

Specification of Competency Standards of the Insurance Industry

Unit of Competency

Functional Area: Policy Service

Title	Train staff members to handle calls and evaluate quality of calls
Code	105570L5
Range	This unit of competency is applicable to those who are responsible for training staff members to handle phone calls and subsequently evaluating their quality of calls. It involves training staff members to handle calls, providing support to staff members to handle calls, and assessing staff members' ability to achieve prescribed service objectives.
Level	5
Credit	5 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Possess knowledge in service quality management <ul style="list-style-type: none"> • Comprehend corporate development strategy • Comprehend company's product terms and features • Comprehend relevant regulatory requirements on telemarketing • Possess knowledge in service system design 2(a). Train staff members on calls handling <ul style="list-style-type: none"> • Train staff members on product features, terms and conditions • Observe relevant regulatory requirements on telemarketing • Assess service needs that call centre will need to fulfill • Establish service objectives for both inbound and outbound calls • Prepare questions and scripts for staff members to follow • Train staff on phone etiquette and communication skills • Train staff on recording call details via call centre system 2(b). Evaluate quality of calls <ul style="list-style-type: none"> • Select calls for monitoring, e.g. on random basis • Assess staff ability to explain product features, terms and conditions to customers • Assess staff ability to handle customer questions • Assess staff ability to record essential customer details, e.g. reaction to company's products, in system • Evaluate handling effectiveness against prescribed objectives • Improve scripts to enhance call handling effectiveness 3. Ensure staff members are handling inbound and outbound calls effectively <ul style="list-style-type: none"> • Develop training programmes for relevant staff to facilitate their understanding on product features, terms and conditions • Provide uniform scripts to facilitate staffs' operation in a professional manner • Monitor calls to assess operational performance • Evaluate and adjust scripts to improve the effectiveness of call operations.
Assessment Criteria	<p>The integrated outcome requirements of this unit of competency are:</p> <ul style="list-style-type: none"> • Able to provide staff with sufficient and comprehensive training addressing to product knowledge and phone etiquette • Able to manage train staff to manage calls professionally in accordance to prescribed service objectives and • Able to assess operational performance in catering customer requirements and recording customer detail • Able to review and improve call operations.
Remark	This unit of competency is also applicable to general insurers and life insurers.