

# Chartered Banker

Leading financial professionalism

## Call Centre Operations

### A. Aim of Subject

To provide an introduction to call centre operations, including understanding customer needs and the requirements of call centre staffing.

### B. Subject Specific Learning Outcomes

#### Outcome 1

Demonstrate knowledge of the development of call centres.

#### Knowledge, Understanding and Skills

- The Evolution of the Call Centre
- Standardised Customer Service
- The Impact of Call Centres on the Organisation
- Developments in Delivery Channels
- Telephone Banking

#### Outcome 2

Demonstrate an understanding of the types of customers of call centres.

#### Knowledge, Understanding and Skills

- Call Centre Customers
- Market Segmentation
- Socio Economic Groupings
- Acorn Analysis
- Life Cycle
- Barriers to Using a Call Centre
- Security
- Perceptions of Accuracy and Trust
- Offshoring
- Customers with Special Needs
- The Changing Profile of Call Centre Customers
- Call Centre Customers Expectations
- Customer Loyalty
- Types of Customer

#### Outcome 3

Describe the main factors involved in meeting customer's needs.

#### Knowledge, Understanding and Skills

- Pre-sales Preparation
- Sales Techniques
- Product Knowledge
- Treating Customers Fairly
- Call Centre products and services
- Service Recovery and Complaint Handling
- The Financial Services Authority (FSA)
- The Financial Ombudsman Service

#### **Outcome 4**

Describe the main factors involved in staffing call centres.

##### **Knowledge, Understanding and Skills**

- Staffing Requirements
- Service Levels
- Recruitment and Selection
- Training Programmes
- Communication
- Product Knowledge
- Coaching
- Customer Services Skills
- Telephone Communication Skills
- Call Centre Culture
- Treating Customers Fairly

#### **Outcome 5**

Demonstrate an understanding of developments in technology and telephony.

##### **Knowledge, Understanding and Skills**

- Technology
- Change management
- Telephony
- Delivering and managing calls
- What an ACD Does
- Manage the Queue of Calls
- Call placing
- Messaging Systems
- Integrated Voice Response (IVR)
- Mobile Phone Technology
- VoIP - Voice over IP

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