What are Occupational Standards(OS)?

➤ OS describe what individuals need to do, know and understand in order to carry out a particular job role or function

➤ OS are performance standards that individuals must achieve when carrying out functions in the workplace, together with specifications of the underpinning knowledge and understanding

Contents

Introduction

Qualifications Pack- CRM Domestic Non-Voice

SECTOR: IT-ITES

SUB-SECTOR: Business Process Management

OCCUPATION: Customer Relationship Management

REFERENCE ID: SSC/Q2211

Domestic Non- Voice in the IT-ITeS Industry is also known as a Customer Service Associate, Customer Service Representative, Customer Care Executive, Customer Service Advisor, Helpdesk Coordinator, Customer Support Representative, Support Engineer, Support Consultant, Process Associate-Transaction etc.

Brief Job Description: Individuals at this job are responsible for resolving queries and customer cases over web-chat or email. They form the primary layer of contact with the customer and responses may be made on either preexisting email templates or customized mails to the query requirement.

Personal Attributes: This job requires the individual to either work independently or collaboratively in teams to resolve customer queries effectively. The individual should possess excellent communication skills and should be willing to take up a desk-based job with long hours.

Job Details

Qualifications Pack Code	SSC/Q2211		
Job Role	Domestic Non- Voice		
Credits(NVEQF/NVQF/NSQF)	TBD	Version number	1.0
Sector	IT-ITeS	Drafted on	30/04/13
Sub-sector	Business Process Management	Last reviewed on	30/04/13
Occupation	Customer Relationship Management	Next review date	30/06/14

Job Role	CRM Domestic Non-Voice (Customer Service Associate, Customer Service Representative, Customer Care Executive, Process Associate- Transaction)
Role Description	Individuals at this job are responsible for resolving queries and customer cases over web-chat or email.
NVEQF/NVQF level Minimum Educational Qualifications Maximum Educational Qualifications	4 10th Master's Degree in any discipline
Training (Suggested but not mandatory)	Training programs in customer orientation, dealing with difficult customers, written communication etc.
Experience	0-1 years of work experience/internship in customer service roles
Applicable National Occupational Standards (NOS)	**Compulsory:** 1. SSC/N3021 (Deal remotely with customer queries) 2. SSC/N9001 (Manage your work to meet requirements) 3. SSC/N9003 (Maintain a healthy, safe and secure working environment) **Optional:** Not Applicable
Performance Criteria	As described in the relevant OS units

Glossary of Key Terms
Table 1: Glossary of Key Terms

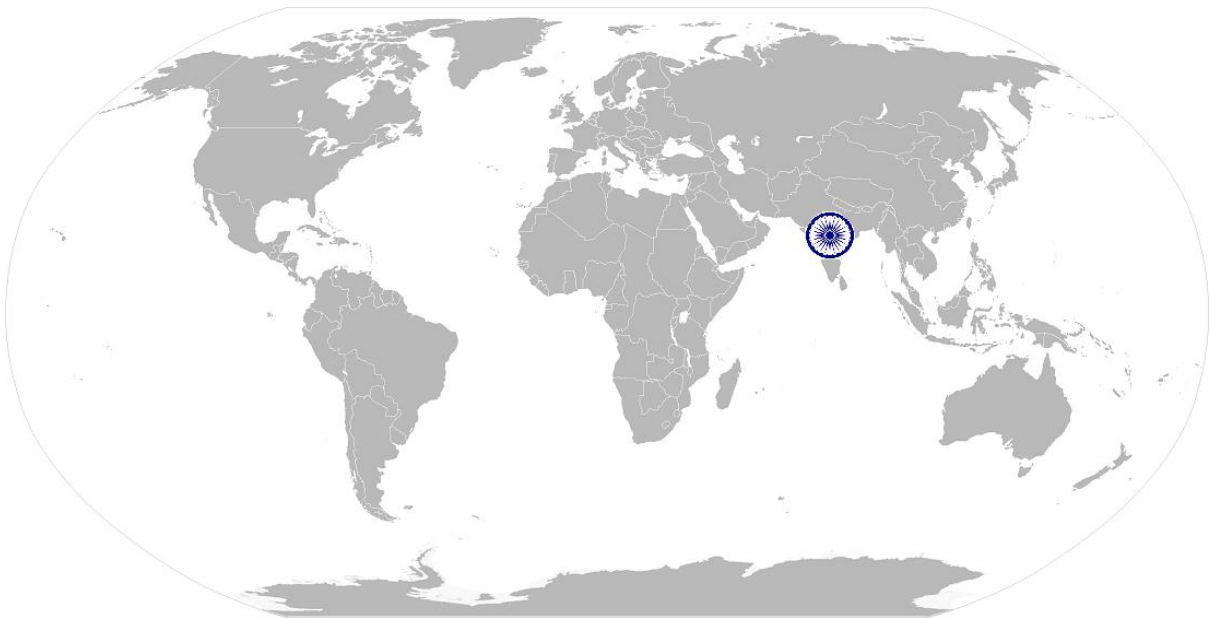|	Keywords /Terms	Description
Definitions	Sector	Sector is a conglomeration of different business operations having similar businesses and interests. It may also be defined as a distinct subset of the economy whose components share similar characteristics and interests.
	Sub-sector	Sub-sector is derived from a further breakdown based on the characteristics and interests of its components.
	Vertical	Vertical may exist within a sub-sector representing different domain areas or the client industries served by the industry.
	Occupation	Occupation is a set of job roles, which perform similar/related set of functions in an industry.
	Function	Function is an activity necessary for achieving the key purpose of the sector, occupation, or area of work, which can be carried out by a person or a group of persons. Functions are identified through functional analysis and form the basis of OS.
	Sub-functions	Sub-functions are sub-activities essential to fulfill the achieving the objectives of the function.
	Job role	Job role defines a unique set of functions that together form a unique employment opportunity in an organisation.
	Occupational Standards (OS)	OS specify the standards of performance an individual must achieve when carrying out a function in the workplace, together with the knowledge and understanding they need to meet that standard consistently. Occupational Standards are applicable both in the Indian and global contexts.
	Performance Criteria	Performance Criteria are statements that together specify the standard of performance required when carrying out a task.
	National Occupational Standards (NOS)	NOS are Occupational Standards which apply uniquely in the Indian context.
	Qualifications Pack Code	Qualifications Pack Code is a unique reference code that identifies a qualifications pack.
	Qualifications Pack(QP)	Qualifications Pack comprises the set of OS, together with the educational, training and other criteria required to perform a job role. A Qualifications Pack is assigned a unique qualification pack code.
	Unit Code	Unit Code is a unique identifier for an OS unit, which can be denoted with either an '**O**' or an '**N**'.
	Unit Title	Unit Title gives a clear overall statement about what the incumbent should be able to do.
	Description	Description gives a short summary of the unit content. This would be

		helpful to anyone searching on a database to verify that this is the appropriate OS they are looking for.
	Scope	Scope is the set of statements specifying the range of variables that an individual may have to deal with in carrying out the function which have a critical impact on the quality of performance required.
	Knowledge and Understanding	Knowledge and Understanding are statements which together specify the technical, generic, professional and organisational specific knowledge that an individual needs in order to perform to the required standard.
	Organisational Context	Organisational Context includes the way the organisation is structured and how it operates, including the extent of operative knowledge managers have of their relevant areas of responsibility.
	Technical Knowledge	Technical Knowledge is the specific knowledge needed to accomplish specific designated responsibilities.
	Core Skills/Generic Skills	Core Skills or Generic Skills are a group of skills that are key to learning and working in today's world. These skills are typically needed in any work environment. In the context of the OS, these include communication related skills that are applicable to most job roles.
	Helpdesk	Helpdesk is an entity to which the customers will report their IT problems. IT Service Helpdesk Attendant is responsible for managing the helpdesk.

	Keywords /Terms	Description
Acronyms	IT-ITeS	Information Technology - Information Technology enabled Services
	BPM	Business Process Management
	BPO	Business Process Outsourcing
	KPO	Knowledge Process Outsourcing
	LPO	Legal Process Outsourcing
	IPO	Information Process Outsourcing
	BCA	Bachelor of Computer Applications
	B.Sc.	Bachelor of Science
	OS	Occupational Standard(s)
	NOS	National Occupational Standard(s)
	QP	Qualifications Pack
	UGC	University Grants Commission
	MHRD	Ministry of Human Resource Development
	MoLE	Ministry of Labor and Employment
	NVEQF	National Vocational Education Qualifications Framework
	NVQF	National Vocational Qualifications Framework

SSC/ N 3021   **Deal remotely with customer queries**

National Occupational Standard

Overview

This unit is about dealing with queries received from customers by e-mail or chat.

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SSC/N3021   **Deal remotely with customer queries**

Applicable NOS Unit		
	Unit Code	**SSC/N3021**
	Unit Title (Task)	**Deal remotely with customer queries**
	Description	This unit is about dealing with queries received from customers by e-mail or chat.
	Scope	This unit/task covers the following: **Customers**: • internal • external **Queries** received by: • e-mail • chat **Appropriate people**: • supervisor • other members of your team • subject matter experts

Performance Criteria (PC) w.r.t. the Scope	
	To be competent, you must be able to:
	PC1. greet customers and verify their details, following your organization's procedures
	PC2. read carefully, summarize, and obtain **customer** confirmation of, your understanding of queries
	PC3. express your concern for any difficulties caused and your commitment to resolving queries
	PC4. record and categorize queries accurately using your organization's query management tool
	PC5. refer queries outside your area of competence or authority promptly to **appropriate people**
	PC6. access your organization's knowledge base for solutions to queries, where available
	PC7. resolve queries within your area of competence or authority in line with organizational guidelines and service level agreements (SLAs)
	PC8. obtain advice and guidance from **appropriate people**, where necessary
	PC9. obtain confirmation from **customers** that queries have been resolved to their satisfaction
	PC10. record the resolution of queries accurately using your organization's query management tool
	PC11. comply with relevant standards, policies, procedures and guidelines when dealing remotely with **customer** queries

Knowledge and Understanding (K)	
A. Organizational Context (Knowledge of the	You need to know and understand: KA1. your organization's standards, policies, procedures, guidelines and service level agreements for dealing with customer queries and your role and

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SSC/N3021	Deal remotely with customer queries
company/ organization and its processes)	responsibilities in relation to these KA2. your organization's management tools and systems for recording, categorizing and resolving customer queries KA3. your organization's customer relationship management (CRM) tools and systems and how to use these KA4. the importance of documenting, classifying and prioritizing customer queries KA5. your organization's knowledge base and how to use this to identify solutions KA6. where to refer queries outside your authority KA7. who to seek advice and guidance from KA8. the importance resolving customer queries KA9. standard tools, templates and scripts available for dealing with customer queries KA10. limits of your role and responsibilities in relation to customer queries KA11. the importance of keeping customers informed about timescales for progress and resolution of customer queries KA12. typical response times for customer queries and the importance of these
B. Technical Knowledge	You need to know and understand: KB1. relevant standards, policies, procedures and guidelines that apply when dealing with customer queries KB2. relevant product reference guides or support materials to resolve queries KB3. common types of customer queries and how to resolve them KB4. different styles and approaches when working with customers KB5. techniques for conveying concern and commitment KB6. different questioning techniques for understanding customer queries KB7. issues that may affect customer satisfaction and how to deal with these KB8. current practice in customer service
Skills (S)	
A. Core Skills/ Generic Skills	**Writing Skills** You need to know and understand how to: SA1. communicate with others in writing SA2. complete accurate well written work with attention to detail **Reading Skills** You need to know and understand how to: SA3. read instructions, guidelines, procedures, rules and service level agreements **Oral Communication (Listening and Speaking skills)** You need to know and understand how to: SA4. listen effectively and orally communicate information accurately SA5. ask for clarification and advice from others
B. Professional Skills	**Decision Making**

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SSC/N3021   **Deal remotely with customer queries**
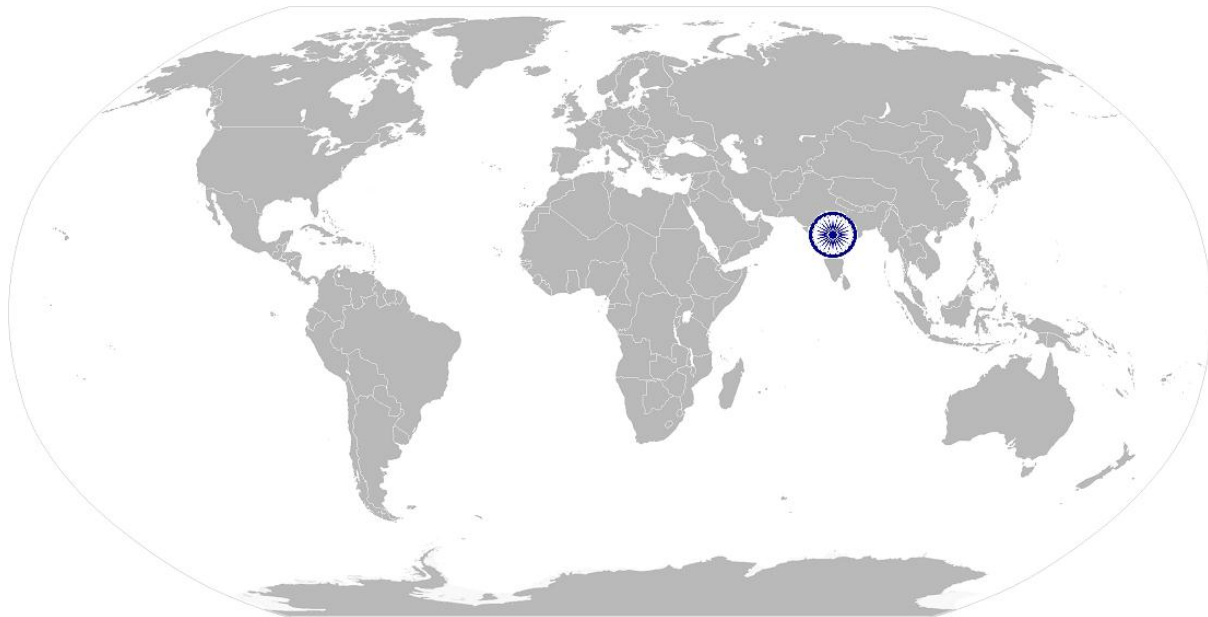
	You need to know and understand how to:
	SB1. make decisions on suitable courses of action
	SB2. follow rule-based decision-making processes
	Plan and Organize
	You need to know and understand how to:
	SB3. plan and organize your work to achieve targets and deadlines
	Customer Centricity
	You need to know and understand how to:
	SB4. build and maintain positive and effective relationships with customers
	SB5. work effectively in a customer facing environment
	SB6. deliver consistent and reliable service to customers
	SB7. check your own work meets customer requirements
	SB8. carry out rule-based transactions in line with customer-specific guidelines, procedures, rules and service level agreements
	Problem Solving
	You need to know and understand how to:
	SB9. apply problem-solving approaches in different situations
	SB10. seek clarification on problems from others
	Analytical Thinking
	You need to know and understand how to:
	SB11. pass on relevant information to others
	SB12. analyze data and activities
	Critical Thinking
	You need to know and understand how to:
	SB13. apply balanced judgments to different situations
	Attention to Detail
	You need to know and understand how to:
	SB14. check your work is complete and free from errors
	Team Working
	You need to know and understand how to:
	SB15. work effectively in a team environment
	SB16. work independently and collaboratively
C. Technical Skills	You need to know and understand how to:
	SC1. use information technology effectively to input and/or extract data accurately
	SC2. store and retrieve information
	SC3. identify and refer anomalies in data
	SC4. keep up to date with changes, procedures and practices in your role

NOS Version control

NOS Code	SSC/N3021		
Credits(NVEQF/NVQF/NSQF) [*OPTIONAL*]	TBD	Version number	1.0
Industry	IT-ITeS	Drafted on	30/04/2013
Industry Sub-sector	Business Process Management	Last reviewed on	30/04/2013
		Next review date	30/06/2014

National Occupational Standard

<u>**Overview**</u>

This unit is about planning and organizing your work in order to complete it to the required standards on time

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SSC/N9001   **Manage your work to meet requirements**

Unit Code	**SSC/N9001**
Unit Title (Task)	**Manage your work to meet requirements**
Description	This unit is about planning and organizing your work in order to complete it to the required standards on time.
Scope	This unit/task covers the following: **Work requirements**: • activities (what you are required to do) • deliverables (the outputs of your work) • quantity (the volume of work you are expected to complete) • standards (what is acceptable performance, including compliance with Service Level Agreements) • timing (when your work needs to be completed) **Appropriate people**: • line manager • the person requesting the work • members of the team/department • members from other teams/departments **Resources**: • equipment • materials • information

Applicable NOS Unit (sidebar)

Performance Criteria (PC) w.r.t. the Scope	
	To be competent on the job, you must be able to: PC1. establish and agree your **work requirements** with **appropriate people** PC2. keep your immediate work area clean and tidy PC3. utilize your time effectively PC4. use **resources** correctly and efficiently PC5. treat confidential information correctly PC6. work in line with your organization's policies and procedures PC7. work within the limits of your job role PC8. obtain guidance from **appropriate people**, where necessary PC9. ensure your work meets the agreed **requirements**

Knowledge and Understanding (K)	
A. Organizational Context (Knowledge of the company/ organization and its processes)	You need to know and understand: KA1. the organization's policies, procedures and priorities for your area of work and your role and responsibilities in carrying out your work KA2. the limits of your responsibilities and when to involve others KA3. your specific work requirements and who these must be agreed with KA4. the importance of having a tidy work area and how to do this KA5. how to prioritize your workload according to urgency and

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SSC/N9001   **Manage your work to meet requirements**

	importance and the benefits of this
	KA6. the organization's policies and procedures for dealing with confidential information and the importance of complying with these
	KA7. the purpose of keeping others updated with the progress of your work
	KA8. who to obtain guidance from and the typical circumstances when this may be required
	KA9. the purpose and value of being flexible and adapting work plans to reflect change
B. Technical Knowledge	You need to know and understand:
	KB1. the importance of completing work accurately and how to do this
	KB2. appropriate timescales for completing your work and the implications of not meeting these for you and the organization
	KB3. resources needed for your work and how to obtain and use these

Skills (S)	
A. Core Skills/ Generic Skills	**Writing Skills**
	You need to know and understand how to:
	SA1. complete accurate work with attention to detail
	Reading Skills
	You need to know and understand how to:
	SA2. read instructions, guidelines/procedures
	Oral Communication (Listening and Speaking skills)
	You need to know and understand how to:
	SA3. ask for clarification and advice from line managers
	SA4. communicate orally with colleagues
B. Professional Skills	**Decision Making**
	You need to know and understand how to:
	SB1. make a decision on a suitable course of action
	Plan and Organize
	You need to know and understand how to:
	SB2. plan and organize your work to achieve targets and deadlines
	SB3. agree objectives and work requirements
	Customer Centricity
	You need to know and understand how to:
	SB4. deliver consistent and reliable service to customers
	SB5. check your own work meets customer requirements
	Problem Solving
	You need to know and understand how to:
	SB6. refer anomalies to the line manager
	Analytical Thinking
	You need to know and understand how to:
	SB7. Provide relevant information to others
	Critical Thinking

SSC/N9001   **Manage your work to meet requirements**

	You need to know and understand how to: SB8. apply judgements to different situations
	Attention to Detail
	You need to know and understand how to: SB9. apply good attention to detail SB10. check your work is complete and free from errors SB11. get your work checked by peers
	Team Working
	You need to know and understand how to: SB12. work effectively in a team environment
C. Technical Skills	You need to know and understand how to: SC1. use information technology effectively, to input and/or extract data accurately SC2. identify and refer anomalies in data SC3. store and retrieve information SC4. keep up to date with changes, procedures and practices in your role

NOS Code	SSC/N9001		
Credits(NVEQF/NVQF/NSQF) [*OPTIONAL*]	TBD	Version number	1.0
Industry	IT-ITeS	Drafted on	30/04/2013
Industry Sub-sector	Business Process Management	Last reviewed on	30/04/2013
		Next review date	30/06/2014

National Occupational Standard

<u>**Overview**</u>

This unit is about monitoring the working environment and making sure it meets requirements for health, safety and security.

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SSC/N9003   **Maintain a healthy, safe and secure working environment**

Applicable NOS Unit

Unit Code	SSC/N9003
Unit Title (Task)	Maintain a healthy, safe and secure working environment
Description	This unit is about monitoring the working environment and making sure it meets requirements for health, safety and security.
Scope	This unit/task covers the following: Emergency procedures: - illness - accidents - fires - other reasons to evacuate the premises - breaches of security Resources(needed to achieve the unit objectives): - information - government agencies in the areas of safety, health and security and their norms and services

Performance Criteria (PC) w.r.t. the Scope	
	To be competent, you must be able to: PC1. comply with your organization's current health, safety and security policies and procedures PC2. report any identified breaches in health, safety, and security policies and procedures to the designated person PC3. identify and correct any hazards that you can deal with safely, competently and within the limits of your authority PC4. report any hazards that you are not allowed to deal with to the relevant person in line with organizational procedures and warn other people who may be affected PC5. follow your organization's emergency procedures promptly, calmly, and efficiently PC6. identify and recommend opportunities for improving health, safety, and security to the designated person PC7. complete any health and safety records legibly and accurately

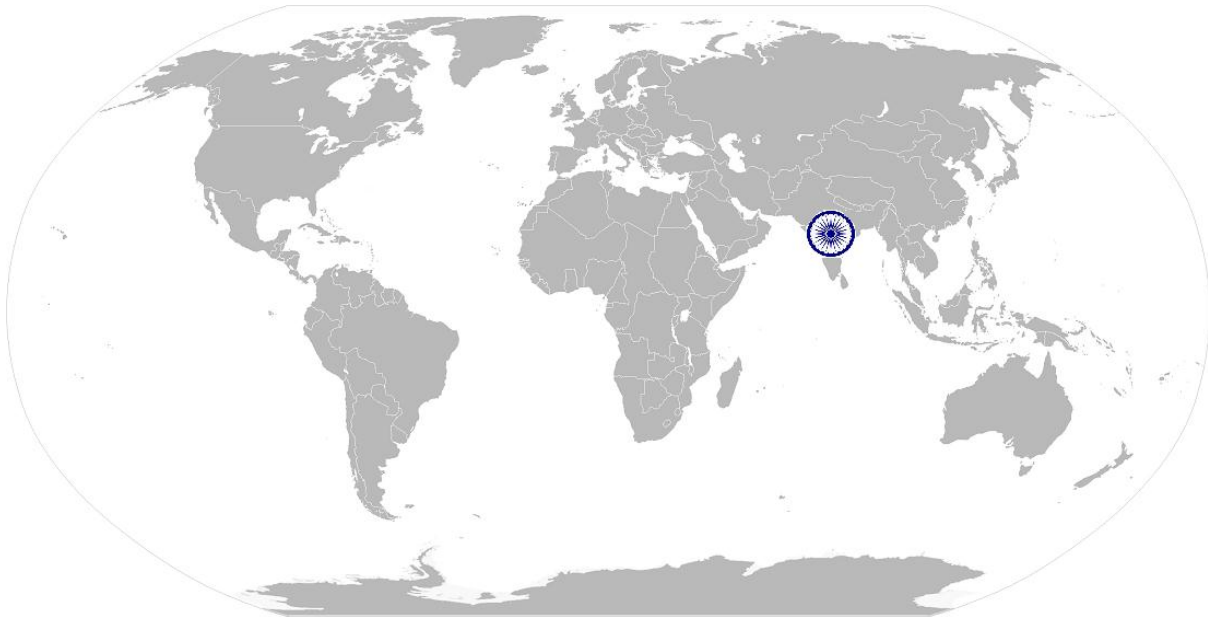| Knowledge and Understanding (K)	
A. Organizational Context (Knowledge of the company/ organization and its processes)	You need to know and understand: KA1. legislative requirements and organization's procedures for health, safety and security and your role and responsibilities in relation to this KA2. what is meant by a hazard, including the different types of health and safety hazards that can be found in the workplace KA3. how and when to report hazards KA4. the limits of your responsibility for dealing with hazards KA5. the organisation's emergency procedures for different emergency situations and the importance of following these KA6. the importance of maintaining high standards of health, safety and security

SSC/N9003   Maintain a healthy, safe and secure working environment

	KA7. implications that any non-compliance with health, safety and security may have on individuals and the organization
B. Technical Knowledge	You need to know and understand: KB1. different types of beaches in health, safety and security and how and when to report these KB2. evacuation procedures for workers and visitors KB3. how to summon medical assistance and the emergency services, where necessary KB4. How to use the health, safety and accident reporting procedures and the importance of these
Skills (S)	
A. Core Skills/ Generic Skills	**Writing Skills**
	You need to know and understand how to: SA1. complete accurate, well written work with attention to detail
	Reading Skills
	You need to know and understand how to: SA2. read instructions, guidelines/procedures/rules
	Oral Communication (Listening and Speaking skills)
	You need to know and understand how to: SA3. listen effectively and orally communicate information accurately
B. Professional Skills	**Decision Making**
	You need to know and understand how to: SB1. make decisions on a suitable course of action or response
	Plan and Organize
	You need to know and understand how to: SB2. plan and organize your work to achieve targets and deadlines
	Customer Centricity
	You need to know and understand how to: SB3. build and maintain positive and effective relationships with colleagues and customers
	Problem Solving
	You need to know and understand how to: SB4. apply problem solving approaches in different situations
	Analytical Thinking
	You need to know and understand how to: SB5. analyse data and activities
	Critical Thinking
	You need to know and understand how to: SB6. apply balanced judgements to different situations
	Attention to Detail
	You need to know and understand how to: SB7. apply good attention to detail SB8. check your work is complete and free from errors SB9. get your work checked by peers

SSC/N9003   **Maintain a healthy, safe and secure working environment**

	Team Working
	You need to know and understand how to: SB10.work effectively in a team environment
C. Technical Skills	You need to know and understand how to: SC1. identify and refer anomalies SC2. help reach agreements with colleagues SC3. keep up to date with changes, procedures and practices in your role

NOS Version Control

NOS Code	SSC/N9003		
Credits(NVEQF/NVQF/NSQF) [*OPTIONAL*]	TBD	Version number	1.0
Industry	IT-ITeS	Drafted on	30/04/2013
Industry Sub-sector	Business Process Management	Last reviewed on	30/04/2013
		Next review date	30/06/2014

SSC	QP Code	Name of the QP	NSQF Level	Equipment Name	Min. no. of Equipment required (per batch of 30 trainees)	Unit Type	mandatory Equipment to be available at the Training Center	Dimension/Specification/Description of the Equipment/ ANY OTHER
IT-ITES	SSC/Q2211	CRM Domestic Non-Voice	4	Internet messenger and Web based Chat tools	30		Yes	
IT-ITES	SSC/Q2211	CRM Domestic Non-Voice	4	Any CRM and ticketing tool	30		Yes	
IT-ITES	SSC/Q2211	CRM Domestic Non-Voice	4	Open Office or MS – Office (word, Excel, PPT, Outlook)	30		Yes	
IT-ITES	SSC/Q2211	CRM Domestic Non-Voice	4	Access to PC, LAN, search engine	30		Yes	
IT-ITES	SSC/Q2211	CRM Domestic Non-Voice	4	Comfortable seats with adequate lighting, controlled temperature and acoustics for training and learning	30		Yes	
IT-ITES	SSC/Q2211	CRM Domestic Non-Voice	4	White Board, Markers and Eraser	1		Yes	
IT-ITES	SSC/Q2211	CRM Domestic Non-Voice	4	Projector with screen	1		Yes	
IT-ITES	SSC/Q2211	CRM Domestic Non-Voice	4	Flip chart with markers	1		Yes	
IT-ITES	SSC/Q2211	CRM Domestic Non-Voice	4	Faculty's PC/Laptop with latest configuration and internet connection	1		Yes	
IT-ITES	SSC/Q2211	CRM Domestic Non-Voice	4	Supporting software / applications for projecting audio, video, recording,	30		Yes	
IT-ITES	SSC/Q2211	CRM Domestic Non-Voice	4	Presentation Tools to support learning activities: Intranet, Email, Ims, Learning management system e.g. Moodle, Blackboard to enable blended learning	30		Yes	

IT-ITES	SSC/Q 2211	CRM Domestic Non-Voice	4	Microphone / voice system for lecture and class activities	30		Yes	
IT-ITES	SSC/Q 2211	CRM Domestic Non-Voice	4	Handy Camera	1		Yes	
IT-ITES	SSC/Q 2211	CRM Domestic Non-Voice	4	Stationery kit – Staples, Glue, Chart Paper, Sketch Pens, Paint Box, Scale, A4 Sheets	30		Yes	
IT-ITES	SSC/Q 2211	CRM Domestic Non-Voice	4	For IT Lab sessions: Computer Lab with 1:1 PC : trainee ratio and having internet connection, MS Office / Open office, Browser, chat tools	30		Yes	
IT-ITES	SSC/Q 2211	CRM Domestic Non-Voice	4	Assessment and Test Tools for day to day online Tests and Assessments	30		Yes	
IT-ITES	SSC/Q 2211	CRM Domestic Non-Voice	4	For team discussions: Adequate seating arrangement in full / half circle format for one or more teams as per planned team composition.	30		Yes	
IT-ITES	SSC/Q 2211	CRM Domestic Non-Voice	4	Reading Resources: Access to relevant sample documents and learning forums to enable self-study before and after each training session.	30		Yes	