



ONTARIO COLLEGE OF TRADES

ORDRE DES MÉTIERS DE L'ONTARIO

Apprenticeship
Training Standard

Schedule of Training

Information Technology
Contact Centre Sales
Agent

Trade Code: 634D

Development Date: 2011

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PREFACE

This Schedule of Training was developed by the Programs Branch of the Ministry of Training, Colleges, and Universities (MTCU), in partnership with the Industry Advisory Committee and in consultation with representatives from the industry. This document is intended to be used by apprentice, supervisor/trainer and sponsor/employer as a "blueprint" for training and as a prerequisite for completion and certification.

This training document becomes the apprentice's only record of workplace training performance.

Supervisor/trainer and apprentice are required to sign off and date the skill following each successful acquisition unless a skill is marked shaded (optional).

The care and maintenance of this training document are the joint responsibility of the apprentice and the sponsor/employer. By signing off the skill, the supervisor/trainer and the apprentice are indicating that the apprentice has demonstrated competence of the skill. This Schedule of Training has been developed specifically for documenting the apprentice's acquisition of skills of the trade.

Please Note: Apprenticeship Training and Curriculum Standards were developed by the Ministry of Training, Colleges and Universities (MTCU). As of April 8th, 2013, the Ontario College of Trades (College) has become responsible for the development and maintenance of these standards. The College is carrying over existing standards without any changes.

However, because the Apprenticeship Training and Curriculum Standards documents were developed under either the Trades Qualification and Apprenticeship Act (TQAA) or the Apprenticeship and Certification Act, 1998 (ACA), the definitions contained in these documents may no longer be accurate and may not be reflective of the Ontario College of Trades and Apprenticeship Act, 2009 (OCTAA) as the new trades legislation in the province. The College will update these definitions in the future.

Meanwhile, please refer to the College's website (<http://www.collegeoftrades.ca>) for the most accurate and up-to-date information about the College. For information on OCTAA and its regulations, please visit: <http://www.collegeoftrades.ca/about/legislation-and-regulations>

DEFINITIONS

ACA

Apprenticeship and Certification Act, 1998

Certificate of Apprenticeship (C of A)

Certification issued to individuals who have demonstrated that they have completed an apprenticeship in Ontario.

Certificate of Qualification (C of Q)

Certification issued to C of Q applicants who have achieved a passing grade on the certification exam for their trade.

Competence

The ability of an individual to perform a skill repeatedly and without assistance in the workplace to the standard set out in the Training Standard or Schedule of Training.

Competency Analysis Profile

A document that identifies the training needs of an individual trade and details the skills/skill sets that must be demonstrated.

Industry Committee (IC) - under the ACA and Provincial Advisory Committee (PAC) under the TQAA

Under the ACA and TQAA, the Minister may appoint a provincial committee in any trade or group of trades to advise the Minister in matters relating to the establishment and operation of apprenticeship training programs and trades qualifications.

Journey person or Equivalent

A person who has acquired the knowledge and skills in a trade, occupation or craft as attested to by a provincial or territorial authority.

Mandatory Skills

Status assigned to unshaded individual skills, skill sets or general performance objective which must be signed off for the apprentice to complete their program.

Optional Skills

Status assigned to shaded individual skills, skills sets or general performance objective for which sign-off is not required for the apprentice to complete the program.

Schedule of Training

An apprenticeship training standard includes the on-the-job performance objectives and off-the-job learning outcomes.

Sign-off

Signature of the sponsor/employer of record or an individual to whom that sponsor or employer has delegated signing authority indicating an apprentice's achievement of competence.

Skill

Individual skill described in the Schedule of Training (note: does not mean the larger skill groups referred to in the Schedule of Training as Skill Sets, Training Units, or General Performance Objective, but the individual skills that make up those groups).

Skill Sets

Group of individual skills found in the Schedule of Training (may also be called Training Unit or General Performance Objective).

Skill Set Completion Form (and Learning Outcome Completion Form)

Lists all skill sets and includes space for sign-off by sponsor/employer of record.

Sponsor/Employer

Means a person that has entered into a registered training agreement under which the person is required to ensure that an individual is provided with workplace-based training in a trade, other occupation or skill set as part of an apprenticeship program approved by the Director.

Sponsor/Employer of Record

Refers to the sponsor or employer documented as the signatory to the current training agreement or contract. In order for a sponsor/employer to be considered for the training of apprentices, they must identify that the workplace has qualified journeypersons or equivalent on site and can identify that the workplace has the tools, equipment, materials and processes that have been identified by Provincial Advisory Committees (PACs) or Industry Committees (ICs) to be required for the trade.

Supervisor

An individual, who oversees the execution of a task, oversees the actions or work of others.

Trainer

A qualified trainer in a compulsory trade is a journeyperson with a Certificate of Qualification or in a voluntary trade is an individual who is considered equivalent to a journeyperson with a Certificate of Qualification.

TQAA

Trades Qualification and Apprenticeship Act.

Training Standard

A document that has been written in concise statements, which describe how well an apprentice must perform each skill in order to become competent. In using the document, trainers will be able to ensure that the apprentice is developing skills detailed for the occupation.

IMPORTANT DIRECTIONS

Apprentice

1. All complete skills or skill sets must be signed and dated by both the apprentice and sponsor/employer when either all terms of the contract have been completed or the apprentice leaves the employ of the employer.
2. It is the responsibility of the apprentice to inform the local Apprenticeship Client Services Office regarding the following changes:
 - change of sponsor/employer address
 - change of apprentice name or address
 - transfer to a new sponsor/employer
3. The Skill Set Completion Form and Learning Outcome Completion Form must be completed and signed by the current sponsor/employer and presented to the local Apprenticeship Office at the fulfillment of all terms of a Training Agreement.
4. The apprentice completion form with the Completed and Authorized Schedule of Training must be presented to the local Apprenticeship Office.

Sponsors/Employers and Supervisors/Trainers

The Schedule of Training identifies skills and supporting learning outcomes required for this trade/occupation and its related training program.

This Schedule of Training has been written in concise statements which describe how an apprentice must perform each skill/outcome in order to become competent. Competence means being able to perform the task to the required standard.

In using this Schedule of Training, supervisors/trainers will be able to ensure that the apprentice is developing the skills detailed for the trade/occupation.

Supervisors/Trainers and apprentices are required to sign off and date the skills following each successful acquisition.

Sponsors/Employers participating in this training program will be designated as the Signing Authority and are required to attest to successful achievement by signing the appropriate box included at the end of each skill set.

NOTICE OF COLLECTION OF PERSONAL INFORMATION

1. At any time during your apprenticeship training, you may be required to show this training standard to the Ministry of Training, Colleges and Universities (the Ministry). You will be required to disclose the signed Apprenticeship Completion form to the Ministry in order to complete your program. The Ministry will use your personal information to administer and finance Ontario's apprenticeship training system, including confirming your completion and issuing your certificate of apprenticeship.
2. The Ministry will disclose information about your program completion and your certificate of apprenticeship to the Ontario College of Trades, as it is necessary for the College to carry out its responsibilities.
3. Your personal information is collected, used and disclosed by the Ministry under the authority of the Ontario College of Trades and Apprenticeship Act, 2009.
4. Questions about the collection, use and disclosure of your personal information by the Ministry may be addressed to the:

Manager, Employment Ontario Contact Centre
Ministry of Training, Colleges and Universities
33 Bloor St. E, 2nd floor, Toronto, Ontario M7A 2S3
Toll-free: 1-800-387-5656; Toronto: 416-326-5656
TTY: 1-866-533-6339 or 416-325-4084.

ROLES & RESPONSIBILITIES OF APPRENTICE, SPONSOR/EMPLOYER AND SUPERVISOR/TRAINER

Apprentice “An apprenticeship is learning on-the-job.”

- Practice safe work habits.
- Use your apprenticeship Schedule of Training as a journal to keep track of which skills you have achieved.
- Talk over your training plan with your Training Consultant, Employer, Union, or Sponsor.
- Know what tools are required for your trade and how to use them.
- Ask questions and keep asking.
- Talk to your employer about your training needs.
- Demonstrate enthusiasm and good work habits.
- Ensure that you and your supervisor/trainer sign off skill/skill sets upon demonstration of competency.

Sponsor/Employer “Training is an investment.”

- Demonstrate safe work habits.
- Attest to successful achievement by signing the skill/skills sets.
- Provide opportunities and time for the apprentice to learn the trade.
- Offer practical trade training experiences that cover all of the skill sets.
- Foster work ethics that support training while minimizing productivity losses.
- Set out clear expectations, then recognize or reward performance excellence.
- Involve both the apprentice and supervisor/trainer in developing the training plan.
- Use the Schedule of Training as a monitoring tool and part of regular performance evaluations.
- Select supervisors/trainers with good communication skills and who work well with others.
- Encourage supervisors/trainers to take upgrading courses - (e.g. Train the Trainer, Mentor, Coach, etc).
- Complete the Skill Set Completion Form once the apprentice has demonstrated competency in the training.
- Ensure that the apprentice always works under the direction of or has access to a qualified supervisor/trainer.
- Vary the apprentice’s exposure to all the skills set out in the Schedule of Training.

Supervisor/Trainer

- Demonstrate safe work habits.
- Treat apprentices fairly and with respect.
- Use the Schedule of Training as a guide to evaluating competence in each skill area. In using the Schedule of Training, supervisors/trainers will be able to ensure that the apprentice is developing skills detailed for the trade/occupation.
- Review the Schedule of Training with the apprentice and develop a training plan.
- Respond fully to all questions.
- Be patient. Explain what is to be done then, show how it is done, and then let the apprentice demonstrate the task.
- Provide continuous feedback.
- Sign off individual skills/skill sets once the apprentice demonstrates competence in the skill.

Suggestions for Assessing the Progress of the Apprentice in the Workplace

- Use informal daily observation.
- Provide constructive feedback to build confidence.
- Allow the supervisor/trainer time to teach and demonstrate the skills.
- Take prompt action wherever problems occur.
- Conduct regular performance reviews involving the apprentice, supervisor/trainer and sponsor/employer.
- Use the Schedule of Training as the reference for establishing the competency of the apprentice.

SKILL SET COMPLETION FORM

SKILLS SETS	TITLE	SIGNING AUTHORITY
U6241.0	MAINTAIN A CONTACT CENTRE ENVIRONMENT	
U6242.0	COMMUNICATE	
U6243.0	PROVIDE CUSTOMER SERVICE	
U6244.0	PROVIDE SALES AND SERVICE	
U6245.0	CREATE AND MAINTAIN DOCUMENTATION	
U6246.0	SUPPORT OTHERS AND PLAN FOR PERSONAL DEVELOPMENT	
U6247.0	MAINTAIN PRIVACY AND SECURITY	

NOTE ON SHADED PERFORMANCE OBJECTIVES AND SKILLS:

- Shaded performance objectives and skill sets are optional. The shaded skills do not have to be demonstrated or signed-off for completion of the on-the-job component of the apprenticeship.
- The learning outcomes will cover all of the skill sets, both shaded and unshaded.

LEARNING OUTCOMES COMPLETION FORM

Date of Completion	Organization Name(s)	SIGNING AUTHORITY

APPRENTICE COMPLETION FORM

APPRENTICE NAME	
Print	
Signature	
Client ID	

Skill Sets and Learning Outcomes when completed should be signed by the Supervisor/Trainer and presented with this completion form to your local Apprenticeship Client Services Office. Any supporting documentation should also be attached.

In-school Completed Yes () No () Not applicable ()
(Proof to be provided)

Hours completed as Yes () No () Not applicable ()
Per Contract:

<u>SPONSOR/EMPLOYER INFORMATION</u>	
Name	
Address	
Telephone	
E-mail Address	
Signature of Signing Authority	

You will be required to disclose this signed form to the Ministry of Training, Colleges and Universities in order to complete your program. The Ministry will use your personal information to administer and finance Ontario's apprenticeship training system. For further information please see the notice/declaration for collection of personal information that is referenced in the table of contents of this training standard.

A. DESCRIPTION/DUTIES

An **INFORMATION TECHNOLOGY CONTACT CENTRE SALES AGENT** demonstrates competency in the following:

- Maintaining a contact centre environment
- Communicating
- Providing customer service
- Providing sales and service
- Creating and maintaining documentation
- Supporting others and planning for personal development
- Maintaining privacy and security

An **INFORMATION TECHNOLOGY CONTACT CENTRE SALES AGENT** demonstrates knowledge of:

- Information Technology Contact Centre Environment
- Communications
- Information Technology Contact Centre Technologies
- Workplace Professionalism
- Customer Service
- Sales Techniques

BENCHMARK/GUIDELINE TOTAL TRAINING TIMEFRAMES: (ON-THE-JOB AND OFF-THE-JOB):

4000 hours - Includes 180 hours of in-school training.

B. ON-THE-JOB PERFORMANCE OBJECTIVES

U6241.0 MAINTAIN A CONTACT CENTRE ENVIRONMENT

1.1 Identify and take preventive action against potential workplace environmental, health and safety hazards in accordance with company policies and procedures, Workplace Hazardous Materials Information System (WHMIS) guidelines, the *Occupational Health & Safety Act* and other legislation.

Date Completed	Apprentice	Supervisor/Trainer
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1.2 Maintain standard contact centre metrics for adherence, conformance and attendance by working within specific measurable competencies in accordance with program requirements and company policies and procedures.

Date Completed	Apprentice	Supervisor/Trainer
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1.3 Maintain line of business performance metrics including quality, resolution rate, average handle time, and customer satisfaction by working within specific measurable competencies in accordance with program requirements and company policies and procedures.

Date Completed	Apprentice	Supervisor/Trainer
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1.4 Use workstation technology including telephony and computer applications to enhance performance while adhering to real time management strategies, call states, and call length in accordance with company policies and procedures.

Date Completed	Apprentice	Supervisor/Trainer
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1.5 Adjust workstation equipment including chairs, pointing devices, monitors, telephones and keyboards in accordance with personal needs, health and safety legislation and company policies.

Date Completed	Apprentice	Supervisor/Trainer
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1.6 Report adverse environmental conditions including lighting, temperature, odour and noise levels by communicating with supervisors and health and safety representatives in accordance with company policies and procedures.

Date Completed	Apprentice	Supervisor/Trainer
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1.7 Maintain a clean and sanitary workstation by removing waste and recyclables and wiping down hardware and desk surfaces with sanitary wipes at the beginning and end of each shift in accordance with company policies and procedures.

Date Completed	Apprentice	Supervisor/Trainer
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1.8 Notify the help desk of hardware and software access and functionality concerns including application access, password resets, system latency, non-functioning hardware and missing hardware by using telephones, e-mail, tracking logs and verbal communication in accordance with company policies and procedures.

Date Completed	Apprentice	Supervisor/Trainer
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U6242.0 COMMUNICATE

2.1 Gather information through active listening and interpretation of customer communications by focusing to avoid distractions, interrupting only to redirect or refocus, carefully clarifying, paraphrasing and summarizing when necessary, visualizing users' concerns and requests based on description of the issues and recording information to assist in accurate interpretation in accordance with company policies and procedures.

Date Completed	Apprentice	Supervisor/Trainer
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2.2 Speak effectively by using professional business language with a pleasant tone, clarity, volume and pace, avoiding use of jargon and creating simple visuals to illustrate solutions while leading a client through procedures by using telephones, on-line applications and voice mail recordings in accordance with company policies and procedures.

Date Completed	Apprentice	Supervisor/Trainer
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2.3 Prepare written and typed communications including e-mail, memos, letters, progress reports and incident reports in business and technical language by recording all information accurately in accordance with the company's internal and external forms and formats.

Date Completed	Apprentice	Supervisor/Trainer
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2.4 Clarify requests and concerns from customers by reviewing case histories, previous notations and correspondence in accordance with company policies and procedures.

Date Completed	Apprentice	Supervisor/Trainer
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2.5 Clarify goals and objectives using contact centre performance metrics by interpreting reports, dashboards and other information in accordance with client and departmental requirements.

Date Completed	Apprentice	Supervisor/Trainer
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2.6 Apply company and client information including policies and procedures, standard operating procedures, fact sheets, business management systems, bulletins, reminders and technical manuals in accordance with job requirements.

Date Completed Apprentice Supervisor/Trainer

2.7 Respond to real-time information and changes by reviewing e-mails, websites and internal communications, judging the relevance of information, and applying information in accordance with company policies and procedures.

Date Completed Apprentice Supervisor/Trainer

2.8 Complete self-guided training modules and continuing education including on-line and classroom-based training in accordance with client and company requirements.

Date Completed Apprentice Supervisor/Trainer

U6243.0 PROVIDE CUSTOMER SERVICE

3.1 Build relationships with customers by listening attentively, asking questions, paraphrasing and seeking clarification, interpreting, analyzing and evaluating information provided, and identifying the product and/or solution in accordance with company policies and procedures.

Date Completed	Apprentice	Supervisor/Trainer
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3.2 Provide clear and accurate information to customers by using professional etiquette, effective speaking and listening skills, adapting communication styles to suit customer needs and communicating realistic expectations to customers in accordance with client standards.

Date Completed	Apprentice	Supervisor/Trainer
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3.3 Discover and validate customer needs by using effective reading, listening and questioning techniques, collecting customer information, qualifying and building the right solutions, providing direct advice and guidance, and escalating issues in accordance with established customer service strategies and company policies and procedures.

Date Completed	Apprentice	Supervisor/Trainer
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3.4 Respond to customers within service guidelines by prioritizing tasks, developing strategies to cope with multi-tasking, scheduling and coordinating response times, escalating issues and conducting quality service follow-up in accordance with company policies and procedures.

Date Completed	Apprentice	Supervisor/Trainer
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3.5 Control call flow by following established call flow strategies and call handling techniques in accordance with company policies and procedures.

Date Completed	Apprentice	Supervisor/Trainer
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3.6 Defuse and handle difficult and angry customers by applying specialized call handling/problem resolution/objection handling techniques in accordance with company policies and procedures.

Date Completed

Apprentice

Supervisor/Trainer

U6244.0 PROVIDE SALES AND SERVICE

4.1 Facilitate sales and customer order fulfillment by acting as a liaison between the customer and other departments, by maintaining monitoring and tracking systems to resolve customer issues and by verifying results through quality audits in accordance with established customer service strategies and company policies and procedures.

<hr/> Date Completed	<hr/> Apprentice	<hr/> Supervisor/Trainer
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4.2 Offer solutions to customers needs by matching the features and benefits of appropriate products, summarizing and validating customers' acceptance and resolving any objections in accordance with established sales strategy formulas and company policies and procedures.

<hr/> Date Completed	<hr/> Apprentice	<hr/> Supervisor/Trainer
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4.3 Confirm the solutions and close the sales summarizing the solutions, validating the customers' acceptance to the highest level of commitment and confirming resolution to any objections in accordance with sales strategy formulas, company policies and procedures.

<hr/> Date Completed	<hr/> Apprentice	<hr/> Supervisor/Trainer
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4.4 Meet or exceed performance metrics including call handling, close rate, conversion rate, financing options, service offerings and customer experience related metrics by using sales tracking systems to manage personal sales performance in accordance with job requirements, company policies and procedures.

<hr/> Date Completed	<hr/> Apprentice	<hr/> Supervisor/Trainer
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U6245.0 CREATE AND MAINTAIN DOCUMENTATION

5.1 Create customer-related documentation including the nature of concerns, steps taken, outcomes of requests and correspondence including e-mails and letters by using internal and external forms and formats in accordance with company policies and procedures.

Date Completed	Apprentice	Supervisor/Trainer
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5.2 Create client-related documentation including database management information, unusual circumstances, case notes and correspondence including letters and e-mails by using internal and external forms and formats in accordance with client standards.

Date Completed	Apprentice	Supervisor/Trainer
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5.3 Create company-related documentation including non-conformance logs and feedback to peers and teams by using internal and external forms and formats in accordance with company policies and procedures.

Date Completed	Apprentice	Supervisor/Trainer
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U6246.0 SUPPORT OTHERS AND PLAN FOR PERSONAL DEVELOPMENT

6.1 Support co-workers who are learning new skills by demonstrating and clarifying workplace practices, procedures and requirements in accordance with company policies and procedures.

Date Completed _____
Apprentice _____
Supervisor/Trainer

6.2 Develop a personal plan for performance improvement to advance through apprenticeship training and other job enhancement programs by applying feedback received from coaching sessions, quality monitoring and customers in accordance with company policies and procedures.

Date Completed _____
Apprentice _____
Supervisor/Trainer

U6247.0 MAINTAIN PRIVACY AND SECURITY

7.1 Protect personal and confidential information in accordance with company privacy policies and procedures.

Date Completed _____
Apprentice _____
Supervisor/Trainer

7.2 Maintain security protocols including information technology and building security policies in accordance with company policies and procedures.

Date Completed _____
Apprentice _____
Supervisor/Trainer

C. LEARNING OUTCOMES

Introduction

The curriculum section of this document is organized into **2 levels** of training, each including reportable subjects containing Learning Outcomes to reflect the On-the-Job Performance Objectives. The hours charts indicate how the curriculum can be delivered in the block release format and summarize the hours of training for each reportable subject by level. Since the reportable subjects are all divisible by three they can be adapted to accommodate a more flexible training delivery other than block release.

Level 1 curriculum is designed as a common core for Information Technology Contact Centre Customer Service Agent, Sales Agent and Technical Support Agent.

Level 2 curriculum is designed specifically for Sales Agent.

Each reportable subject and learning outcome identifies a recommended number of training hours. The division of the curriculum into reportable subjects follows a natural progression of learning through the training program. This structure will allow training centres and apprentices flexibility in program delivery while still observing the importance of sequencing learning in a logical progression.

The curriculum is framed by and includes specific references to terminal performance objectives in the Schedule of Training for Information Technology Contact Centre Sales Agent. However, the curriculum identifies only the learning that takes place off the job, in a training environment. The in-school program focuses primarily on the theoretical knowledge required to master the performance objectives in Part B of this document. Employers are expected to extend the apprentice's knowledge and skills through appropriate practical training on the work site. Regular evaluations of the apprentices' knowledge and skills are conducted throughout training to assure that all apprentices have achieved the Learning Outcomes identified in the curriculum.

Program Summary of Reportable Subjects

Number	Reportable Subjects	Hours Theory	Hours Practical	Total Hours
	Level 1 – Common Core			
S0791.0	Information Technology Contact Centre Environment	30	0	30
S0792.0	Communications	30	15	45
S0793.0	Information Technology Contact Centre Technologies	18	18	36
S0794.0	Workplace Professionalism	18	0	18
S0795.0	Customer Service	21	0	21
	Total Hours Level 1 (Common Core)	117	33	150
	Level 2 – Sales Agent			
S0816.0	Sales Techniques	30	0	30
	Total Hours Level 2	30	0	30
	Total Hours	147	33	180

Information Technology Contact Centre Sales Agent

Level 1

Number: **S0791.0**

Reportable Subject: **INFORMATION TECHNOLOGY CONTACT CENTRE ENVIRONMENT**

Duration: 30 Total Hours Theory: 30 Hours Practical: 0 Hours

Prerequisites: None

Evaluation Structure:

Formative Assessment (Quizzes and Assignments)	75%
Final Assessment	25%

S0791.1 Information Technology Contact Centre Environment

Duration: Total Hours: 24

Cross Reference to On-the-Job Performance Objectives: 1.2, 1.3, 1.4, 1.8, 2.8

GENERAL LEARNING OUTCOME

Upon successful completion the apprentice is able to describe how an IT contact centre functions and the roles and responsibilities of customer service agents, sales agents and technical support agents within an IT contact centre environment.

LEARNING OUTCOMES

- 1.1.1 Describe different types of contact centres.
 - inbound and outbound
 - in-house and outsourced
- 1.1.2 Describe the roles of customer service agents, sales agents and technical support agents.
- 1.1.3 Identify the workplace pressures specific to a contact centre.
- 1.1.4 Describe strategies for dealing with workplace pressures.
- 1.1.5 Identify the benefits of developing a network of peers and support resources.
- 1.1.6 Identify various types of products or services supported by a contact centre.
- 1.1.7 Identify the roles and responsibilities of support teams.
- 1.1.8 Define common contact centre terminology and metrics.
- 1.1.9 Describe IT contact centre software / hardware technology including:
 - customer relationship management (CRM) / information management software
 - knowledge management including on-line reference materials
 - quality monitoring
 - workforce management
 - telephony
 - network operations

S0791.2 Privacy and Security

Duration: Total Hours: 6

Cross Reference to On-the-Job Performance Objectives: 1.8, 6.1, 6.2

GENERAL LEARNING OUTCOME

Upon successful completion the apprentice is able to recognize potential privacy and security issues within an IT contact centre environment.

LEARNING OUTCOMES

- 1.2.1 Explain the significance of federal and provincial legislation that outlines the responsibilities of both employers and employees as it relates to privacy and security in an IT contact centre environment.
- 1.2.2 Explain the importance and relevance of compliance, security, privacy, confidentiality and disaster recovery policies within an IT contact centre environment.
- 1.2.3 Describe ethical issues related to information technology.
- 1.2.4 Outline personal and professional ramifications of unethical practices.

Number: **S0792.0**

Reportable Subject: **COMMUNICATIONS**

Duration: 45 Total Hours Theory: 30 Hours Practical: 15 Hours

Prerequisites: None

Evaluation Structure:

Formative Assessment (Quizzes and Assignments)	45%
Practical Assessment	30%
Final Assessment	25%

S0792.1 Effective Listening

Duration: Total Hours: 15

Cross Reference to On-the-Job Performance Objectives: 2.1, 2.3, 3.1, 3.2, 3.3, 3.4, 3.7

GENERAL LEARNING OUTCOME

Upon successful completion the apprentice is able to use active listening skills when interacting with customers, colleagues, supervisors and industry representatives in an IT contact centre environment.

LEARNING OUTCOMES

- 2.1.1 Identify the elements of active listening and their importance.
- 2.1.2 Outline the procedures for applying active listening skills.
- 2.1.3 Describe the use of minimal encouragers when applying active listening skills.
- 2.1.4 Identify core issues expressed by customers, colleagues, supervisors and industry representatives.
- 2.1.5 Interpret instructions and procedures.

S0792.2 Verbal Communications

Duration: Total Hours: 15

Cross Reference to On-the-Job Performance Objectives: 3.1, 3.2, 3.3, 3.4, 3.7

GENERAL LEARNING OUTCOME

Upon successful completion the apprentice is able to use professional business language and information gathering techniques when interacting verbally with customers, colleagues, supervisors and industry representatives in an IT contact centre environment.

LEARNING OUTCOMES

- 2.2.1 Describe questioning techniques and when to use them.
- 2.2.2 Apply questioning techniques to gather information about the customer, customer issues or products using professional business language, speaking style, tone, volume and clarity.
- 2.2.3 Summarize detailed or complex information to confirm accurate interpretation and understanding of information provided.
- 2.2.4 Explain technical instructions within the context of resolving customer issues.

S0792.3 Written Communications

Duration: Total Hours: 15

Cross Reference to On-the-Job Performance Objectives: 2.3, 2.4, 2.5, 2.6, 2.7, 2.8, 4.1, 4.2, 4.3

GENERAL LEARNING OUTCOME

Upon successful completion the apprentice is able to use reading, comprehension and writing skills to interact with customers, colleagues, supervisors and industry representatives in an IT contact centre environment.

LEARNING OUTCOMES

- 2.3.1 Describe the importance of reading, comprehension and writing skills within an IT contact centre environment.
- 2.3.2 Create written case notes that summarize the steps taken to address the issues and the outcomes of customer service.
- 2.3.3 Simplify detailed or complex written communications.
- 2.3.4 Prepare various types of internal correspondence using professional language in response to a variety of customer needs.

Number: **S0793.0**

Reportable Subject: **IT CONTACT CENTRE TECHNOLOGIES**

Duration: 36 Total Hours Theory: 18 Hours Practical: 18 Hours

Prerequisites: None

Evaluation Structure:

Formative Assessment (Quizzes and Assignments)	25%
Practical Assessment	50%
Final Assessment	25%

S0793.1 Technological Resources

Duration: Total Hours: 12

Cross Reference to On-the-Job Performance Objectives: 1.4, 1.5, 1.8, 2.1, 3.6, 3.8, 4.1, 4.2, 4.3

GENERAL LEARNING OUTCOME

Upon successful completion the apprentice is able to use technology and on-line resources within an IT contact centre environment.

LEARNING OUTCOMES

- 3.1.1 Use internet and intranet to research and obtain information.
- 3.1.2 Locate required information on approved websites.
- 3.1.3 Explain the use of key words and how search results are organized.
- 3.1.4 Describe features of different search portals.
- 3.1.5 Describe the characteristics of customer relationship management (CRM)/ information management systems and its relevance within a contact centre environment.

S0793.2 Technical Systems

Duration: Total Hours: 12

Cross Reference to On-the-Job Performance Objectives: 1.3, 1.4, 1.8, 3.8, 4.1, 4.2, 4.3

GENERAL LEARNING OUTCOME

Upon successful completion the apprentice is able to use information management systems and technologies within an IT contact centre environment.

LEARNING OUTCOMES

3.2.1 Describe the following telephony systems.

- interactive voice response (IVR)
- automatic call distributor (ACD)
- skills based routing
- computer telephony integration (CTI)
- predictive diallers
- private branch exchange (PBX)

3.2.2 Use the basic features of customer relationship management (CRM)/information management systems.

3.2.3 List types of data stored in customer relationship management (CRM)/information management systems.

3.2.4 Describe the relationship between customer data and transactional uses.

3.2.5 Describe the supporting contact centre systems that include:

- quality control monitoring
- workforce management/scheduling
- email management
- statistics and report management

S0793.3 Documentation

Duration: Total Hours: 12

Cross Reference to On-the-Job Performance Objectives: 3.8, 4.1, 4.2, 4.3

GENERAL LEARNING OUTCOME

Upon successful completion the apprentice is able to create and maintain documentation using information management systems and technological resources within an IT contact centre environment.

LEARNING OUTCOMES

3.3.1 Use customer relationship and information management systems to:

- create and maintain customer records
- search databases for customer accounts
- validate customer identities
- edit and update customer information
- create and maintain transactional functions

3.3.2 Use information management systems and technological resources including templates to create and maintain internal and external business documentation.

Number: **S0794.0**

Reportable Subject: **WORKPLACE PROFESSIONALISM**

Duration: 18 Total Hours Theory: 18 Hours Practical: 0 Hours

Prerequisites: None

Evaluation Structure:

Formative Assessment (Quizzes and Assignments)	75%
Final Assessment	25%

S0794.1 Teamwork

Duration: Total Hours: 9

Cross Reference to On-the-Job Performance Objectives: 5.1, 5.2

GENERAL LEARNING OUTCOME

Upon successful completion the apprentice is able to interact with others to build professional relationships that help to meet performance objectives within an IT contact centre environment.

LEARNING OUTCOMES

- 4.1.1 Describe the importance of a team approach to achieving objectives.
- 4.1.2 Outline strategies for fostering cooperation in a team environment.
- 4.1.3 Outline the importance of clear communication among team members.
- 4.1.4 Describe coaching and mentoring techniques within the workplace.
- 4.1.5 Outline the importance of increasing awareness of and sensitivity to workplace diversity issues.

S0794.2 Time Management

Duration: Total Hours: 9

Cross Reference to On-the-Job Performance Objectives: 5.1, 5.2

GENERAL LEARNING OUTCOME

Upon successful completion the apprentice is able to manage time to maximize daily performance within an IT contact centre environment according to industry resources, procedures and standards.

LEARNING OUTCOMES

- 4.2.1 Describe time management requirements within an IT contact centre environment including:
- agent schedule adherence in the achievement of service level
 - forecasting call volume and its impact on agent scheduling
 - average handle time and its impact on service level
- 4.2.2 Outline strategies to achieve targets for average handle time and after-call work.
- 4.2.3 Describe strategies for managing several tasks simultaneously.

Number: **S0795.0**

Reportable Subject: **CUSTOMER SERVICE**

Duration: 21 Total Hours Theory: 21 Hours Practical: 0 Hours

Prerequisites: None

Evaluation Structure:

Formative Assessment (Quizzes and Assignments) 75%

Final Assessment 25%

S0795.1 Customer Service

Duration: Total Hours: 9

Cross Reference to On-the-Job Performance Objectives: 3.1, 3.2, 3.3, 3.4, 3.5, 3.7, 3.8

GENERAL LEARNING OUTCOME

Upon successful completion the apprentice is able to use strategies for building customer relationships, identifying customer needs and providing quality customer service in an IT contact centre environment.

LEARNING OUTCOMES

- 5.1.1 Explain the importance of customer satisfaction and its impact on customer retention.
- 5.1.2 Describe the relative value of customer retention compared to the cost of new customer acquisition.
- 5.1.3 Identify the roles of customer service agents, sales agents and technical support agents in customer retention.
- 5.1.4 Identify the value of customer information for all service strategies.
- 5.1.5 Identify the relationship of customer needs to services provided.
- 5.1.6 Identify several strategies that build rapport and enhance customer relationships.
- 5.1.7 Explain common practices for identifying and validating customer needs.
- 5.1.8 Explain the value of identifying unstated customer needs.

S0795.2 Handling Difficult Customers

Duration: Total Hours: 12

Cross Reference to On-the-Job Performance Objectives: 3.1, 3.2, 3.3, 3.4, 3.5, 3.7

GENERAL LEARNING OUTCOME

Upon successful completion the apprentice is able to describe basic strategies and techniques for handling difficult customers within an IT contact centre environment.

LEARNING OUTCOMES

- 5.2.1 Identify problem resolution techniques and resources.
- 5.2.2 Review customer data to identify history related to current issues.
- 5.2.3 Describe escalation strategies used for resolving customer issues.
- 5.2.4 Describe how an individual's behaviour impacts the behaviour of others.
- 5.2.5 Describe techniques used to control agent emotions during customer interactions.
- 5.2.6 Describe techniques used for calming customer emotions during customer interactions.
- 5.2.7 Identify common causes of customer dissatisfaction.

Information Technology Contact Centre Sales Agent

Level 2

Number: **S0816.0**

Reportable Subject: **SALES TECHNIQUES**

Duration: 30 Total Hours Theory: 30 Hours Practical: 0 Hours

Prerequisites: Level 1

Evaluation Structure:

Formative Assessment (Quizzes and Assignments) 75%

Final Assessment 25%

S0816.1 In-bound and Out-bound Sales Calls

Duration: Total Hours: 30

Cross Reference to Training Standard: 4.1, 4.2, 4.3, 4.4

GENERAL LEARNING OUTCOME

Upon successful completion the apprentice is able to describe the common elements of the sales cycle including determining and validating customers' needs, creating solutions and closing the sale.

LEARNING OUTCOMES

- 6.1.1 Identify methodologies for determining solutions to customers' needs.
- 6.1.2 Outline procedures for resolution to sales objections.
- 6.1.3 Describe "up selling" techniques.
- 6.1.4 Describe procedures for closing the sale.
- 6.1.5 Explain marketing and sales objectives.
- 6.1.6 Explain the relevance of profit margins to sales targets.
- 6.1.7 Describe market segmentation and target marketing.
- 6.1.8 Explain the purpose of the sales verification process when selling by telephone.

APPRENTICE RECORD

APPRENTICE NAME (Print):

SPONSOR/EMPLOYER INFORMATION	
Training Agreement #	
Name	
Address	
Telephone	
E-mail Address	

SUMMARY OF TRAINING	
Employment Start Date	
Employment End Date	
Total hours of training & instruction between dates of employment.	

Date Completed

Apprentice

Supervisor/Trainer

APPRENTICE RECORD

APPRENTICE NAME (Print):

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