

QUALIFICATIONS PACK - OCCUPATIONAL STANDARDS FOR IT-ITeS INDUSTRY

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

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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	4
Minimum Educational Qualifications	10th
Maximum Educational Qualifications	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)	<p>Compulsory:</p> <ol style="list-style-type: none"> SSC/N3021 (Deal remotely with customer queries) SSC/N9001 (Manage your work to meet requirements) SSC/N9003 (Maintain a healthy, safe and secure working environment) <p>Optional: Not Applicable</p>
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

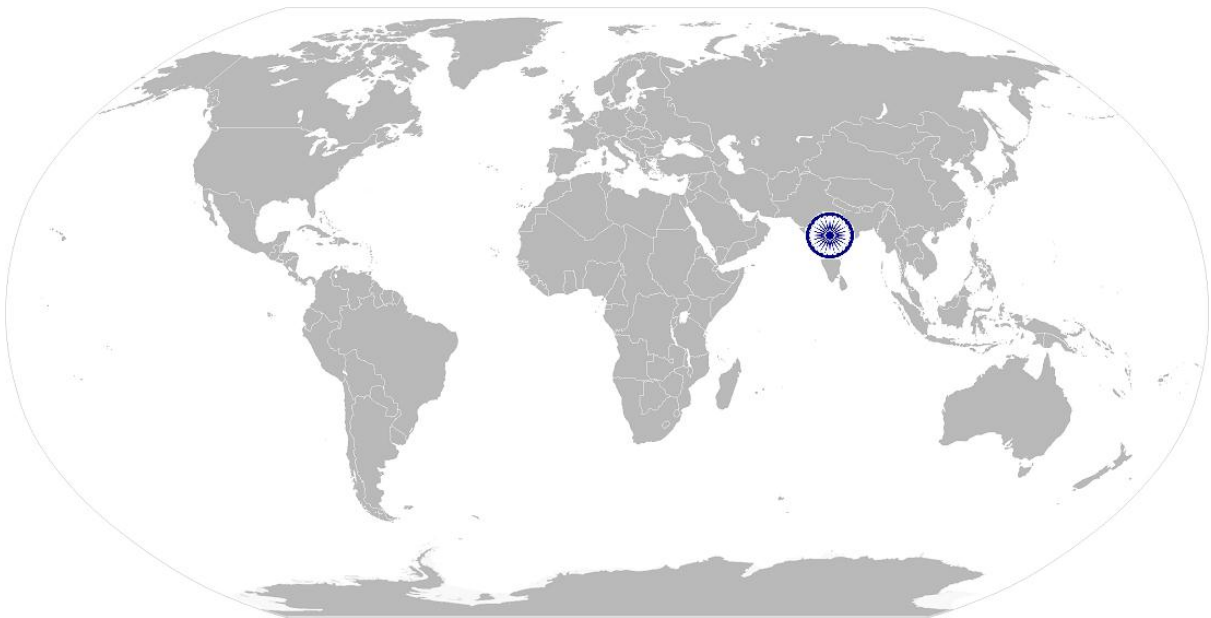
	helpful to anyone searching on a database to verify that this is the appropriate OS they are looking for.
Scope	Scope is the set of statements specifying the range of variables that an individual may have to deal with in carrying out the function which have a critical impact on the quality of performance 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
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

Acronyms

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.

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	<p>This unit/task covers the following:</p> <p>Customers:</p> <ul style="list-style-type: none"> • internal • external <p>Queries received by:</p> <ul style="list-style-type: none"> • e-mail • chat <p>Appropriate people:</p> <ul style="list-style-type: none"> • supervisor • other members of your team • subject matter experts
	Performance Criteria (PC) w.r.t. the Scope	
		<p>To be competent, you must be able to:</p> <p>PC1. greet customers and verify their details, following your organization's procedures</p> <p>PC2. read carefully, summarize, and obtain customer confirmation of, your understanding of queries</p> <p>PC3. express your concern for any difficulties caused and your commitment to resolving queries</p> <p>PC4. record and categorize queries accurately using your organization's query management tool</p> <p>PC5. refer queries outside your area of competence or authority promptly to appropriate people</p> <p>PC6. access your organization's knowledge base for solutions to queries, where available</p> <p>PC7. resolve queries within your area of competence or authority in line with organizational guidelines and service level agreements (SLAs)</p> <p>PC8. obtain advice and guidance from appropriate people, where necessary</p> <p>PC9. obtain confirmation from customers that queries have been resolved to their satisfaction</p> <p>PC10. record the resolution of queries accurately using your organization's query management tool</p> <p>PC11. comply with relevant standards, policies, procedures and guidelines when dealing remotely with customer queries</p>
	Knowledge and Understanding (K)	
	A. Organizational Context (Knowledge of the	<p>You need to know and understand:</p> <p>KA1. your organization's standards, policies, procedures, guidelines and service level agreements for dealing with customer queries and your role and</p>

SSC/N3021

Deal remotely with customer queries

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

SSC/N3021

Deal remotely with customer queries

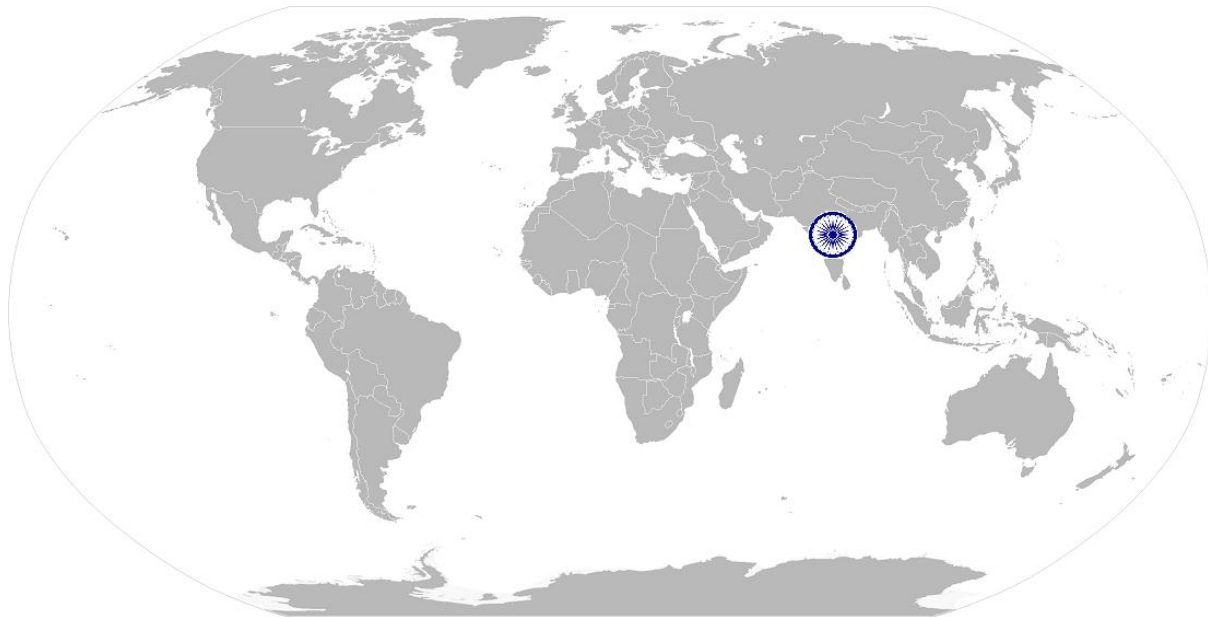
	<p>You need to know and understand how to:</p> <p>SB1. make decisions on suitable courses of action</p> <p>SB2. follow rule-based decision-making processes</p>
	<p>Plan and Organize</p>
	<p>You need to know and understand how to:</p> <p>SB3. plan and organize your work to achieve targets and deadlines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

SSC/N3021

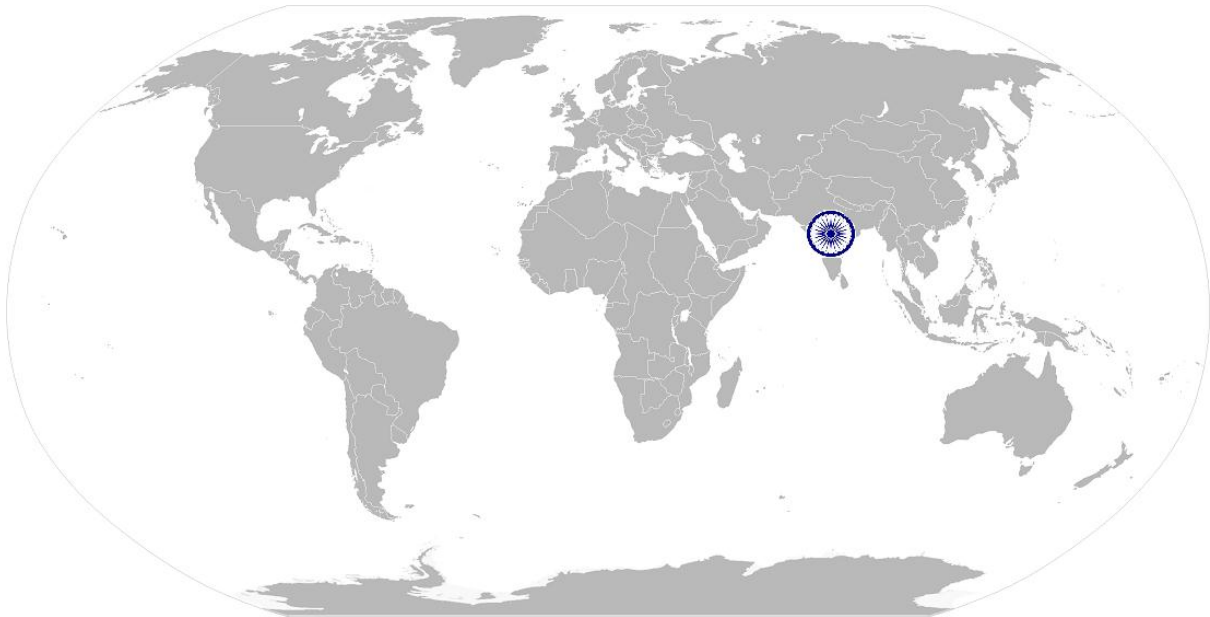
Deal remotely with customer queries

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



Overview

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

Applicable NOS Unit

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	<p>This unit/task covers the following:</p> <p>Work requirements:</p> <ul style="list-style-type: none"> • 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) <p>Appropriate people:</p> <ul style="list-style-type: none"> • line manager • the person requesting the work • members of the team/department • members from other teams/departments <p>Resources:</p> <ul style="list-style-type: none"> • equipment • materials • information
Performance Criteria (PC) w.r.t. the Scope	
	<p>To be competent on the job, you must be able to:</p> <p>PC1. establish and agree your work requirements with appropriate people</p> <p>PC2. keep your immediate work area clean and tidy</p> <p>PC3. utilize your time effectively</p> <p>PC4. use resources correctly and efficiently</p> <p>PC5. treat confidential information correctly</p> <p>PC6. work in line with your organization's policies and procedures</p> <p>PC7. work within the limits of your job role</p> <p>PC8. obtain guidance from appropriate people, where necessary</p> <p>PC9. ensure your work meets the agreed requirements</p>
Knowledge and Understanding (K)	
A. Organizational Context (Knowledge of the company/ organization and its processes)	<p>You need to know and understand:</p> <p>KA1. the organization's policies, procedures and priorities for your area of work and your role and responsibilities in carrying out your work</p> <p>KA2. the limits of your responsibilities and when to involve others</p> <p>KA3. your specific work requirements and who these must be agreed with</p> <p>KA4. the importance of having a tidy work area and how to do this</p> <p>KA5. how to prioritize your workload according to urgency and</p>

SSC/N9001

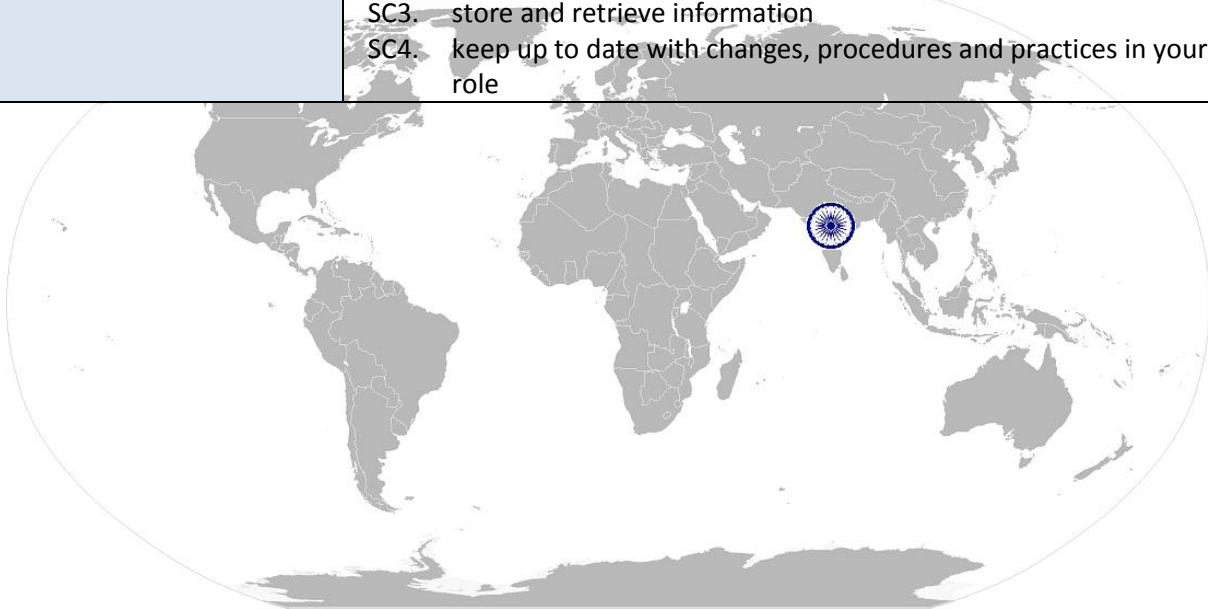
Manage your work to meet requirements

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



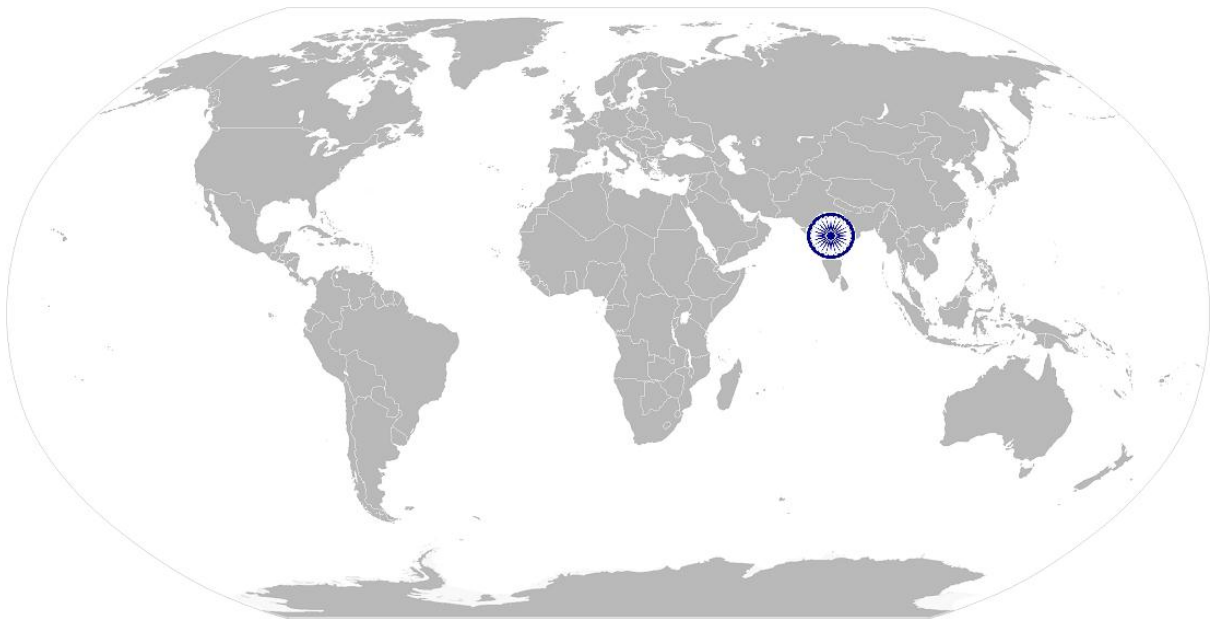
SSC/N9001
NOS Version Control

Manage your work to meet requirements

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



Overview

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

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	<p>This unit/task covers the following:</p> <p>Emergency procedures:</p> <ul style="list-style-type: none"> • illness • accidents • fires • other reasons to evacuate the premises • breaches of security <p>Resources(needed to achieve the unit objectives):</p> <ul style="list-style-type: none"> • information • government agencies in the areas of safety, health and security and their norms and services
	Performance Criteria (PC) w.r.t. the Scope	
		<p>To be competent, you must be able to:</p> <p>PC1. comply with your organization's current health, safety and security policies and procedures</p> <p>PC2. report any identified breaches in health, safety, and security policies and procedures to the designated person</p> <p>PC3. identify and correct any hazards that you can deal with safely, competently and within the limits of your authority</p> <p>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</p> <p>PC5. follow your organization's emergency procedures promptly, calmly, and efficiently</p> <p>PC6. identify and recommend opportunities for improving health, safety, and security to the designated person</p> <p>PC7. complete any health and safety records legibly and accurately</p>
	Knowledge and Understanding (K)	
A. Organizational Context (Knowledge of the company/ organization and its processes)	<p>You need to know and understand:</p> <p>KA1. legislative requirements and organization's procedures for health, safety and security and your role and responsibilities in relation to this</p> <p>KA2. what is meant by a hazard, including the different types of health and safety hazards that can be found in the workplace</p> <p>KA3. how and when to report hazards</p> <p>KA4. the limits of your responsibility for dealing with hazards</p> <p>KA5. the organisation's emergency procedures for different emergency situations and the importance of following these</p> <p>KA6. the importance of maintaining high standards of health, safety and security</p>	

SSC/N9003

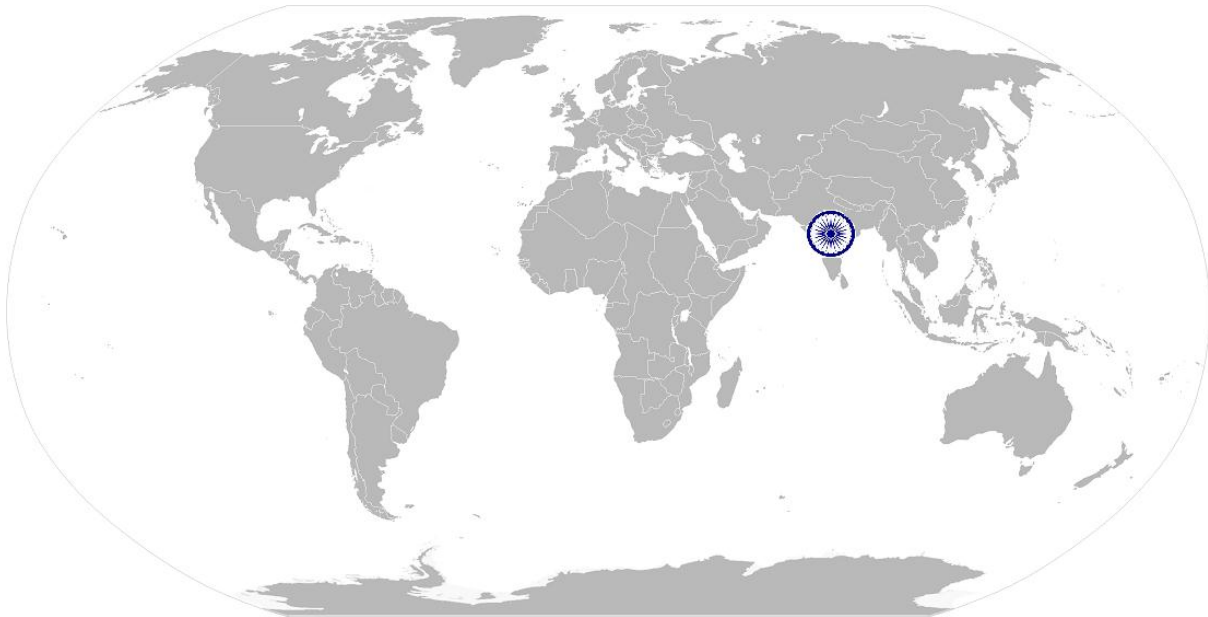
Maintain a healthy, safe and secure working environment

	KA7. implications that any non-compliance with health, safety and security may have on individuals and the organization
B. Technical Knowledge	<p>You need to know and understand:</p> <p>KB1. different types of beaches in health, safety and security and how and when to report these</p> <p>KB2. evacuation procedures for workers and visitors</p> <p>KB3. how to summon medical assistance and the emergency services, where necessary</p> <p>KB4. How to use the health, safety and accident reporting procedures and the importance of these</p>
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

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



SSC/N9003
NOS Version Control

Maintain a healthy, safe and secure working environment

NOS Code	SSC/N9003		
Credits(NVEQF/NVQF/NSQF) [OPTIONAL]	TBD	Version number	1.0
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