level 4</td>
<td>5</td>
</tr>
</tbody>
</table>
4. **Work effectively as a team member in a group to enhance team performance**

**Associated assessment criteria**

- Own roles and responsibilities in the workplace are described with examples.
- The importance of own contribution to group work in the workplace is explained in terms of its impact in achieving group and organisational goals and objectives.
- Opportunities for personal growth and advancement are explained with examples.
- A variety of strategies to deal with potential conflict in a team or group are described with examples.

**Module 7: Work in a team**

<table>
<thead>
<tr>
<th>Core</th>
<th>115772</th>
<th>Use time management techniques to manage time in a financial services environment</th>
<th>Level 2</th>
<th>2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core</td>
<td>13912</td>
<td>Apply knowledge of self and team in order to develop a plan to enhance team performance</td>
<td>Level 3</td>
<td>5</td>
</tr>
<tr>
<td>Core</td>
<td>244589</td>
<td>Identify causes of stress and techniques to manage it in the workplace</td>
<td>Level 3</td>
<td>2</td>
</tr>
<tr>
<td>Elective</td>
<td>259639</td>
<td>Explain basic health and safety principles in and around the workplace</td>
<td>Level 2</td>
<td>4</td>
</tr>
</tbody>
</table>

PAMELA HUYGEN
072 228 9772
pamela@smartscript.co.za

NARINA HORN
076 482 0564
narina@smartscript.co.za