

Benefits of Accredited Training

BSc Hons in Customer Contact Planning and Management

*Delivered in partnership between Professional Planning
Forum and Ulster Business School, University of Ulster*

Authors: Colin Whelan & John Casey
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Why Accreditation?

Simply put, accreditation is value. Reaching into our public, private, and professional lives, accreditation is proof that a collegiate program has met certain standards necessary to produce graduates who are ready to enter their professions. Students who graduate from accredited programs have access to enhanced opportunities in employment; licensure, registration and certification; graduate education and global mobility.

Accreditation impacts:

- Students
- Programmes and Institutions
- Customer
- Professionals in Business and Industry.

Accreditation is an assurance that the professionals who work for us have a solid educational foundation and are capable of leading the way in innovation, emerging technologies, and in anticipating the needs of both internal and external customers.

University training provides students with a structured opportunity to learn. Accreditation adds value to this learning by formally recognising what the student knows or can do as a result of the training. Accredited training provides formal recognition of an individual's achievements. Accreditation shows that the student has reached a level of skill and competence assessed against internationally defined standards.

This programme recognises the glaring omission that there is no accredited development for analysts and team leaders in contact centres. Unlike finance, HR & IT professionals this leaves team leaders, planners, analysts feeling that their value is not seen by the company and often that their role is a stepping stone to a 'proper' career. This needs to change as without these people staying in position and treating it as a long term position the ongoing change and attrition can harm the operational results of the contact centre.

What are the Benefits of Accredited Training?

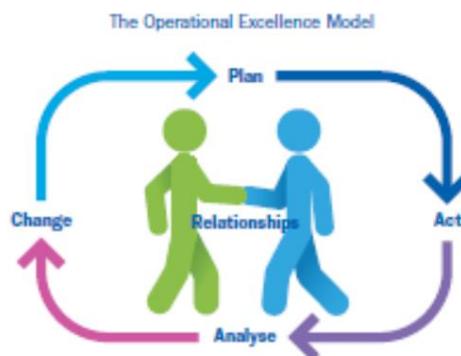
The students' knowledge and/or ability need to be tested against an agreed benchmark or standard in order to get the recognition of accreditation. This process of testing is known as assessment and is carried out by an external assessor (The Professional Planning Forum) and validated by the University of Ulster. Once the standards have been met, formal recognition is given by the awarding body (University of Ulster) that may provide the student with a qualification to prove their achievement.

This paper aims to explore the structured approach to developing this accredited programme for students by introducing:

- A model of good practice for the customer contact industry
- How to plan effectively for the customer contact environment
- Different types of operating options for the benefits of our colleagues, customer and company
- A range of approaches to learning and development

A model of good practice

The operational excellence model is the basic model of good practice for the design and delivery of any learning and is key to the values and principles of the Professional Planning Forum.



The operational excellence model:

1. Change (identification of learners training needs)
2. Plan (design of the training)
3. Act (delivery of the training)
4. Analyse (evaluation of the training)

Designing accredited training for the Customer Contact industry

Accreditation is not just about 'bolting on' some assessment, deciding to implement accredited training will bring in extra considerations at all stages of the training cycle. Proper planning the key to successful implementation of any training programme, but accreditation has some extra considerations.

Three key questions need to be addressed:

1 Why accredit Students' achievements?

Accredited training can bring about benefits to the student, the organisation and the customer. Being clear about the desired benefits helps to identify which kind of accreditation is most likely to bring about these results.

Benefits to Students

- Increased motivation and confidence in their role.
- Raised awareness of the importance of their role.

- Feel more valued through the organisation's investment in them.
- Greater satisfaction in their work.
- Improved employment/promotion prospects.
- Possible first step into further education/ training.

Benefits to the organisation

- Recognition internally and externally of the standard of skills/knowledge that Students bring to their work.
- Students are more effective as they develop their knowledge, skills and confidence which in turn helps to improve services
- Increased recruitment.
- Increased retention.
- Emphasised importance of students' role in the organisation.
- Fewer incidences of 'trouble shooting'.
- Enhanced reputation as an investor in people.
- Increased effectiveness of team.

Benefits to the customers

- Improved quality of activities/services.
- Increased range of services available.
- Reassurance of quality of students' work.
- Better relationships with happier students.

Not every kind of accredited training brings all the benefits listed in the table, and not every one of the benefits will be equally important to an organisation and its people. Students should be asked what they want or expect from accreditation, as successful accredited training cannot be implemented without their commitment. Working out what the organisation hopes to benefit from accredited training for its Students helps determine how much the organisation is prepared to invest in the process

The pursuit and development of accredited training for students should have management support and be compatible with the aims/vision of the organisation. This results in a greater chance of sustainability for the training and ongoing development of the organisation and its people

2 What is going to be accredited?

It is possible to accredit student's skills, knowledge, attitudes and/or understanding, but it is important to be realistic and focus on the key areas of the Student's role. For example, if students are providing advice and guidance on employment law, are their skills in giving advice and information accredited, or their knowledge of employment law? Or if students are leading sales teams, are their abilities in conversion accredited, or their skills as a leader? Being able to state explicitly what will be accredited helps determine both the most suitable type of accreditation and the most appropriate method of assessment.

3 How will students' achievements be accredited?

Having concluded what is to be accredited there are a number of choices to consider in deciding which accreditation route is best for the organisation and its people.

The first option is to source an existing accredited training programme, delivered by a training provider such as a college, university, institute of further and higher education, or another independent organisation.

The second option is to design and deliver internal or 'in-house' training and seek accreditation for it through an awarding body.

	Accessing existing accredited training	Designing an 'in-house' accredited programme
Advantages	<ul style="list-style-type: none"> • Training programmes have usually been 'tried and tested'. • Quick and easy to access as no development time is involved. • Access to specialist skills or knowledge that may not be available in the staff team of the organisation. • Quick and easy to access. • Cost effective for a small number of Students. 	<ul style="list-style-type: none"> • Can tailor the programme to the organisation's particular context/systems. • Programme can be tested and then adapted. • Design and delivery can take account of student's practical needs and preferences. • May be cheaper for a large number of students.
Disadvantages	<ul style="list-style-type: none"> • Can be expensive. • Little/no control over the content and/or quality of training, e.g. students may find some areas irrelevant, hard to compile assessment evidence for, or difficult to apply to their role. • Delivery times, location and/or methods may not suit the students. 	<ul style="list-style-type: none"> • Development and delivery can be time consuming. • Development may be regularly postponed if it is not considered a priority by management. • The subject 'experts' in the organisation might not have skills as trainers and/or assessors

Choosing an accreditation system

There are two options when developing an in-house accredited training programme for students. Both options involve testing a learner's knowledge, ability or understanding against an agreed standard. A standard of assessment is the benchmark against which the assessor makes a judgement about whether or not the learner has achieved and demonstrated a particular level of knowledge, ability or understanding.

BSc Programme



In January 2013, Academic Council approved the delivery of the BSc (Hons) in Customer Contact Planning and Management. The programme was designed in such a way as to allow various entrance and exit points and these will be explained later in the document. The rationale around this was to recognise the fact that students in employment may not be able to commit to 3 years of study and are happy to either gain accredited qualifications for the 3rd level study they can commit to, or they prefer to adopt a 'start and stop' approach and attain their qualification over a longer period of time. However this approach allows for customisation of parts of the programme to meet needs of specific organisations as well as providing 3rd level education to staff. The programme was designed following requests from Planning Forum members who wanted accredited recognition for the training they were undertaking. Following due diligence between the University and the Professional Planning Forum, a steering group of Planning Forum members was set up to assist with programme design. Members of this group included:

Nick Lane	Director of Strategy & Planning	EE
Simon Butler	Resource Planning Manager	Direct Line Group
Aaron Gourlay	Senior MI & Resource Analyst	Eurostar
Sven Hill	Business Intelligence Manager	Autoglass
Adrian Hawes	Contact Centre Planning Manager	Aviva
Jo Hale	Head of Contact Centre	RAC
Gerry Chambers	Resource Planning Manager	The Student Loans Company

These people assisted with understanding of the needs of organisations and defining the persona of what graduates at each of the levels would be.

Objectives

This is summarised in the following table – please bear in mind that Levels 4,5,6 align with years 1,2 & 3 of a traditional degree programme.

	Level 4	Level 5	Level 6
WHO are we targeting?	Primarily agent/entry grade but available to anyone where appropriate.	Senior agents, team leaders, analysts and managers	Senior analysts and managers.
WHAT is the learning focus?	Understanding the functions within a customer contact centre, the industry scope and the range of skills required.	A specific focus on the planning, performance and service delivery aspects of the industry, the key skills requirement.	A broader management focus introducing a range of operational and organisational skills.
WHY is this important?	Possessing the personal and professional skills of the role and recognising the potential career opportunities.	These are the foundations for a successful career in the industry and underpin all operational and strategic decision-making.	This is the catalyst to acquire a wider management skill set, whilst still maintaining an industry and organisational focus.
WHAT are the outputs?	Career identification, greater role satisfaction and reduced attrition for the industry.	Aspiring managers with the fundamental skills necessary to operate an effective customer contact centre.	Graduates possessing a broad management competence with a specific focus on the industry.

Course Module Examples

Advanced Diploma



Students partaking of study at this level can expect to attain the following learning objectives:

MODULE TITLE: Operations and Quality Systems

AIMS

The aim of this module is to provide participants with both the knowledge of effective improvement activities, and the understanding of the contexts in which they may be used. The function under consideration is that part of the customer contact centre that focuses on effectiveness and customer service as a basis of creating business profitability and ensuring value for money.

This module is concerned with the design, planning and control of the operational processes, the effective use of resources and raising the awareness of competencies, capabilities and innovation that are essential in achieving customer satisfaction.

LEARNING OUTCOMES

A successful student should be able to demonstrate:

KNOWLEDGE AND UNDERSTANDING

- K1 Analyse the context within which activity occurs and be able to make the connection between quality, outputs and customers.
- K2 Apply appropriate improvement techniques to organisational capabilities to ensure the effective and efficient operations.
- K3 Monitor activity and apply quality requirements to improve organisational performance
- K4 Define the principles underpinning effective organisational performance

INTELLECTUAL QUALITIES

- I1 Analyse concepts, methods and experience of organisational performance
- I2 Critically evaluate the contribution of this particular business function to an organisation
- I3 Analyse and synthesise information from different sources.

PROFESSIONAL/PRACTICAL SKILLS

- P1 Identify significant sources of, and pressures for improvement that impact on the organisation
- P2 Apply a variety of performance and improvement techniques to an identified scenario
- P3 Develop a strategy and a plan that will guide the improvement and performance process in his/her organisation
- P4 Identify, describe, analyse and respond appropriately to sources of resistance to the improvement(s)

TRANSFERABLE SKILLS

- T1 Communication effectively drawing on academic conventions as appropriate

- T3 Capacity to evaluate complex situations
- T4 Articulate concepts concisely
- T5 Infer information from data

CONTENT

Strategic Thinking of Operations, Performance

- The strategic importance of operations management and performance measurement
- Performance and customer requirements
- Examples of 'knowledge' organisations

Improvement and Performance Concepts

- Origins and current thinking
- Application and relevance

Improvement and Performance Models

- Overview of models
- Application of models in a customer contact environment

The Improvement Challenge:

- How operations contribute to competitive advantage
- Formulating an operations strategy
- Implementation of strategies.

MODULE TITLE: Customer Contact Technology

AIMS

This module introduces students to the wide and evolving range of customer contact technology available. It highlights the intended use of each system, explores issues, challenges and benefits of technology integrating with each other. Students will be encouraged to look beyond the technical details and explore the rationale, benefits and business case for using various technology systems within organisations.

Students do not necessarily need to have much technical ‘how it works’ knowledge, but should have a basic understanding of ‘what it does’ – the features, applications and business benefits of each system.

KNOWLEDGE AND UNDERSTANDING

- K1 Understand the benefits of individual systems and why they would / would not work within individual organisations
- K2 Link the technological solutions to current and future business processes

INTELLECTUAL QUALITIES

- I1 Identify best fit solutions for individual organisations
- I2 Develop SWOT analysis for individual technology packages

PROFESSIONAL/PRACTICAL SKILLS

- P1 Develop ‘proof of concept’ methodology to test-run technology
- P2 Present Implementation recommendations in a report format
- P3 Demonstrate appropriate interrogative skills when discussing technology with providers

TRANSFERABLE SKILLS

- T1 Appreciate the need to stay in tune with technology updates and new system concepts
- T2 Demonstrate ability to develop business plans for new technology implementation
- T3 Demonstrate the ability to consider wider business objectives and needs when looking at potential technology solutions

CONTENT

Technology Overview

- Choice – mixing and match components, software and solutions from best of class vendors
- Speed – easier integration of multiple applications
- Scalability – ramping up or down, centres ‘stitched together’ to manage volumes
- Cost savings – open system architectures, competition and innovation among vendors
- System redundancy – allowing for business continuity and disaster recovery within timeframes

- Migrating service provision
- System integration

Types of Technology

- Automated/Interactive Voice Response
- Computer telephony integration
- Call Switching And Distribution Management
- Web enabled Centres
- Cloud Technology
- Voice over Internet Protocol (VoIP)

MODULE TITLE: Customer Contact Analysis

This module will give students the opportunity to:

- Understand the importance of an analysts role
- Develop practical methods to ensure key messages are understandable and consistent
- Understand options and best practice in data storage and access
- Create a toolkit of meaningful analysis methods to drive value from analysis
- Understand the key principles of analysis of written or verbal communications
- Develop an understanding of query building
- Learn how to integrate and understand external data sources

KNOWLEDGE AND UNDERSTANDING

- K1 Develop an understanding of data collection and collation into concise, meaningful summaries
- K2 Identify suitable data sources within the organisation and understand the importance of 'single source of truth' for reporting and MI
- K3 Interpret data and provide meaningful summary analysis with relevant action points for business improvement

INTELLECTUAL QUALITIES

- I2 Use appropriate analytical processes and methodology to interrogate data in multiple ways
- I3 Illustrate use of alternate methodologies to support and/or illustrate trends and issues within organisation

PROFESSIONAL/PRACTICAL SKILLS

- P1 Review how to report and communicate information to help others focus on their key issues and goals
- P2 Ability to introduce new analysis methodologies into the analysis team

TRANSFERABLE SKILLS

- T1 Awareness of own analytical skills and potential development areas
- T2 Ability to synthesise meaningful data
- T3 Ability to present complex data in a clear, meaningful way to different internal and external audiences

CONTENT

Role of Analysts in Customer Contact Centres

- Difference in analysts and report generators
- Roles and Responsibilities of Analysts

Management Information (MI)

- What makes good MI?
- KPI's – how many, what is a 'key performance indicator' versus a statistic
- Data storage / data warehousing
- Quality versus Quantity
- Analysis versus Analytics

Analysis Methods

- Standard Deviation
- Identifying causal and historic data trends
- Data interrogation
- 'What-if' scenario building

MODULE TITLE: Advanced Planning Techniques

To enable students to develop an understanding of how customer contact resourcing skills can be adapted and applied to the wider organisation. This will involve gaining an understanding of workload / customer demand, review of applicable legislation in the other areas, development of appropriate resourcing models as well as communication of new staffing models and principles. Students will be encouraged to compare and contrast planning principles in the different areas of the business to understand impact of the ideas generated by the module.

KNOWLEDGE AND UNDERSTANDING

- K1 Identify main customer contact channels within the organisation, their inter relationship, and the impact each is having on business processes
- K2 Review and analyse planning frameworks with respect to own company and identify improvement opportunities
- K3 Identify roles and responsibilities within the operational planning model for the company and where inter dependencies exist
- K4 Identify and understand various technology with respect to planning frameworks and the benefit of each system to organisation

INTELLECTUAL QUALITIES

- I1 Review and contextualise the functionality of planning models and technology systems with respect to data sources and business processes
- I2 Use industry case study and articles to identify potential methodologies for implementing business improvement
- I3 Understand the importance of networking and continuous industry learning in an evolving business environment

PROFESSIONAL/PRACTICAL SKILLS

- P1 Apply industry frameworks to the organisational culture and structure
- P2 Collate relevant data to validate and build planning models
- P3 Critically evaluate success / failure of own initiatives and refine models / plans accordingly

TRANSFERABLE SKILLS

- T1 Present technical concepts to an uninformed audience
- T2 Developing plans for business improvement
- T3 Effective use of various business technology solutions

CONTENT

Customer Contact Channels

- Identifying how customers currently and potentially in the future use different channels to contact organisation
- The future of customer contact, especially the impact of Social Media channels
- Suitability and challenges surrounding channel blending as a means to resolve customer contact instances

Operational Planning Model

- Interdependencies of forecasting, scheduling, real time monitoring and reporting with respect to customer contact
- Effects of scalability on organisations
- Technology challenges surrounding different response methodologies (blended or ring fenced teams)
- Impact of different service level targets by customer contact channel

Planning Frameworks

- Review and analyse standard industry frameworks for customer contact handling and assess how they apply within own environment
- Understand what works best for different organisations and why
- Self assessment of own organisation against framework

Planning Models

- Effectiveness of industry technology for planning for various customer contact channels
- Review of industry standard methodology for calculating staff requirements per channel type
- Building models with Spreadsheets – stages of development, tracking changes, demonstrating results

Presentation Skills

- Presenting technical concepts to non-technical colleagues
- Verbal versus written presentation
- Displaying complicated data succinctly
- Action Planning

Appendix:

Accreditation Impacts

Why Accreditation Matters to Students

Earning a degree is a significant achievement and an important investment in your future. Since so much of your future success depends on your educational foundation, the quality of the education you receive makes a big difference.

Earning a degree from an accredited program:

1. Verifies that the quality of the educational experience you've received meets the standards of the profession.
2. Increases and enhances employment opportunities.

Why Accreditation Matters to Programmes and Institutions

Accreditation provides an opportunity for academic institutions to demonstrate they are committed to maintaining their programs' quality and that their programs are performing at the level required by the professions they serve. Programs undergo periodic reviews to ensure that they continue to meet quality standards set by the profession / industry. The result provides lasting benefits to students, the institution, employers, the professions, and society as a whole.

Why Accreditation Matters to the Customer

Accreditation enables organisations to demonstrate to the public that they are serious about advancing the quality of their people, services and products. It is recognition by the industry bodies that these programs are preparing students well, and it encourages "best practices" in knowledge, processes and understanding through formal, continuous quality improvement processes.

Why Accreditation Matters to Industry

As an employer, you want to know that your new hires have the right educational background to excel. Accreditation provides that assurance.

When Ulster University Business Institute evaluates its programmes, they make certain the program meets quality standards that provide the students with an appropriate educational experience.

Accreditation:

- Ensures that graduates have met the educational requirements necessary to enter the profession
- Provides opportunities for the industry to guide the educational process to reflect current and future needs
- Enhances the mobility of professionals
- In addition, accreditation is often used by licensing, registration, and certification boards to screen applicants. This provides additional assurance that our customers and members are in knowledgeable, professional hands

The Operational Excellence Model and the Five Steps to Success

In the Planning Forum, we say that success doesn't happen by chance. These two models underpin our training programmes and support development of the next generation of customer operations. We wanted to share them with you.

Originally derived from NLP research (neuro-linguistic programming) about what drives successful leaders in all spheres of life, we have adapted these models to support success in customer operations.

The Operational Excellence Model was created in this form to illustrate the value of planning, but it works well, whether you see this narrowly as resource planning or broadly as 'getting prepared'. Truly, if we fail to plan, we plan to fail. In this model, the plan is a tool for communication and focus. We establish a shared goal, agree assumptions, resources constraints, targets etc – so that everything can be aligned and 'locked down'. Then we take action – and learn from this afterwards by analysing the results, so that we can make changes and build them into a new plan for the next period. It's important that the changes are not just changes to the plan; but that we actually change what we do – and then reflect our new working practices in the plan.

The Five Steps apply excellence models used by elite athletes; they are about creating an environment for peak performance. Planning and preparation are the focus – occupying the first four positions – but the review stage is still vital. This is also a 'closed loop' learning cycle.

1. Establish a shared goal

Firstly, like any successful athlete or performer, we need to be clear what we are trying to achieve. What does success look, sound and feel like? This clarity of goal is critical; success is difficult to achieve without it. But it is not enough just to set a goal. Top performers live their dreams every day; in a team or teams we need to make sure that this dream is fully shared and that everyone is emotionally engaged.

2. Plan the steps

Next we need to plan the steps required to achieve the desired objective and develop the skills of those involved, to create a team that delivers more than the sum of its individual parts. Again, this needs to be communicated effectively to all concerned.

3. Practice and train together

We sometimes think of training as delivering courses – whether in a class room or online – but if we want to develop emotional intelligence, we need coaching like professionals. We need to train like an elite sports team, where you intuitively know your individual roles and how these work together. This means that 'in the moment' we instinctively respond as a team in pursuit of our shared goal.

4. Provide great support

Think of sporting success. Winning an Olympic gold medal or the Tour de France is a team effort – athletes and the support team. Even individual events rely heavily on the support around them. In the same way, for us, it is sometimes tempting to put all the focus, training and resource in the frontline of customer operations. Winners, however, are provided the necessary support. Think broadly here in terms of specialist knowledge, external support and a safe environment to deliver change and innovation without fear of repercussions.

5. Review and respond

Regular review of progress against the goal will require you to amend the plan, the resources required or even the goal itself. Success will rarely be plain sailing and what makes the best teams stand out is that they have the ability to respond flexibly to challenges and learn from 'failure'. They also retain the confidence to go on.

(Article first published in the 2013 Best Practice Guide)



The Professional Planning Forum

An independent industry body established in 2000, we promote best practice and effective planning in customer contact operations - working in all sectors to provide strategic advice and best practice support for managers and to offer specialist training and accreditation for planning and analysis.

Facilitating nine communities of best practice, which can be accessed from the buttons to the left of this webpage, our aims are to:-

- Establish professionalism in planning and analysis across all customer contact operations.
- Promote best practice benchmarking as a planning methodology that every manager needs to embrace.
- Offer year-round advice and support for our members.
- Provide specialist training, qualifications, standards and accreditation.
- Work with industry leaders to champion the needs of our members and encourage innovation.

We have uploaded a wealth of new best practice material from our Customer Strategy and Planning conference and awards and research programmes. Please use these to drive improvements in your operation, join as a member to access our full library and our free member events and take advantage of our wide range of services.

If you have any questions you can email info@planningforum.co.uk or call 0333 1235960. Or contact any of the team, you can find contact details here.

The Ulster Business School

- The leading provider, for over forty years, of university accredited management education and training programmes in Northern Ireland.
- 85% of staff submitted to the 2008 RAE are “internationally” recognised in terms of the “originality, significance and rigour” of their work.
- 35% of RAE submission is, at minimum, “internationally excellent”.
- Rated 'excellent' in teaching and learning on an objective and externally assessed basis.
- Engaged with businesses through student work placement, teaching, research, Knowledge Transfer Partnerships (KTPs) and Fusion projects.
- A Business School in partnership with many of the professional bodies in management education.
- A member of the UK's Association of Business Schools (ABS) and of the European Foundation for Management Development (EFMD).
- A faculty of the University, providing a comprehensive range of undergraduate, postgraduate and post-experience courses, on a full-time and part-time basis.

University of Ulster
Shore Road
Newtownabbey
Co. Antrim
BT37 0QB
Tel: 028 7012 3456