

Specification of Competency Standards of the Insurance Industry

Unit of Competency

Functional Area: Policy Service

Title	Manage call centre operations
Code	105569L5
Range	This unit of competency is applicable to those who are responsible for managing call centre operations. It involves assessing service needs, conducting capacity planning, developing call centre system, tracking operational performances, and managing the human resources and financial aspects of operations.
Level	5
Credit	6 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> 1. Possess knowledge in call centre operations <ul style="list-style-type: none"> • Comprehend corporate development strategy • Comprehend company's product terms and features • Comprehend relevant regulatory requirements on direct marketing • Possess knowledge in service system design 2(a). Establish call centre operations <ul style="list-style-type: none"> • Assess service needs that call centre will need to fulfill • Forecast call flow to analyze inbound and outbound service demand • Conduct capacity planning • Develop centre-specific service targets, e.g. efficiency, quality, and sales • Develop call centre system, e.g. customer interaction system 2(b). Manage call centre operations <ul style="list-style-type: none"> • Monitor calls to track operational performance • Handle complaints • Analyze call statistics and relevant data to analyze performance levels • Liaise with human resource personnel to handle staff recruitment • Organize staff work patterns to meet service demand • Manage financial aspects of operations, e.g. budgeting • Explore new facilities to improve operational efficiency 3. Ensure call centre operations support corporate development <ul style="list-style-type: none"> • Develop call centre operation system based on estimation of service volume, needs and targets • Monitor calls to inspect operational performances • Coordinate and organize responsible personnel to perform call service.
Assessment Criteria	<p>The integrated outcome requirements of this unit of competency are:</p> <ul style="list-style-type: none"> • Able to establish call centre operation system through assessment of service requirement and predicted call flow • Able to manage call centre operations in accordance with corporate development and relevant regulatory requirements. • Able to monitor calls to facilitate performance evaluation • Able to generate call statistics to facilitate future statistical analysis • Able to develop new facilities to enhance operational efficiencies.
Remark	This unit of competency is also applicable to general insurers and life insurers.