



ON-THE-JOB TRAINING BLUEPRINT

INDUSTRY

CALL CENTRE

JOB TITLE

IT OFFICER

MODULE

**MANAGING INFORMATION AND
INFORMATION SYSTEMS**

Developed in collaboration with Customer Service Transformation Pte Ltd
This blueprint provides training for the National Skills Certificate Level 1 in
Managing Information and Information Systems

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ON-THE-JOB TRAINING TASK ANALYSIS

JOB TITLE CUSTOMER SERVICE OFFICER		UNIT	DEPARTMENT	DIVISION CUSTOMER SERVICE	TOTAL TASKS 3	TASK NUMBER 1.1	
SN	Main Task	Task Elements	Key Points	Task Standards	Skills & Knowledge	Training Guidelines	OJT Hours
1	CONTRIBUTE TO IDENTIFICATION AND DIMENSIONING OF CUSTOMER NEEDS						8
1.1	Handle customer enquiries	<ol style="list-style-type: none"> 1. Obtain customer details <ul style="list-style-type: none"> • Name • Identification number if any 2. Retrieve customer record from system 3. Listen to customer's enquiries 4. Ask questions to identify customer needs <ul style="list-style-type: none"> • General enquiries • Request for action • Complaints • Feedback 5. Identify whether needs can be met 	<ul style="list-style-type: none"> • Use organisation's standard phrases • Listen and remember customer name • Listen attentively, without interrupting • Paraphrase and probe to understand enquiries where applicable 	<ul style="list-style-type: none"> • Customer needs are identified and handled according to company policy • Proactive in sharing customer problems and contributing solutions 	<p>Knowledge</p> <ul style="list-style-type: none"> • Company policies, procedures, guidelines, cultures and values, mission, business goals and standards • Products and services provided • Customer base • Types of customer needs • Referral procedures related to customer service <p>Skills</p> <ul style="list-style-type: none"> • Identifying customer needs • Assessing impact of problems • Ranking critical level of problems • Contributing to problem resolution 	<p>OJT Explain & Demonstrate</p> <ul style="list-style-type: none"> • Procedure for handling customer enquiries • Importance of sharing customer problems with team members <p>Skills Practice</p> <ul style="list-style-type: none"> • Trainee to buddy with another CSO to handle customer enquiries 	
	a) Needs cannot be met	<ol style="list-style-type: none"> 1. Inform customer problem relates to another party/ department 2. Assist to transfer call to correct department or provide relevant contact number to customer 					

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SN	Main Task	Task Elements	Key Points	Task Standards	Skills & Knowledge	Training Guidelines	OJT Hours
	b) Needs can be met	<ol style="list-style-type: none"> 1. Identify and assess impact of problem 2. Inform customer of action plan 3. Rank impact of problem <ul style="list-style-type: none"> • Highly critical <ul style="list-style-type: none"> - Log in details and nature of problem into system - Escalate problem (via system) to relevant party to take action - Call and inform relevant party of urgency - Follow up with customer within dateline to close case • Not highly critical <ul style="list-style-type: none"> - Log in details and nature of problem into system - Escalate problem (via system) to relevant party to take action - Follow up with customer within dateline to close case 	<ul style="list-style-type: none"> • State time frame to revert on status if necessary • Keep customer informed if problem cannot be resolved within agreed time frame • Keep customer informed if problem cannot be resolved within agreed time frame 				

ON-THE-JOB TRAINING TASK ANALYSIS

JOB TITLE CUSTOMER SERVICE OFFICER		UNIT	DEPARTMENT	DIVISION CUSTOMER SERVICE	TOTAL TASKS 3	TASK NUMBER 1.2	
SN	Main Task	Task Elements	Key Points	Task Standards	Skills & Knowledge	Training Guidelines	OJT Hours
1.2	Discuss problems in meeting customer needs	<ol style="list-style-type: none"> 1. Share customer problems with team leader and team members <ul style="list-style-type: none"> • Request for action • Complaints • Feedback • Inconsistencies between company policy and customer needs 2. Brainstorm and share effective solutions to handle similar problem 3. Agree on solution and response to be consistently applied for similar problem 4. Document and disseminate problem and solution 	<ul style="list-style-type: none"> • Disseminate to all team members and stake holders • For issues arising from inconsistency between company policy and customer needs, highlight and bring to higher authority's attention for comments and action 				

ON-THE-JOB TRAINING TASK ANALYSIS

JOB TITLE CUSTOMER SERVICE OFFICER		UNIT	DEPARTMENT	DIVISION CUSTOMER SERVICE	TOTAL TASKS 3	TASK NUMBER 2	
SN	Main Task	Task Elements	Key Points	Task Standards	Skills & Knowledge	Training Guidelines	OJT Hours
2	OBTAIN FEEDBACK FROM CUSTOMERS	<ol style="list-style-type: none"> 1. Encourage customer feedback during conversation 2. Filter for constructive feedback 3. Log feedback into system 4. Escalate feedback to team leader for collation 5. Share feedback with team members during meeting 		Customer feedback is promptly and accurately recorded in system	<p>Knowledge</p> <ul style="list-style-type: none"> • Company policies, procedures, guidelines, cultures and values, mission, business goals and standards • Customer base • Customer feedback <p>Skills</p> <ul style="list-style-type: none"> • Obtaining customer feedback 	<p>OJT Explain & Demonstrate</p> <ul style="list-style-type: none"> • Method of obtaining customer feedback • Importance of sharing customer feedback with team members <p>Skills Practice</p> <ul style="list-style-type: none"> • Trainee to buddy with another CSO to obtain customer feedback • Trainee to participate in feedback sharing session 	8

ON-THE-JOB TRAINING TASK ANALYSIS

JOB TITLE CUSTOMER SERVICE OFFICER		UNIT	DEPARTMENT	DIVISION CUSTOMER SERVICE	TOTAL TASKS 3	TASK NUMBER 3	
SN	Main Task	Task Elements	Key Points	Task Standards	Skills & Knowledge	Training Guidelines	OJT Hours
3	CONTRIBUTE TO ASSESSMENT AND ENHANCEMENT OF CUSTOMER SATISFACTION AND RELATIONSHIPS	<ol style="list-style-type: none"> 1. Contact customer to find out whether needs are satisfied 2. Log feedback into system 3. Analyse feedback against customer satisfaction score 4. Compute score, such as <ul style="list-style-type: none"> • Good • Very good • Needs improvement • No comment 5. Escalate feedback to team leader 6. Share feedback with team members during meetings 	<ul style="list-style-type: none"> • 100% contact or random contact • Ask leading questions if applicable 	Proactive in analysing feedback and escalating to team leader for action	<p>Knowledge</p> <ul style="list-style-type: none"> • Company policies, procedures, guidelines, cultures and values, mission, business goals and standards • Company quality and continuous improvement process • Customer feedback <p>Skills</p> <ul style="list-style-type: none"> • Analysing customer feedback 	<p>OJT Explain & Demonstrate</p> <ul style="list-style-type: none"> • Procedure to analyse customer feedback • Importance of customer feedback • Measures taken to improve customer service and relationships <p>Skills Practice</p> <ul style="list-style-type: none"> • Trainee to buddy with another CSO to obtain customer feedback • Trainee to participate in feedback sharing session 	8

ON-THE-JOB TRAINING SCHEDULE

JOB TITLE Customer Service Officer					TRAINING PERIOD		From					
							To					
TOTAL TASKS 3			DEPARTMENT		INSTRUCTOR'S NAME				TELEPHONE			
UNIT			DIVISION Customer Service		INSTRUCTOR'S JOB TITLE				NUMBER OF TRAINEES			
TASKS			1 Contribute to identification & dimensioning of customer needs	2 Obtain feedback from customers	3 Contribute to assessment & enhancement of customer satisfaction					TOTAL TRAINING HOURS	OVERALL ASSESSMENT	
											SN	TRAINEE'S NAME
		DATE								24		
		TIME										
		DURATION (Hr)	8	8	8							
		PR*										
		DATE								24		
		TIME										
		DURATION (Hr)	8	8	8							
		PR*										
		DATE								24		
		TIME										
		DURATION (Hr)	8	8	8							
		PR*										
PREPARED BY					APPROVED BY							
DESIGNATION			SIGNATURE		DESIGNATION				SIGNATURE			
TELEPHONE			DATE		TELEPHONE				DATE			

*Performance rating (PR): A - Very good B - Good C - Satisfactory D - Inadequate

ON-THE-JOB TRAINING LOG BOOK

TRAINEE'S NAME			DIVISION Customer Service					
JOB TITLE Customer Service Officer			INSTRUCTOR'S NAME					
UNIT			INSTRUCTOR'S JOB TITLE					
DEPARTMENT			TELEPHONE					
SN	Main Tasks	Training Date	Training Time		Total Hours	PR*	Signature	
			From	To			Trainee	Instructor
1	Contribute to identification and dimensioning of customer needs				8			
2	Obtain feedback from customers				8			
3	Contribute to assessment and enhancement of customer satisfaction				8			
PREPARED BY			APPROVED BY			OVERALL	HOURS 24	
DESIGNATION		SIGNATURE	DESIGNATION			SIGNATURE		
TELEPHONE		DATE	TELEPHONE			DATE		

*Performance rating (PR): A - Very good B - Good C - Satisfactory D - Inadequate

ON-THE-JOB TRAINING BLUEPRINT

JOB TITLE

SUPERVISOR

MODULE

**MANAGING PERSONAL WORK
PERFORMANCE**

Developed in collaboration with Customer Service Transformation Pte Ltd

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ON-THE-JOB TRAINING CURRICULUM

JOB TITLE Supervisor		UNIT -	
DEPARTMENT Customer Service		DIVISION -	
TRAINING MODULE Managing Personal Work Performance		TOTAL TASKS 3	TOTAL OJT HOURS 39
SN	MAIN TASKS	OJT HOURS	
1	MANAGE SELF	28	
2	SET AND MEET OWN WORK PRIORITIES 2.1 Prioritise competing demands to achieve goals 2.2 Use technology to manage work	7	
3	DEVELOP AND MAINTAIN PROFESSIONAL COMPETENCY 3.1 Develop personal competencies 3.2 Participate in professional network	4	
PREPARED BY		APPROVED BY	
DESIGNATION	SIGNATURE	DESIGNATION	SIGNATURE
TELEPHONE	DATE	TELEPHONE	DATE

ON-THE-JOB TRAINING TASK ANALYSIS

JOB TITLE SUPERVISOR		UNIT	DEPARTMENT CUSTOMER SERVICE	DIVISION	TOTAL TASKS 3	TASK NUMBER 1	
SN	Main Task	Task Elements	Key Points	Task Standards	Skills & Knowledge	Training Guidelines	OJT Hours
1	MANAGE SELF	<ol style="list-style-type: none"> 1. Study organisational plans <ul style="list-style-type: none"> • Organisational goals • Key performance indicators • Roles and responsibilities 2. Set personal goals 3. Set action plan to achieve goals 4. Maintain consistent work performance <ul style="list-style-type: none"> • Maintain positive attitude • Adapt to changes • Discuss with superior/team members if necessary 	<ul style="list-style-type: none"> • Must be clear of company's objectives and standards • Goals must be specific, measurable, attainable, relevant and have a timeframe • Targets must be set higher than those planned • Vary work conditions and work context 	Manage self within 14 hours	<p>Knowledge</p> <ul style="list-style-type: none"> • Management • Quality and continuous improvement process • Enterprise policies, procedures, guidelines, culture and values, mission, business goals and standards <p>Skills</p> <ul style="list-style-type: none"> • Planning • Setting goals • Solving problems 	<p>OJT Explain and Demonstrate</p> <ul style="list-style-type: none"> • Procedure for managing self <p>Skills Practice</p> <ul style="list-style-type: none"> • Provide trainee 3-5 times practice 	28

ON-THE-JOB TRAINING TASK ANALYSIS

JOB TITLE SUPERVISOR		UNIT	DEPARTMENT CUSTOMER SERVICE	DIVISION	TOTAL TASKS 3	TASK NUMBER 2.1-2.2	
SN	Main Task	Task Elements	Key Points	Task Standards	Skills & Knowledge	Training Guidelines	OJT Hours
2	SET AND MEET OWN WORK PRIORITIES						
2.1	Prioritise competing demands to achieve goals	<ol style="list-style-type: none"> 1. Study demands 2. Prioritise demands based on its urgency and importance <ul style="list-style-type: none"> • Time frame • Customer satisfaction • Service level 3. Deliver demands 	<ul style="list-style-type: none"> • Check list of work to be completed 	Set and meet own work priorities within 15 minutes	Knowledge <ul style="list-style-type: none"> • Operating system and technology • Enterprise policies, procedures, guidelines, culture and values, mission, business goals and standards Skills <ul style="list-style-type: none"> • Prioritising • Organising 	OJT Explain & Demonstrate <ul style="list-style-type: none"> • Procedure for setting and meeting own work priorities Skills Practice <ul style="list-style-type: none"> • Provide trainee 3-5 times practice 	7
2.2	Use technology to manage work	<ol style="list-style-type: none"> 1. Input priorities and commitment based on technology used <ul style="list-style-type: none"> • Scheduler • Organiser 2. Monitor closely priorities and commitment made 3. Make adjustments if necessary 	<ul style="list-style-type: none"> • Work must be completed as scheduled • Relevant parties must be informed of changes made 				

ON-THE-JOB TRAINING TASK ANALYSIS

JOB TITLE SUPERVISOR		UNIT	DEPARTMENT CUSTOMER SERVICE	DIVISION	TOTAL TASKS	TASK NUMBER 3.1-3.2	
SN	Main Task	Task Elements	Key Points	Task Standards	Skills & Knowledge	Training Guidelines	OJT Hours
3	DEVELOP AND MAINTAIN PROFESSIONAL COMPETENCY			Complete and maintain professional competency within 2 hours	Knowledge <ul style="list-style-type: none"> Competency standards for personal work performance Feedback mechanism Learning styles Continuous improvement process Skills <ul style="list-style-type: none"> Serving customer s Assessing own performance and learning from experience and feedback 	OJT Explain & Demonstrate <ul style="list-style-type: none"> Procedure for developing and maintaining professional competency Skills Practice <ul style="list-style-type: none"> Provide trainee 3-5 times practice 	4
3.1	Develop personal competencies	<ol style="list-style-type: none"> Assess personal skills against <ul style="list-style-type: none"> Assigned task Performance appraisal Feedback from clients and colleagues Develop ways to improve competency <ul style="list-style-type: none"> Develop an action plan Set goals to develop competencies Select suitable learning style <ul style="list-style-type: none"> Class room training Self study Computer based training On-the-job coaching 	<ul style="list-style-type: none"> Identify tasks that cannot be handled Seek improvements on area with unsatisfactory performance New skills should be identified to maintain competitive edge Carry out action plan 				
3.2	Participate in professional network	<ol style="list-style-type: none"> Enrol as member at Call Centre Council of Singapore Participate in monthly activities <ul style="list-style-type: none"> Seminars Site visit Befriend people from other Call Centres 	<ul style="list-style-type: none"> Networking will enhance personal knowledge, skills and develop relationship with people within the industry 				

ON-THE-JOB TRAINING CURRICULUM

JOB TITLE Customer Service Officer		UNIT Customer Service	
DEPARTMENT Call Centre		DIVISION	
TRAINING MODULE Processing Complex Account Enquiries		TOTAL TASKS 4	TOTAL OJT HOURS 40
SN	MAIN TASKS	OJT HOURS	
1	IDENTIFY AND CLARIFY CUSTOMER ENQUIRY	8	
2	SATISFY CUSTOMER NEED	8	
3	NEGOTIATE ACCOUNT PAYMENT EXTENSIONS	12	
4	APPROVE WAIVER OF CHARGES WHERE ERRORS ARE EVIDENT	12	
PREPARED BY		APPROVED BY	
DESIGNATION	SIGNATURE	DESIGNATION	SIGNATURE
TELEPHONE	DATE	TELEPHONE	DATE

ON-THE-JOB TRAINING TASK ANALYSIS

JOB TITLE CUSTOMER SERVICE OFFICER		UNIT CUSTOMER SERVICE	DEPARTMENT CALL CENTRE	DIVISION	TOTAL TASKS 4	TASK NUMBER 1	
SN	Main Task	Task Elements	Key Points	Task Standards	Skills & Knowledge	Training Guidelines	OJT Hours
1	IDENTIFY AND CLARIFY CUSTOMER ENQUIRY	<ol style="list-style-type: none"> 1. Greet customer on receiving call and offer assistance 2. Access customer records to verify customer's particulars <ol style="list-style-type: none"> a) Registered name of customer b) NRIC c) Product/Service <ul style="list-style-type: none"> • Mobile number • Line number • Account number 3. Offer assistance to customer 4. Identify customer's needs 5. Clarify with customer for further information 6. Acknowledge their request 		Able to identify and clarify customer enquiry within 3 minutes	<p>Knowledge</p> <ul style="list-style-type: none"> • Types of communication skills <ul style="list-style-type: none"> – Oral – Written – Listening • Types of calls <ul style="list-style-type: none"> – Enquiries – Complaint – Compliment • Products and services • Promotional events • Billing procedures and policies • Information system <p>Skills</p> <ul style="list-style-type: none"> • Handling calls • Using computer 	<p>OJT Explain</p> <ul style="list-style-type: none"> • Various greeting tones • Customer service standards • Handling of nasty customer/call <p>Explain & Demonstrate</p> <ul style="list-style-type: none"> • Identify and clarify customer enquiry <p>Worksheet 1</p> <p>Skills Practice</p> <ul style="list-style-type: none"> • Trainee to practise at least 5 times 	8

ON-THE-JOB TRAINING TASK ANALYSIS

JOB TITLE CUSTOMER SERVICE OFFICER		UNIT CUSTOMER SERVICE	DEPARTMENT CALL CENTRE	DIVISION	TOTAL TASKS 4	TASK NUMBER 2	
SN	Main Task	Task Elements	Key Points	Task Standards	Skills & Knowledge	Training Guidelines	OJT Hours
2	SATISFY CUSTOMER NEED	<ol style="list-style-type: none"> 1. Access customer database to verify/validate status 2. Determine possible options within empowerment limits to resolve enquiry 3. Explain information to customer on query 4. Get agreement from customer on action plan and/ or products/ services required 5. Ask customer if they have any other questions 6. Say "Thank you for calling" before ending call 	<ul style="list-style-type: none"> • Be clear and concise • Repeat if customer sound doubtful 	Able to satisfy customer needs within organisational policies	<p>Knowledge</p> <ul style="list-style-type: none"> • Types of communication skills <ul style="list-style-type: none"> – Oral – Written – Listening • Types of calls <ul style="list-style-type: none"> – Enquiries – Complaint – Compliment • Products and services • Promotional events • Billing procedures and policies • Information system <p>Skills</p> <ul style="list-style-type: none"> • Handling calls • Using computer 	<p>OJT Explain</p> <ul style="list-style-type: none"> • Need to determine possible options as soon as possible • Customer's agreement on action plan and/or products/ services required <p>Explain & Demonstrate</p> <ul style="list-style-type: none"> • Satisfy customer needs <p>Skills Practice</p> <ul style="list-style-type: none"> • Trainee to practise at least 5 times 	8

ON-THE-JOB TRAINING TASK ANALYSIS

JOB TITLE CUSTOMER SERVICE OFFICER		UNIT CUSTOMER SERVICE	DEPARTMENT CALL CENTRE	DIVISION	TOTAL TASKS 4	TASK NUMBER 3	
SN	Main Task	Task Elements	Key Points	Task Standards	Skills & Knowledge	Training Guidelines	OJT Hours
3	NEGOTIATE ACCOUNT PAYMENT EXTENSIONS	<ol style="list-style-type: none"> 1. Verify with customer on payment time extension or instalment payment 2. Check existing policies and procedures on such payment extensions 3. Obtain customer's credit class (credit record and payment history) from system 4. Inform customer on their limits of either <ul style="list-style-type: none"> • Credit limits • Time extension • Number of instalment payments • Quantum payment • Instalment dateline 5. Get agreement on arrangement of extension taken 6. Update into system on credit payment extension taken by customer 7. Follow-up on agreement for payment extension by <ul style="list-style-type: none"> • Written document (letter) • Phone call • SMS • E-mail 		Able to negotiate account payment extensions within billing policies or empowerment limitations	<p>Knowledge</p> <ul style="list-style-type: none"> • Billing procedures and policies • Payment extension policies <ul style="list-style-type: none"> – Credit rating – Payment history • Information system • Products and service charges <p>Skills</p> <ul style="list-style-type: none"> • Interpersonal skills • Problem-solving • Negotiation • Using computer 	<p>OJT Explain</p> <ul style="list-style-type: none"> • Importance of working within empowerment limits or billing policies • Customer credit rating to make decision on extension credit/ payment arrangement <p>Explain & Demonstrate</p> <ul style="list-style-type: none"> • Negotiating account payment extensions <p>Worksheets 2-3</p> <p>Skills Practice</p> <ul style="list-style-type: none"> • Trainee to practise at least 5 times 	12

ON-THE-JOB TRAINING TASK ANALYSIS

JOB TITLE CUSTOMER SERVICE OFFICER		UNIT CUSTOMER SERVICE	DEPARTMENT CALL CENTRE	DIVISION	TOTAL TASKS 4	TASK NUMBER 3	
SN	Main Task	Task Elements	Key Points	Task Standards	Skills & Knowledge	Training Guidelines	OJT Hours
		8. Review payment due reports 9. Refer payment defaulting customer to appropriate department for further action	<ul style="list-style-type: none"> • Highlight customers personally handled on extension payment 				

ON-THE-JOB TRAINING TASK ANALYSIS

JOB TITLE CUSTOMER SERVICE OFFICER		UNIT CUSTOMER SERVICE	DEPARTMENT CALL CENTRE	DIVISION	TOTAL TASKS 4	TASK NUMBER 4	
SN	Main Task	Task Elements	Key Points	Task Standards	Skills & Knowledge	Training Guidelines	OJT Hours
4	APPROVE WAIVER OF CHARGES WHERE ERRORS ARE EVIDENT	<ol style="list-style-type: none"> 1. Verify customer's claim 2. Check on all relevant information 3. Apologise to customer of error in billing 4. Approve to waive charges 5. Give clear and precise explanations of calculation on how bill charges are arrived 6. Note in logger on waiver given to customer 7. Inform appropriate party to carry out works order for revised billing 		Able to approve waiver charges where errors are evident within organisational policies or empowerment limitations	<p>Knowledge</p> <ul style="list-style-type: none"> • Billing procedures and policies • Products and service charges • Information system <p>Skills</p> <ul style="list-style-type: none"> • Checking data • Handling calls • Problem-solving • Communication 	<p>OJT Explain</p> <ul style="list-style-type: none"> • Checking relevant information • Customers made on such enquiries <p>Explain & Demonstrate</p> <ul style="list-style-type: none"> • Approve waiver of charges where errors are evident <p>Skills Practice</p> <ul style="list-style-type: none"> • Trainee to practise at least 4 times 	12