

**OCR Level 1 NVQ in Contact Centre Operations (03447)**  
**OCR Level 2 NVQ in Contact Centre Operations (03448)**  
**OCR Level 3 NVQ for Contact Centre Professionals (03449)**  
**OCR Level 4 NVQ for Contact Centre Professionals (03450)**  
**OCR Level 5 NVQ for Contact Centre Professionals (03451)**

## What is an NVQ?

An NVQ (National Vocational Qualification) is a qualification that assesses someone's competence (that is the skills, knowledge and understanding they have) principally in a work situation. NVQs are based on the national occupational standards that describe the level and breadth of performance expected of individuals working in occupations that require interaction with customers via electronic methods, and the management and operation of such facilities. These NVQs are based on the national occupational standards developed by business, for business, through e-skills UK, which is the government-approved Sector Skills Council for IT, Telecoms and Contact Centres.

The awarding body for these NVQs is OCR (Oxford Cambridge and RSA Examinations) and the regulatory body is the Qualifications and Curriculum Development Authority (QCDA).

## Who are these NVQs for?

These NVQs are designed to recognise the skills of individuals in the UK who are working in occupations that require interaction with customers via electronic methods, and the management and operation of such facilities.

You should be working in a company whose main business is a Contact Centre or in the Contact Centre department of a company in other business areas. This could encompass both large enterprise and small or medium enterprise (SMEs).

They are work-oriented qualifications and to achieve them you will need the opportunity to demonstrate your competence within your work role. They are open to anyone of all ages, of either gender and there are no entry barriers on grounds of race, creed or proven academic attainment or learning. You need no previous academic qualifications to complete these NVQs.

## What is its purpose?

The aim of these qualifications is to recognise the application of a range of skills and knowledge in the workplace, meeting employer workforce demands. The flexibility of these qualifications will enable individuals skills to be adapted for a specific job and employer requirement.

# What is the structure of the NVQ?

The standards that apply to the NVQs at levels 1 and 2 in Contact Centre Operations and NVQs at Level 3, 4 and 5 for Contact Centre Professionals are contained in Areas of Competence (AoC). Each AoC covers a particular activity/skill, for example, the skill of Direct selling and customer acquisition in Contact Centres or the activity of Customer Care.

An AoC equates to an OCR Unit.

The units within the qualification have been assigned unit values and to achieve a full OCR Contact Centre Operations or Contact Centre Professionals NVQ, candidates must achieve a minimum total of UVs. These are:

- ◆ 40 Unit Values for a level 1 qualification;
- ◆ 100 Unit Values for a level 2 qualification;
- ◆ 180 Unit Values for a level 3 qualification;
- ◆ 280 Unit Values for a level 4 qualification and
- ◆ 350 Unit Values for a level 5 qualification.

In composing a qualification for individual candidates, the following requirements and restrictions must be considered:

- Each qualification must contain the mandatory units:

**‘Develop personal and organisational effectiveness’** at the level of the qualification and at level 4 for the level 5 qualification and

**‘Health and Safety in ICT and Contact Centres’** at least at level 1

- Each Area of Competence can contribute to a qualification at **one** level only.
- At least **60%** of the unit value of the **optional** units must be achieved at the level of the qualification. This equates to:
  - ◆ 25 UVs for level 1;
  - ◆ 60 UVs for level 2;
  - ◆ 110 UVs for level 3;
  - ◆ 170 UVs for level 4; and
  - ◆ 210 UVs for level 5.
- A maximum of **two** units may be chosen from the restricted option list.

The areas of competence and unit values are as follows:

| Unit  | Area of Competence (AOC)                                   | Level 1   | Level 2   | Level 3   | Level 4   | Level 5 |
|---|--|-----------|-----------|-----------|-----------|---------|
| <b>Mandatory Units:</b>   |  |           |           |           |           |         |
| <b>AA</b>   | <b>Develop personal and organisational effectiveness</b>   | <b>10</b> | <b>20</b> | <b>30</b> | <b>40</b> |         |
| <b>BB</b>   | <b>Health and Safety in ICT and Contact Centres</b>        | <b>5</b>  |           | 30        | 40        | 50      |
| <b>Optional Units:</b>  |  |           |           |           |           |         |
| CC  | Customer care  | 10        | 20        | 30        | 40        | 50      |
| DD  | Interpersonal and written communication                    | 5         | 15        | 30        | 40        |         |
| EE  | Remote support for products or services                    | 10        | 20        | 30        | 40        | 50      |
| FF  | Contact Centre systems and technology                      | 10        | 20        | 30        | 40        | 50      |
| GG  | Direct selling and customer acquisition in Contact Centres | 10        | 20        | 30        | 40        | 50      |
| H   | E-mail   | 5         | 15        | 25        |           |         |
| HH  | Performance management                                     |           |           | 30        | 40        | 50      |
| II  | Staff resource planning for Contact Centres                |           |           | 30        | 40        | 50      |
| ZZ  | Incident Management  |           | 20        | 30        | 40        | 50      |
| <b>Restricted Optional Units: (Only two units can be used from this list)</b> |  |           |           |           |           |         |
| G   | Internets and intranets                                    | 5         | 15        | 25        |           |         |
| I   | Word processing software                                   | 10        | 20        | 30        |           |         |
| J   | Spreadsheets software                                      | 10        | 20        | 35        |           |         |
| K   | Database software  | 10        | 20        | 35        |           |         |
| N   | Specialist and Bespoke Software                            | 10        | 20        | 30        |           |         |
| P   | Use IT systems   | 5         | 15        | 25        |           |         |
| Q   | Use IT to exchange information                             | 5         | 15        | 25        |           |         |
| R   | Sector specific unit*                                      | 10        | 20        | 30        | 40        |         |
| S   | General uses of IT   | 5         | 15        | 25        |           |         |
| T   | Use IT software  | 5         | 15        | 25        |           |         |
| V1  | Identify individual learning aims and programmes           |           |           | 30        |           |         |
| V2  | Agree learning programmes with learners                    |           |           | 30        |           |         |
| V3  | Develop training sessions                                  |           |           | 30        |           |         |
| V4  | Enable learning through presentations                      |           |           | 30        |           |         |
| V5  | Enable learning through demonstrations and instruction     |           |           | 30        |           |         |

| Unit | Area of Competence (AOC)  | Level 1 | Level 2 | Level 3 | Level 4 | Level 5 |
|------|---|---------|---------|---------|---------|---------|
| V6   | Enable individual learning through coaching   |         |         | 30      |         |         |
| V7   | Enable group learning   |         |         | 30      |         |         |
| V8   | Support learners by mentoring in the workplace  |         |         | 30      |         |         |
| V9   | Support and advise individual learners  |         |         | 30      |         |         |
| V10  | Monitor and review progress with learners   |         |         | 30      |         |         |
| V11  | Support competence achieved in the workplace  |         |         | 30      |         |         |
| W1   | Support the efficient use of resources  |         |         | 30      |         |         |
| W2   | Contribute to the selection of personnel for activities                               |         |         | 30      |         |         |
| W3   | Contribute to the development of teams and individuals                                |         |         | 30      |         |         |
| W4   | Lead the work of teams and individuals to enhance performance                         |         |         | 30      |         |         |
| W5   | Respond to poor performance in your team  |         |         | 30      |         |         |
| W6   | Facilitate meetings   |         |         | 30      |         |         |
| W7   | Contribute to improvements at work  |         |         |         | 40      |         |
| W8   | Manage the change in organisational activities  |         |         |         | 40      |         |
| W9   | Manage the use of physical resources  |         |         |         | 40      |         |
| W10  | Manage the use of financial resources   |         |         |         | 40      |         |
| W11  | Select personnel for activities   |         |         |         | 40      |         |
| W12  | Develop teams and individuals to enhance performance                                  |         |         |         | 40      |         |
| W13  | Manage the performance of teams and individuals                                       |         |         |         | 40      |         |
| W14  | Deal with poor performance in your team   |         |         |         | 40      |         |
| W15  | Chair and participate in meetings   |         |         |         | 40      |         |
| W16  | Determine the effective use of resources  |         |         |         |         | 50      |
| W17  | Delegate work to others   |         |         |         |         | 50      |
| X1   | Provide advice and support for the development and implementation of quality policies |         |         |         | 40      |         |
| X2   | Provide advice and support for the development and implementation of quality systems  |         |         | 30      |         |         |
| X3   | Carry out quality audits  |         |         | 30      |         |         |
| X4   | Implement quality assurance systems   |         |         |         | 40      |         |
| X5   | Manage continuous quality improvement   |         |         |         |         | 50      |
| Y1   | Develop operational objectives for the project  |         |         |         | 20      |         |
| Y2   | Develop a detailed schedule for the project   |         |         |         | 20      |         |
| Y3   | Identify perceived risks and evaluate options for their control                       |         |         |         | 20      |         |
| Y4   | Co-ordinate, monitor and control project schedules                                    |         |         |         | 20      |         |
| Y5   | Control hand-over of responsibility for the project                                   |         |         |         | 20      |         |
| Y6   | Ensure the completion of project activities   |         |         |         | 20      |         |
| Y7   | Develop strategic objectives for the project  |         |         |         |         | 25      |
| Y8   | Identify and evaluate options for the project   |         |         |         |         | 25      |
| Y9   | Prepare the business case for the project   |         |         |         |         | 25      |
| Y10  | Prepare a project brief   |         |         |         |         | 25      |
| Y11  | Identify strategic risk and evaluate options for minimising project risk              |         |         |         |         | 25      |
| Y12  | Develop outline programmes or schedules for projects                                  |         |         |         |         | 25      |
| Y13  | Specify activities for project schedules  |         |         |         |         | 25      |
| Y14  | Review the progress of projects   |         |         |         |         | 25      |
| Y15  | Evaluate projects   |         |         |         |         | 25      |

A unit is normally the smallest part of the NVQ that a candidate can be certificated for.

## Who is involved in the delivery of this NVQ?

### Assessment centre

Any organisation, whether it is a place of employment, college or private training organisation can be approved to offer these qualifications, as long as it meets the criteria set out in the OCR publication *National Vocational Qualifications and Other Verified Qualifications - Centre Guidance* (reference code L526). This includes being able to provide suitable assessors and internal verifiers. For more

information on how to become an OCR-approved assessment centre see section **Further support and information**.

Once approved, an **assessment centre** will register candidates for the NVQ and allocate each candidate an **assessor** or **assessors**.

### Trainer

The trainer will develop a candidates knowledge, understanding and skills in relation to the NVQ that is being undertaken.

**Trainers will:**

- provide opportunities for learning
- provide ongoing mentoring to the candidate, including review and feedback on learning experiences and development of competence
- provide opportunities for a candidate to practice what they have learnt in a realistic, but safe and protected, working environment or, where this is not appropriate, in a simulated environment.

Please note that learning, and practising the learning, alone does not indicate competence in the workplace. The application of the learning will need to be assessed for competence to be decided.

### Expert Witness

Expert witnesses can be drawn from a wide range of people who can attest to performance in the workplace, including line managers and experienced colleagues from inside the candidate's organisation or from other organisations such as customers or clients.

The expert witness can, in particular, provide evidence relating to the candidate's competence:

- when working with, or supporting, specialist products, equipment or systems;
- in meeting customer requirements; and
- of working within organisational procedures.

The criteria for expert witnesses are set out in section **occupational competence of the assessment team**.

### Assessor

Assessors will be appointed by approved centres to assess candidate performance and judge the validity of work place assessments.

Please note that:

- where expert witnesses make a significant contribution to the assessment process the assessor will be responsible for vetting the selection of expert witnesses including evidence of occupational competence and monitoring their contribution to the assessment process.
- the assessor should also maintain an up-to-date register of all accepted expert witnesses and the candidates to whom they refer. This register will be subject to review as part of the verification process by both the internal and external verifier.

The assessor will be responsible for making assessment judgements including for units where evidence relies extensively on expert witness testimony. The assessor will make use of appropriate expert witness testimony as part of the overall assessment of the candidate. In addition, the assessor must ensure that witness testimony clearly matches the level and breadth of performance described in the units, and this may be done, for example, by the assessor questioning the witness against the knowledge and skills specified in the units.

### The assessor must have suitable and reliable experience and be trained and qualified as an NVQ assessor.

The criteria for appointing assessors are set out in section **occupational competence of the assessment team**. An

assessor may be a candidate's line manager, a tutor at college, or someone specially appointed to this role. Assessments may also be carried out by a team of assessors.

The roles of trainer and assessor are inextricably linked and may be carried out by the same person, however, training activities must be clearly separated from assessment and only assessed evidence of competence should be presented as evidence towards the NVQ.

### Internal Verifier

Internal verifiers will be appointed by approved centres to ensure the quality and consistency of assessments within the centre.

Each assessors work must be checked and confirmed by an **internal verifier** who is also a member of the staff of the assessment centre. The criteria for appointing internal verifiers are set in section **occupational competence of the assessment team**. The internal verifier checks and standardises assessment decisions made by the assessors in the centre.

The IV will observe assessors carrying out assessments, review assessment decisions from the evidence provided and hold meetings with the assessment team to ensure consistency in the use of paperwork and interpretation of the qualifications requirements.

### External Verifier

The **external verifier** checks the assessment and internal verification processes and decisions made in the centre, and authorises the claims for certificates. The external verifier is appointed by OCR.

## How is this NVQ assessed?

Like all NVQs, these qualifications are **competence-based**. This means that it is linked to a person's ability to competently perform a range of tasks connected with their work.

It is the assessors role to satisfy themselves that evidence is available for all performance, knowledge and evidence requirements before they can decide that a candidate has completed a unit. Where performance and knowledge requirements allow evidence to be generated by other methods, for example by questioning the candidate or simulation, assessors must be satisfied that the candidate will be competent under these conditions or in these types of situations in the workplace in the future.

# What are the important assessment requirements for these NVQs?

## Assessor and internal verifier requirements

### Assessors must

- possess the relevant D/A1 units as appropriate

### and

- have sufficient call handling experience to demonstrate that they have the skills and knowledge required by the standards they are assessing (see **Proof of occupational competence** below)
- be able to make accurate assessment decisions for the relevant qualification or part qualification
- be able to understand how evidence of competence, as defined within the national standards, may be demonstrated within that call handling environment (including those where a paper-free environment is encouraged)
- maintain their occupational competence and knowledge of the sector through eg internal or external work practice; internal or external work shadowing opportunities, or other relevant CPD activities.

### Internal verifiers must

- possess the relevant D/V1 units as appropriate

### and

- have sufficient call handling experience to demonstrate that they have the skills and knowledge required by the standards they are verifying (see **Proof of occupational competence** below)
- be able to make valid judgements on assessment decisions made by assessors for relevant qualifications
- be able to interpret the national standards relating to call handling qualifications
- maintain their occupational competence and knowledge of the sector through eg internal or external work practice, internal or external work shadowing opportunities of other relevant CPD activities.

## Where do Key Skills units fit in?

These NVQs have been signposted to Key Skills 2000 specifications, which are available as either individual units or the Key Skills Qualification. Signposting has been provided within the scheme documentation and is designed to help candidates to identify opportunities to:

- develop Key Skills within the context of developing occupational competence
- collect evidence of achievement of Key Skills along with evidence for these NVQs

For more information on Key Skills contact the OCR Customer Contact Centre (024) 76 851509, email [vocational.qualifications@ocr.org.uk](mailto:vocational.qualifications@ocr.org.uk)

## What to do next?

To seek approval to offer the qualification(s), please apply on-line following the step-by-step guide to applying for approval for vocational qualifications indicated on our 'Centre Approval' webpage.

You might be interested to know that OCR staff are available to help with any aspect of setting up a vocational assessment centre. Through an advisory telephone call or a centre visit, we can assist, not only with the completion of the form, but also provide advice on the following areas:

- identifying potential candidates and marketing opportunities
- meeting OCR requirements
- identifying resourcing levels, both in terms of staff and equipment
- the documents you might need for the benefit of the candidates and a smooth running centre operation

For further information, please get in touch with our **Customer Contact Centre** by phone: **(024 7685 1509)**; email: [vocational.qualifications@ocr.org.uk](mailto:vocational.qualifications@ocr.org.uk); or in writing: **OCR Customer Contact Centre, OCR, Westwood Way, Coventry, CV4 8JQ.**

A summary of how the approval process works is provided in our **Admin Guide for Vocational Qualifications** (publication ref. code: A850). Our **Fees List** contains the charges for centre evaluation, candidate entries and certification. Both documents are available to download from our website [www.ocr.org.uk](http://www.ocr.org.uk)

- A scheme book containing the standards and guidance on implementation of the NVQ will be available to purchase, from OCR Publications (0870 870 6622).
- The leaflet *Becoming an NVQ Centre: Steps to Implementation* (N61) will be useful to organisations considering applying to OCR to become a centre.
- Full details of how to apply are given in *Centre Guidance* (L526) which is included in the *Centre Approval Pack*, is available from Operations in Coventry.

# What other related OCR qualifications are available?

OCR offers a range of qualifications relevant to Call Handling NVQs:

Other qualifications offered by OCR which may be of interest to you, include:

**OCR Level 2 NVQ in Customer Service**

**OCR Level 3 NVQ in Customer Service**

**OCR Level 2 in Team Leading**

**Management NVQ Level 3**

**Management NVQ Level 4**

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**[www.ocr.org.uk](http://www.ocr.org.uk)**

OCR customer contact centre

**Vocational qualifications**

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