



EXTERNAL INTEGRATED SUMMATIVE ASSESSMENT

EXEMPLAR- WRITTEN ASSESSMENT- PAPER 1

MEMORANDUM

CANDIDATE INFORMATION

SURNAME													
NAMES													
ID NUMBER													
EISA REGISTRATION NUMBER													
ASSESSMENT CENTRE													
ASSESSMENT CENTRE ACCREDITATION NUMBER													

QUALIFICATION INFORMATION

QUALIFICATION TITLE	Occupational Certificate: Contact Centre Manager
SAQA ID	99687
NQF LEVEL	5
CREDITS	285
DURATION	2 hours 30 minutes
TOTAL MARKS	120
PASS MARK	60
DATE OF EISA	

GENERAL EISA RULES

1. Candidates are **only** allowed to use the supplied EISA booklets.
2. Candidates are **only** allowed to use a black pen for their answers.
3. Candidates to ensure that their name, surname and EISA registration number appear on the front of your EISA booklet.
4. This is a closed-book examination.
5. All EISA booklets must be handed back to the invigilator intact. No pages may be torn off from the EISA booklet. The removal of EISA booklets from the examination room is prohibited.
6. Candidates may make use of a calculator in this EISA.
7. Unless this is an online examination where access to a computer will be made available to you, the use of any communication devices, including smart watches, cell phones, tablets, iPads, headphones and laptops is prohibited.
8. All cell phones are to be switched off for the duration of the EISA.
9. The invigilator will not assist you with the explanation of questions related to the EISA.
10. Candidates are prohibited from conversing in any manner with other candidates.
11. Candidates may not leave the examination venue within one hour of the start of the examination and in the last 10 minutes of the allotted examination period.
12. Candidates who are found to be disruptive and unruly in the assessment centre will be requested to leave the assessment centre by the invigilator.

I HEREBY CONFIRM THAT I HAVE READ THE ABOVE EISA RULES AND
DECLARE THAT I UNDERSTAND AND ACCEPT THE RULES.

SIGNATURE OF STUDENT

INSTRUCTIONS TO CANDIDATES

1. Candidates must complete all questions in this EISA.
2. Candidates must ensure that they use only a black pen when completing this EISA.
3. Should you require additional space to complete your answer, please request additional paper from your invigilator. Ensure that you indicate your name, surname, and EISA registration number at the top of the additional paper. Also, ensure that the question number is marked on your additional paper.

QUESTION 1

1.1. Read the following case study and answer the question/s that follow:

As the newly appointed Contact Centre Manager for Roselyn Telecoms, you have been tasked with drawing up the budget for your department for the year ending December 2025. Their projected cash flows are as follows

- Customer Acquisition Campaigns: ZAR 1,000,000
- Staff Training Programs: ZAR 800,000
- Revenue from Outbound Calls: ZAR 10,000,000
- Stationery and Other Supplies: ZAR 300,000
- Revenue from Inbound Customer Support Calls: ZAR 8,000,000
- Fees for Business Consulting and Training: ZAR 1,500,000
- Phone Line and Internet Services: ZAR 1,200,000
- Salaries and Wages: ZAR 12,000,000

a. Define the term budget (2)

A **budget** is a financial plan that estimates an organization's expected **income and expenses** over a specific period of time. It is used to guide spending, allocate resources, and ensure financial control.

b. Draw up a budget for Roselyn Telecoms for the year ending December 2025 (8)

Roselyn Telecoms Budget

Item	Amount (ZAR)
Income	
Revenue from Outbound Calls	10,000,000
Revenue from Inbound Customer Support Calls	8,000,000
Fees for Business Consulting and Training	1,500,000
Total Income	19,500,000
Expenses	
Customer Acquisition Campaigns	1,000,000

Staff Training Programs	800,000
Stationery and Other Supplies	300,000
Phone Line and Internet Services	1,200,000
Salaries and Wages	12,000,000
Total Expenses	15,300,000
Net Profit (Income – Expenses)	4,200,000

Summary

Roselyn Telecoms is projected to make a **net profit of ZAR 4,200,000** for the year ending December 2025.

Marking Guide for Budget (8 Marks)

Criteria	Marks
Correct identification and listing of all income items (3 items)	3
Correct identification and listing of all expense items (5 items)	2
Correct calculation of Total Income (ZAR 19,500,000)	1
Correct calculation of Total Expenses (ZAR 15,300,000)	1
Correct calculation of Net Profit (ZAR 4,200,000)	1
Total	8

Marker's Notes:

- Award **partial marks** if some items are correctly classified under income or expenses.
- If totals are incorrect but method is correct, award **method marks** where applicable.
- Accept minor formatting differences (e.g., table vs list) as long as figures are clearly presented.

1.2 Read the following case study and answer the question/s that follow:

Melody Call Centre, based in Randburg, South Africa, is a mid-sized contact centre serving telecom clients across Southern Africa. Facing rising operational costs in early 2026, management implemented new budget controls, but performance issues emerged.

Melody employs 150 agents handling inbound customer queries, with annual revenue of ZAR 50 million and expenses totalling ZAR 45 million. Key costs include agent salaries (60%), technology (20%), and overheads (20%). In Q1 2026, the centre exceeded its ZAR 12 million quarterly budget by 15% due to overtime and tech upgrades.

Unexpected call volumes from a client promo spiked average handle time to 420 seconds, driving overtime costs up 25%. Technology investments in a new Workforce Management (WFM) system overran by ZAR 1.2 million, as initial forecasts ignored integration delays. Agent attrition hit 22%, increasing recruitment spend by 18% without prior variance tracking.

Daily dashboards track KPIs like cost-per-contact (target: ZAR 50; actual: ZAR 65) and occupancy (target: 85%; actual: 92%). Weekly variance reports compare actuals vs. budget, flagging overruns >10%. However, manual data entry causes 48-hour delays in alerts.

A responsibility centre structure designates the operations manager as cost centre head, accountable for agent scheduling variances. Incentives tie 20% of supervisor bonuses to budget adherence, but lack first-line agent input leads to poor buy-in. Zero-based budgeting was adopted for Q2, requiring justification for all expenses.

The WFM system integrates with IVR and CRM for real-time forecasting, but underutilization stems from inadequate training—only 60% of supervisors access analytics. Monthly MI reports highlight trends like peak-hour inefficiencies, yet actionable insights are siloed, with no automated alerts for thresholds.

1.2.1 Melody's training budget for the quarter is 30,000. Actual spending is 25,000, but customer complaints about agent knowledge have increased. How should management interpret this variance? (1)

- A. The underspend may signal underinvestment in training, contributing to service problems
- B. The variance means the training budget was too high and should be cut further

- C. The 5,000 underspend is clearly positive and indicates strong budget control
- D. The underspend proves that training has become more efficient with no negative effects

1.2.2 Melody's management wants to strengthen budget control by linking call centre performance metrics to budget responsibility. Which combination of metrics would best support this objective? (1)

- A. Total call received, number of outbound calls, and number of breaks taken by agents
- B. Marketing reach, social media likes, and website hits
- C. Average handling time, staff turnover rate, and number of customer complaints
- D. Electricity usage, office rent, and number of computers installed

1.2.3 Melody's monthly budget shows call centre salary costs of 120,000, but actual salary costs are 135,000 due to unexpected overtime. What is the salary cost variance, and how should it be interpreted? (1)

- A. 135,000 favourable, indicating savings on salaries
- B. 15,000 adverse, indicating higher costs than planned
- C. 15,000 favourable, indicating strong cost control
- D. 255,000 adverse, indicating serious overspending

1.2.4 Which enhancement to Melody's management information system (MIS) would most directly improve the monitoring of budget variances in real time? (1)

- A. Implementing a dashboard that compares daily actual costs and key metrics against budget and targets
- B. Recording only total monthly expenses without category breakdowns
- C. Focusing the MIS solely on customer satisfaction scores without financial data
- D. Introducing an annual paper-based budget report for senior management

1.2.5 Management at Melody suspects that call routing inefficiencies are increasing telecom costs beyond budget. Which management control would best address this issue? (1)

- A. Implementing regular process reviews of call flows and routing rules, supported by MIS reports
- B. Increasing the overall budget for telecom costs without investigation

- C. Reducing staff training to save money and hoping routing improves over time
- D. Fixing telecom cost budgets and banning all changes to call routing

1.2.6 Melody compares the budgeted number of calls per agent per day with the actual number and finds that actual call volume is much higher than budgeted. Salary and overtime costs are also over budget. How should this situation be interpreted? (1)

- A. Higher call volume should always reduce costs, so the overspend is inexplicable
- B. This proves the budget was perfectly accurate and needs no revision
- C. The overspend may be justified by higher activity levels, so a volume variance analysis is needed
- D. The overspend automatically indicates poor management performance

1.2.7 Which of the following best describes a key weakness in Melody's existing budget monitoring if managers rely only on high-level monthly totals? (1)

- A. They will automatically detect all process issues
- B. They may miss important patterns and causes of variances hidden within detailed data
- C. They will be able to control costs perfectly without further analysis
- D. They will have too much information to make decisions

1.2.8 In the Melody case, which combination of management controls would best support both service quality and budget discipline? (1)

- A. Centralising all decisions with senior management so frontline managers have no budget authority
- B. Only financial penalties for managers who overspend their budgets
- C. Allowing managers to focus solely on service quality and ignore financial targets
- D. Clear delegation of budget responsibilities, performance-based incentives, and regular review of MIS report

Question number	Answer
1.2.1	A
1.2.2	C
1.2.3	B
1.2.4	A

1.2.5	A
1.2.6	C
1.2.7	B
1.2.8	D

1.3 Read the following case study and answer the question/s that follow:

During a meeting with the accountant for Ankole Call Centre, he states that the term 'concepts' includes those basic assumptions or conditions on which the science of accounting is based.

1.3 As the Contact Centre Manager for the company, list and explain any 5 accounting concepts that you would utilise in managing the accounting process for the company (5 marks)

Marking Guideline: Accounting Concepts (5 Marks)

Criteria	Marks
Identification of any relevant accounting concept (any 5 × 1 mark each)	5
Explanation is included but no additional marks awarded (max 1 per concept)	
Total	5

Acceptable Accounting Concepts (Any 5):

Markers should accept any of the following (or similar relevant concepts):

- **Going Concern Concept** – The business is assumed to continue operating into the foreseeable future.
- **Accrual Concept** – Income and expenses are recorded when they are earned or incurred, not when cash is received or paid.
- **Consistency Concept** – The same accounting methods should be used from period to period.
- **Prudence (Conservatism) Concept** – Expenses and liabilities are recorded as soon as possible, but income only when certain.
- **Business Entity Concept** – The business is treated as separate from its owner(s).
- **Historical Cost Concept** – Assets are recorded at their original purchase price.

- **Matching Concept** – Expenses should be matched with the revenue they generate.

Marker's Notes:

- Award **1 mark per correct concept with a reasonable explanation.**
- Do **not award marks** for vague or incorrect explanations.
- Accept equivalent wording if the meaning is clear.

1.4 Read the following case study and answer the question/s that follow:

As a Contact Centre Manager, you should have a working knowledge of the financial aspects of running a call centre

1.4.1 How do you identify discrepancies in budgets and financial reports and recommend corrective actions where necessary. (8 marks)

The learner will be awarded 1 mark identifying discrepancies and 1 mark for corrective actions and answers can include but are not limited to

Assessors' discretion applies

How to identify discrepancies

Regularly compare actual financial performance against budgeted figures using variance analysis, focusing on key call centre metrics like agent staffing costs, shrinkage (e.g., absenteeism or idle time), average handle time (AHT), and call volume expenses. Review financial documents such as bank statements, invoices, payroll records, and reports to spot inconsistencies, such as overspending on overtime or unexpected IT support costs, by cross-checking transactions and categorizing variances as favorable or unfavorable.

Conduct periodic reconciliations and audits, prioritizing high-impact areas like labor (often 60-70% of call centre budgets) to detect issues early, such as gaps between forecasted and actual service levels leading to unbudgeted overtime.

Recommending Corrective Actions

Once discrepancies are pinpointed, investigate root causes—e.g., poor shrinkage forecasting or volume spikes—and implement targeted fixes like adjusting agent schedules, renegotiating vendor contracts, or reducing non-essential expenses to realign with budget

targets. Document adjustments with approval processes, revise future budgets (e.g., increasing shrinkage allowances from 30% to 35% if unmanaged), and introduce controls like SOPs for expense tracking or staff training to prevent recurrence. Monitor post-correction via follow-up reviews, communicating transparently with stakeholders on impacts, such as cutting advertising spend by reallocating \$2,000 to labor without sacrificing service levels.

Build an Excel budget variance model for a call centre tracking agent costs, shrinkage, AHT, call volume vs budget with alerts for 5%+ discrepancies.

Item	2022 (ZAR '000)	2023 (ZAR '000)
Revenue	5,000	6,250
Cost of Services	(2,500)	(3,000)
Gross Profit	2,500	3,250
Operating Expenses		
- Salaries	(1,500)	(1,875)
- Rent & Utilities	(400)	(500)
- Marketing/Admin	(300)	(400)
Operating Profit	300	475
Taxes (28%)	(84)	(133)
Net Profit	216	342

1.5 Read the following case study and answer the question/s that follow:

Vulindlela Call Centre, a small operation based in Koster, South Africa, provides outsourced customer support services. This information below illustrates sample financial statements for 2022 and 2023.

Income Statement

Statement of Financial Position

Assets	2022 (ZAR '000)	2023 (ZAR '000)
Current Assets		
- Cash	500	750
- Accounts Receivable	800	1,000
Non-Current Assets		
- Equipment/Office	1,200	1,400
Total Assets	2,500	3,150

Liabilities & Equity	2022 (ZAR '000)	2023 (ZAR '000)
---------------------------------	------------------------	------------------------

Liabilities & Equity	2022 (ZAR '000)	2023 (ZAR '000)
Current Liabilities		
- Accounts Payable	400	500
Long-Term Debt	800	700
Total Liabilities	1,200	1,200
Equity		

Liabilities & Equity	2022 (ZAR '000)	2023 (ZAR '000)
- Retained Earnings	216	558
- Owner's Capital	1,084	1,392
Total Equity	1,300	1,950
Total Liabilities & Equity	2,500	3,150

1.5.1 You are required to analyse and interpret the financial statements of Vulindlela call centre. (6)

Marking Guideline: Financial Statement Analysis (6 Marks)

Criteria	Marks
Identification and discussion of profitability trend (increase in gross & net profit)	1
Identification and discussion of revenue growth (increase from 5,000 to 6,250)	1
Analysis of expense trends (increase in operating expenses)	1
Analysis of liquidity position (increase in cash and receivables)	1
Analysis of solvency/financial stability (liabilities stable, equity increased)	1
Overall conclusion/interpretation of performance	1
Total	6

Marker's Notes:

- Learners must **interpret**, not just copy figures.
- Award marks for **valid comments supported by figures or trends**.
- Accept equivalent interpretations such as:
 - Improved profitability
 - Business growth
 - Better financial position
- Award **partial marks** where analysis is attempted but incomplete.

1.6 As the Contact Centre Manager for Tele sale identify any 4 financial risks that may face your call centre and analyse consequences of not mitigating the identified risks (8)

Marking Guideline: Financial Risks and Consequences (8 Marks)

Criteria	Marks
Identification of any relevant financial risk (any 4 × 1 mark each)	4
Appropriate analysis of consequence for each identified risk (any 4 × 1 mark each)	4
Total	8

Acceptable Financial Risks (Any 4):

Markers should accept any relevant risks such as:

- **Cash flow problems**
- **High operating costs**
- **Bad debts (non-paying customers)**
- **Revenue decline/loss of clients**
- **Fraud or financial mismanagement**
- **Over-reliance on one client**
- **Rising technology/telecom costs**

Examples of Consequences:

- **Cash flow problems → inability to pay salaries or suppliers**
- **High costs → reduced profitability or losses**
- **Bad debts → loss of income and financial strain**
- **Loss of clients → reduced revenue and possible downsizing**
- **Fraud → financial losses and reputational damage**

Marker's Notes:

- **Award 1 mark for each valid risk and 1 mark for a relevant consequence.**

- Responses must show **clear linkage between risk and consequence**.
- Accept reasonable, well-explained answers even if wording differs.

SUB- TOTAL: 45 marks

QUESTION 2

2.1 Read the following case study and answer the question/s that follow:

A contact centre is evaluating three headset suppliers. One is slightly more expensive but has strong labour rights certifications and transparent audit reports. The second is the cheapest but refuses to share factory audit information. The third has mid-range pricing with minimal documentation.

2.1.1 Which supplier choice best reflects ethical, transparent and compliant procurement principles? (1)

- A. Select the cheapest supplier to minimise costs for the contact centre
- B. Delay the decision and continue buying ad hoc from any available supplier
- C. Select the supplier with strong labour rights certifications and transparent audit reports
- D. Select the mid-priced supplier to balance cost and perceived risk

2.1.2 A major client asks your contact centre to prove that all outsourced customer survey services follow data privacy regulations and ethical calling practices. What is the most appropriate procurement and supplier management action? (1)

- A. Rely on a signed non-disclosure agreement and provide it to the client
- B. Assure the client that internal staff training covers data privacy, without involving the supplier
- C. Request and review evidence of the supplier's compliance certifications, policies, and monitoring processes
- D. Ask the supplier to verbally confirm they follow all regulations

2.1.3 Your contact centre is tendering for a new workforce management (WFM) software platform. One potential supplier offers a low upfront price but locks the contract for 7 years with steep termination fees and no performance-based clauses. Which evaluation best reflects cost-effective and transparent procurement principles? (1)

- A. Reject the supplier because a long contract is always unethical

- B. Assess total cost of ownership, contract flexibility and performance clauses before deciding
- C. Ask the supplier to remove termination fees but keep the long, fixed-term contract
- D. Accept the low upfront price because it reduces immediate budget pressure

2.1.4 You discover that a small outsourcing partner handling overflow calls sometimes uses informal scripts that do not include required disclosures about call recording. What is the most appropriate supplier management response? (1)

- A. Work with the supplier on a corrective action plan, including training and monitoring
- B. Ask agents to speed through the required disclosure so calls are not delayed
- C. Immediately terminate the contract without discussion
- D. Ignore the issue because the partner handles only a small volume of calls

2.1.5 Your organisation's procurement policy requires at least three competitive quotes for any new contact centre technology over a set value. A senior manager pressures you to bypass this process to award work to a preferred supplier they have worked with previously. What is the most appropriate response? (1)

- A. Seek a written exception from procurement policy without providing justification
- B. Explain the policy, document the request, and proceed with a transparent competitive process
- C. Agree to the request to maintain a good relationship with the manager
- D. Inform the preferred supplier that they will definitely win to speed up negotiations

2.1.6 A cloud-based contact centre platform supplier proposes storing call recordings in a country with weaker data protection laws but lower costs. Which factor should be prioritised in your decision-making? (1)

- A. Prioritise the lowest cost option to maximise savings
- B. Leave the decision entirely to the supplier, as they are the technical experts
- C. Prioritise compliance with data protection regulations and customer expectations, even if costs are higher
- D. Accept the proposal but add a clause requiring the supplier to apologise if any issues arise

2.1.7 During contract negotiations, a potential supplier offers sports tickets to the procurement team to "celebrate the partnership" before the contract is awarded. How should you respond in line with ethical procurement practices? (1)

- A. Accept the tickets but disclose them after the contract is signed
- B. Give the tickets to another department so they are not linked to procurement
- C. Politely decline the offer and report it according to your organisation's gifts and hospitality policy
- D. Accept the tickets because they do not directly change the contract terms

2.1.8 You are tracking supplier performance for a provider that handles after-hours customer support calls. Complaints about slow response have increased, but the supplier's reports show they are meeting contractual targets. What is the most appropriate relationship management action? (1)

- A. Work with the supplier to review metrics, call flows and root causes, and revise targets if needed
- B. Reduce the supplier's fees unilaterally to punish poor performance
- C. Immediately terminate the contract for poor customer experience
- D. Ignore customer feedback because contractual metrics are being met

Question number	Answer
2.1.1	C
2.1.2	C
2.1.3	B
2.1.4	A
2.1.5	B
2.1.6	C
2.1.7	C
2.1.8	A

Read the following case study and answer the question/s that follow:

2.2. Below is an extract from an SLA between Gabriella call centre and Dotcom Software Solutions.

Service Level Agreement (SLA)

Between
Gabriellas Call Centre
(Located in Sandton, South Africa)
And
Dotcom Software Solutions
(Located in Khathu, South Africa)

The agreement is valid for 3 years, from January 1, 2023, to December 31, 2025.

Scope of Services

Dotcom provides proprietary software for call centre agents to handle inbound/outbound calls, including features for call routing, recording, CRM integration, and reporting. Exclusions cover third-party hardware failures or client data input errors.

Services operate 24/7, excluding scheduled maintenance notified 48 hours in advance.

Performance Metrics

Dotcom commits to these key performance indicators (KPIs), measured monthly:

Metric	Target	Measurement Method
Software Uptime	≥99.9% monthly	System logs
Incident Response Time	Critical: ≤15 min; High: ≤1 hour	Ticket system
Resolution Time	Critical: ≤4 hours; High: ≤24 hours	Ticket closure
Software Availability for Agents	≥99.5% during business hours	Agent login success rate

Gabriellas provides call volume forecasts for capacity planning.

Regulatory Compliance

Dotcom ensures the software complies with South African regulations, including POPIA for data protection (consent management, data retention limits, purpose limitation), ICASA rules on call practices, and emerging no-call lists. Features include audit logs, role-based access, auto-deletion of recordings, and opt-out tracking.

Gabriellas remains responsible for agent training on compliance.

Risk Management and Remedies

Non-compliance risks include fines up to ZAR 10 million under POPIA, operational disruptions, legal action, and reputational damage. Breaches trigger tiered remedies:

- Minor breach: Service credits (5-20% of monthly fee).
- Major/repeated: Performance improvement plan, fines, or termination rights without penalty.

Dotcom indemnifies Gabriellas against direct losses from software non-compliance.

Monitoring and Reporting

Dotcom delivers weekly dashboards and monthly reports on KPIs, compliance audits, and trends via secure portal. Root cause analysis provided for breaches.

Joint quarterly reviews adjust targets as needed.

Termination and Review

Either party may terminate with 60 days' notice for material breach after cure period. Annual reviews ensure alignment. Governed by South African law.

2.2.1 As the newly appointed Contact Centre Manager for Gabriella, write a report identifying the key deliverables for the SLA, as well as identifying possible noncompliance risks that might affect the execution of the SLA. (9)

Key Deliverables of the SLA

2.1 Software Provision and Functionality

Dotcom Software Solutions must provide reliable proprietary software that supports call centre operations, including call routing, call recording, CRM integration, and reporting capabilities.

2.2 System Availability and Uptime

The system must maintain a minimum uptime of 99.9% monthly and ensure at least 99.5% availability for agents during business hours.

2.3 Incident Management

Dotcom is required to respond to incidents within specified timeframes (≤ 15 minutes for critical issues and ≤ 1 hour for high-priority issues) and resolve them within agreed limits (≤ 4 hours for critical and ≤ 24 hours for high).

2.4 Continuous Service Operations

Services must operate 24/7, excluding scheduled maintenance that must be communicated at least 48 hours in advance.

2.5 Compliance with Regulations

The software must comply with South African regulations such as POPIA and ICASA, including features like consent management, audit logs, role-based access, and opt-out tracking.

2.6 Reporting and Monitoring

Dotcom must provide weekly dashboards and monthly performance reports, including KPI tracking, compliance audits, and root cause analysis for any breaches.

2.7 Risk Mitigation and Remedies

Dotcom must implement corrective actions for SLA breaches, including service credits, performance improvement plans, and indemnification for losses caused by non-compliance.

3. Possible Non-Compliance Risks

3.1 System Downtime and Performance Failures

Failure to meet uptime or availability targets could disrupt operations and lead to financial penalties or reputational damage.

3.2 Delayed Incident Response or Resolution

Slow response or resolution times may affect service delivery and customer satisfaction.

3.3 Regulatory Non-Compliance

Failure to comply with POPIA or ICASA regulations could result in legal penalties, fines, or reputational harm.

3.4 Data Security and Privacy Breaches

Inadequate data protection measures may expose sensitive customer data, leading to compliance violations and loss of trust.

3.5 Inadequate Reporting and Monitoring

Failure to provide accurate or timely reports may hinder performance evaluation and decision-making.

3.6 Poor Capacity Planning

If Gabriellas provides inaccurate call volume forecasts, it may lead to system overloads or underutilization.

3.7 Third-Party Dependencies

Exclusions such as hardware failures or client input errors could still impact service delivery and cause disputes.

Marking Guide (9 Marks Total)

Criteria	Marks Allocation
Identification of key deliverables (any 3–4 well-explained points)	4 marks
Identification of non-compliance risks (any 3–4 well-explained points)	4 marks
Structure, clarity, and relevance of report	1 mark

2.3 Read the following case study and answer the question/s that follow:

Netel Contact Centre, a mid-sized operation in Pretoria handling 5,000 daily calls for telecom clients, faces a critical escalation on March 25, 2026. A new VoIP supplier, TechLink Communications, selected via RFP in January, has caused widespread outages, dropping service levels from 82% to 45% within 20 seconds and spiking abandonment rates to 12%.

The Contact Centre Manager must now compile and analyse documentation to resolve the issue, address stakeholder concerns, and enforce corrective measures.

Records from January 2026 RFP process show TechLink selected over two competitors (VoicePro and NetCall) based on a scored matrix: 40% cost (\$0.02/min vs. \$0.025), 30% uptime SLA (99.5% promised), 20% scalability (support for 7,000 concurrent calls), and 10% support response (<1 hour). Vendor scorecard: TechLink scored 92/100; contract signed Feb 1 with penalties of 5% fee rebate per 0.5% uptime breach below 99.5%.

Service Level Agreements (SLAs)

Master SLA with primary client, Vodacom SA, mandates: 80/20 service level (80% calls answered ≤20s), ≤5% abandonment, ≥75% FCR, AHT ≤280s, CSAT ≥85%. TechLink sub-SLA: 99.5% uptime, ≤2s latency, 95% calls routed without error; breach triggers include >1% daily downtime (10 incidents logged March 1-25, totaling 15 hours lost).

Customer Complaints Records

CRM logs 342 complaints March 20-25 (vs. 45 avg/week): 68% "dropped calls/long waits," 22% "no audio/echo," 10% "IVR failures." Escalations: 15 VIP client cases (e.g., Case #4567: "Business line down 4hrs, lost R50k revenue"); CSAT plunged to 62%; repeat calls up 28%.

Performance Reports

MIS dashboard (Klipfolio-integrated) from March 25 shows:

Performance Reports	Performance Reports	Performance Reports	Performance Reports
MIS dashboard (Klipfolio-integrated) from March 25 shows:	MIS dashboard (Klipfolio-integrated) from March 25 shows:	MIS dashboard (Klipfolio-integrated) from March 25 shows:	MIS dashboard (Klipfolio-integrated) from March 25 shows:
Performance Reports	Performance Reports	Performance Reports	Performance Reports
MIS dashboard (Klipfolio-integrated) from March 25 shows:	MIS dashboard (Klipfolio-integrated) from March 25 shows:	MIS dashboard (Klipfolio-integrated) from March 25 shows:	MIS dashboard (Klipfolio-integrated) from March 25 shows:

Performance Reports	Performance Reports	Performance Reports	Performance Reports
Performance Reports	Performance Reports	Performance Reports	Performance Reports
MIS dashboard (Klipfolio-integrated) from March 25 shows:	MIS dashboard (Klipfolio-integrated) from March 25 shows:	MIS dashboard (Klipfolio-integrated) from March 25 shows:	MIS dashboard (Klipfolio-integrated) from March 25 shows:

TechLink formal notice (24hr fix or terminate), activates backup supplier, and schedules stakeholder briefing (10:00) with MIS visuals to rebuild trust while pursuing R500k compensation claim. This scenario tests integrated documentation use for accountability and recovery.

Root cause: TechLink network overload during peak (14:00-16:00); agent occupancy fell to 68% amid idle time.

Stakeholder Reporting Requirements

- Executives (CEO/CFO): Daily 1-page summary (SLA gaps, revenue at risk: R180k lost calls); weekly board pack with ROI impact.
- Client (Vodacom): Automated email alerts for breaches >5%; bi-weekly PDF with graphs, remediation ETA.
- Agents/Team Leads: Shiftly huddles via Teams with live dashboard; adherence scorecards.
- Regulator (ICASA): Monthly compliance filing if CSAT <70% sustained.

Financial Control Records

Budget tracker reveals: March overspend R450k (vs. R2.1m plan)—R320k overtime (extra shifts), R90k failover temp line, R40k refunds. TechLink invoice disputed: R180k billed vs. 15% penalty credit due (R27k). Forecast: Q1 overrun R1.2m without fix; contingency: Switch to VoicePro (setup R150k).

Management Information System Outputs

MIS auto-generated March 25 report (excerpt):

- Heatmap: Red zones 13:00-17:00; trend: Decline since March 15.
- Alerts: "SLA Breach: Uptime <99.5%—escalate TechLink."
- Recommendations: Invoke SLA penalty clause; test failover; re-forecast staffing +15 agents for peaks.
- Stakeholder View: Executive summary emailed 18:00; client portal updated.

KPI	Target	Actual	Variance
Service Level	80/20	45/35s	-35 pts
Abandonment	<5%	12%	+7 pts
AHT	280s	420s	+140s
FCR	75%	58%	-17 pts
Uptime	99.5%	96.2%	-3.3 pts

Root cause: TechLink network overload during peak (14:00-16:00); agent occupancy fell to 68% amid idle time.

Stakeholder Reporting Requirements

- Executives (CEO/CFO): Daily 1-page summary (SLA gaps, revenue at risk: R180k lost calls); weekly board pack with ROI impact.
- Client (Vodacom): Automated email alerts for breaches >5%; bi-weekly PDF with graphs, remediation ETA.
- Agents/Team Leads: Shiftly huddles via Teams with live dashboard; adherence scorecards.
- Regulator (ICASA): Monthly compliance filing if CSAT <70% sustained.

Financial Control Records

Budget tracker reveals: March overspend R450k (vs. R2.1m plan)—R320k overtime (extra shifts), R90k failover temp line, R40k refunds. TechLink invoice disputed: R180k billed vs. 15% penalty credit due (R27k). Forecast: Q1 overrun R1.2m without fix; contingency: Switch to VoicePro (setup R150k).

Management Information System Outputs

MIS auto-generated March 25 report (excerpt):

- Heatmap: Red zones 13:00-17:00; trend: Decline since March 15.
- Alerts: "SLA Breach: Uptime <99.5%—escalate TechLink."

- Recommendations: Invoke SLA penalty clause; test failover; re-forecast staffing +15 agents for peaks.
- Stakeholder View: Executive summary emailed 18:00; client portal updated.

Answer the following questions

2.3.1 A contact centre manager wants to understand why average handling time (AHT) has increased, but also whether this is harming customer satisfaction. Which combination of metrics is MOST appropriate to review together to get a balanced view? (1)

- A. Call abandonment rate, average speed of answer (ASA), shrinkage
- B. Number of calls offered, service level, agent adherence
- C. AHT, first contact resolution (FCR), customer satisfaction (CSAT) score
- D. Schedule efficiency, occupancy, agent turnover rate

2.3.2 A contact centre's SLA states: "80% of calls answered within 20 seconds." Last week, the centre answered 80% of calls, but the average speed of answer (ASA) was 60 seconds. What does this MOST likely indicate? (1)

- A. The SLA is no longer valid because ASA is a different metric from service level
- B. They exceeded their SLA, because the average speed of answer was tracked in addition to the SLA
- C. They met their SLA, because they answered 80% of calls, regardless of wait time
- D. They did not meet their SLA, because the time condition (20 seconds) was not achieved for 80% of calls

2.3.3 Which metric BEST measures how often customer issues are fully resolved in a single interaction, without the customer needing to contact the centre again for the same issue? (1)

- A. Service level
- B. First contact resolution (FCR)
- C. Occupancy
- D. Abandonment rate

2.3.4 A manager notices that occupancy is consistently above 95% throughout the day. What is the MOST likely risk if this pattern continues over time? (1)

- A. Under-utilisation of agents and excessive idle time
- B. Significant overstaffing leading to high labour cost
- C. Increased agent stress, burnout, and declining quality
- D. Poor data quality in the management information system

2.3.5 In designing an SLA for an email contact channel, which target is MOST appropriate and realistic? (1)

- A. "50% of emails answered within 48 hours"
- B. "Average handling time for emails below 30 seconds"
- C. "100% of emails answered instantly"
- D. "90% of emails answered within 4 business hours"

2.3.6 Which statement BEST describes the role of a management information system (MIS) in a contact centre? (1)

- A. It is only responsible for routing calls to the right agent based on skills
- B. It transforms raw operational data into actionable metrics and reports for planning and performance management
- C. It is mainly used to record voice calls for legal compliance reasons
- D. It replaces the need for workforce management and quality assurance functions

2.3.7 Management wants to reduce abandonment rate without significantly increasing labour cost. Which strategy is MOST aligned with this goal? (1)

- A. Increase forecast accuracy and adjust schedules to better match staffing with call arrival patterns
- B. Turn off call queuing so that customers receive busy tones instead of waiting
- C. Lower the SLA target so that it is easier to meet with existing staffing
- D. Hire a large number of additional agents to ensure almost no one ever waits

2.3.8 Which of the following is the BEST example of a well-defined contact centre SLA for voice calls? (1)

- A. "We aim to have short queues most of the time"
- B. "We will answer your call as quickly as possible"
- C. "Agents will try their hardest to respond promptly"
- D. "80% of calls answered within 30 seconds during business hours"

2.3.9 How much money was spent on refunds in March? (1)

- A. R320 000

- B. R20 000
- C. R 320 000
- D. R460 000

2.3.10 Which practice BEST supports data-driven decision-making using MIS reports in a contact centre? (1)

- A. Allowing each supervisor to create their own private spreadsheets without common definitions
- B. Reviewing key performance dashboards regularly and combining them with qualitative feedback from agents and customers
- C. Ignoring anomalies in reports unless customers complain
- D. Relying solely on a single metric (such as AHT) to judge overall performance

Question number	Answer
2.3.1	C
2.3.2	D
2.3.3	B
2.3.4	C
2.3.5	D
2.3.6	B
2.3.7	C
2.3.8	D
2.3.9	C
2.3.10	B

2.4. How can you improve customers' satisfaction, and ensure financial accountability in a contact centre environment. (8)

Learner answer can include any of the following

Assessors' discretion applies

Train agents effectively: Provide ongoing training in empathy, product knowledge, and communication skills to boost first-contact resolution and customer delight.

Leverage technology: Deploy AI chatbots, IVR self-service, and omnichannel platforms to minimize wait times and handle routine queries efficiently.

Monitor real-time metrics: Use dashboards for KPIs like CSAT, AHT, FCR, and abandonment rates to enable immediate coaching and process tweaks.

Gather feedback loops: Implement post-call surveys, NPS scoring, and sentiment analysis to identify pain points and drive continuous improvement.

Optimize workforce: Forecast demand accurately, schedule smartly, and use skills-based routing to cut overtime costs while ensuring service levels.

Track financial KPIs: Monitor cost per contact, agent utilization, sales uplift, and ROI on tech investments for strict accountability.

Promote compliance & audits: Enforce data security, regular financial audits, and adherence to SLAs to mitigate risks and protect revenue.

SUB- TOTAL: 35 marks

QUESTION 3

Question 3.1

3.1.1 Define the term Management Information System

(2 marks)

A Management Information System (MIS) is a structured system that collects, processes, stores, and distributes information to support managerial decision-making and organizational operations.

It helps managers' access timely and accurate information for planning, controlling, and coordinating business activities.

3.1.2 You are the Contact Centre Manager Bernies Debt Collection Services based in Kimberly.

You are required to compile a report explaining how you would use management information systems in controlling costs. (8 marks)

Report: The Use of Management Information Systems (MIS) in Controlling Costs at Bernies Debt Collection Services

1. Introduction

Management Information Systems (MIS) play a critical role in supporting management decisions and improving operational efficiency. In a debt collection contact centre, MIS can be used to monitor, analyse, and control costs effectively.

2. Use of MIS in Controlling Costs

2.1 Monitoring Operational Expenses

MIS provides real-time data on operational costs such as salaries, call charges, and system usage. This enables management to track spending and identify areas where costs can be reduced.

2.2 Workforce Management and Scheduling

MIS helps optimise staff scheduling by analysing call volumes and agent performance. This prevents overstaffing or understaffing, thereby reducing unnecessary labour costs.

2.3 Performance Measurement and Productivity Analysis

Through key performance indicators (KPIs), MIS evaluates agent productivity (e.g., calls

handled, recovery rates). Poor performance can be addressed through training or corrective action, improving efficiency and reducing waste.

2.4 Budgeting and Forecasting

MIS supports accurate budgeting by analysing historical data and predicting future trends. This helps management allocate resources efficiently and avoid overspending.

2.5 Identifying Inefficiencies

MIS highlights inefficiencies such as long call handling times or high call abandonment rates. Addressing these issues can reduce operational costs and improve service delivery.

2.6 Resource Utilisation

MIS ensures optimal use of resources such as technology and staff. It helps prevent underutilisation or overuse, both of which can increase costs.

2.7 Reporting and Decision-Making

Regular reports generated by MIS provide insights into cost drivers, enabling informed decision-making and strategic cost control measures.

2.8 Reduction of Errors and Fraud

Automated systems reduce human errors in data entry and financial tracking, minimising losses and preventing fraud-related costs.

3. Conclusion

MIS is an essential tool for controlling costs in a contact centre environment. By providing accurate, timely, and relevant information, it enables management to improve efficiency, reduce waste, and enhance overall financial performance.

Marking Guide (8 Marks Total)

Criteria	Marks Allocation
Explanation of MIS use in cost control (any 4 well-explained points)	6 marks
Relevance to contact centre/debt collection environment	1 mark
Structure, clarity, and presentation	1 mark

Total: 8 Marks

Read the following case study and answer the question/s that follow:

New Mutual Insurance, a mid-sized insurer based in Edenvale, Gauteng, South Africa, operates a contact center handling policy inquiry, claims processing, and customer support for 250,000 policyholders. New Mutual's Edenvale contact center serves business objectives like 95% first-call resolution (FCR), <5% abandonment rate, and 85% customer satisfaction (CSAT) scores amid rising digital expectations. Technology must integrate telephony (IVR/ACD), multi-media (chatbots, WhatsApp, app portals), and CRM while constrained by budget (ZAR 12M annually), legacy systems, and data privacy (POPIA compliance).

Core systems must support omnichannel interactions aligned to customer expectations for speed (<30s wait) and personalization.

Telephony• : Cloud PBX with skills-based routing, predictive dialers for outbound sales, and speech analytics for sentiment tracking.

Multi-Media Platforms: WhatsApp Business API, live chat via website/app, email ticketing, and self-service IVR with AI NLP for claim status.

Backend Integration: CRM (e.g., Salesforce) linked to policy database; real-time dashboards for agent performance.

Current Applications and Outputs

The centre uses a hybrid setup generating key outputs but facing gaps.

Platform	Application	Key Outputs	Customer Expectation Met?
IVR/Telephony (Avaya)	Call routing, automated menus	70% self-service deflection; AHT 320s	Partial—voice recognition fails 20% of accents
WhatsApp/Chatbot	Query resolution, doc upload	15K interactions/month; 60% resolution rate	Yes—millennials prefer (92% response rate)
Web Portal/App	Policy access, claims submission	40K logins/month; 25% claim automation	No—downtime spikes during peaks

Platform	Application	Key Outputs	Customer Expectation Met?
CRM Dashboard	Agent scripting, real-time alerts	CSAT 82%; FCR 88%	Partial—manual data entry slows

Operational limits hinder alignment with objectives.

- **Budget:** ZAR 12M cap restricts AI upgrades; telephony maintenance eats 40%.
- **Legacy Systems:** On-prem Avaya incompatible with cloud multi-media; integration lags 6 weeks.
- **Regulatory:** POPIA mandates consent tracking; PCI-DSS for payments blocks unencrypted chat.
- **Staff/Skills:** 120 agents; 30% turnover; training gaps in digital tools.
- **Scalability:** Peaks at 2,500 calls/hour overwhelm during claim seasons.

3.2. As the Contact Centre Manager for New Mutual insurance analyse the constraints facing the call centre and make recommendations on how the company can mitigate the effects of the constraints (10)

Model Answer

Assessor discretion applies

Primary Constraints Analysis

Any 5 applicable constraints (5x1)

Our contact centre faces budget limits (ZAR 12M cap), legacy Avaya telephony incompatible with cloud multi-media, POPIA/PCI-DSS regulatory hurdles, 30% agent turnover, and peak-hour scalability failures (2,500 calls/hour overload).

Mitigation Recommendations (5x1)

Any 5 applicable recommendations

Budget Reallocation (40% telephony maintenance savings):

Shift ZAR 1.2M from Avaya upkeep to cloud PBX migration (e.g., Genesys Cloud).

Phased rollout cuts integration costs by 25% via API connectors;

ROI via 20% AHT reduction (320s to 256s).

Legacy System Integration: Deploy middleware (e.g., MuleSoft) for hybrid Avaya-CRM linkage, enabling WhatsApp/portal data sync. This bridges 6-week lags, boosting self-service deflection from 70% to 85% without full replacement.

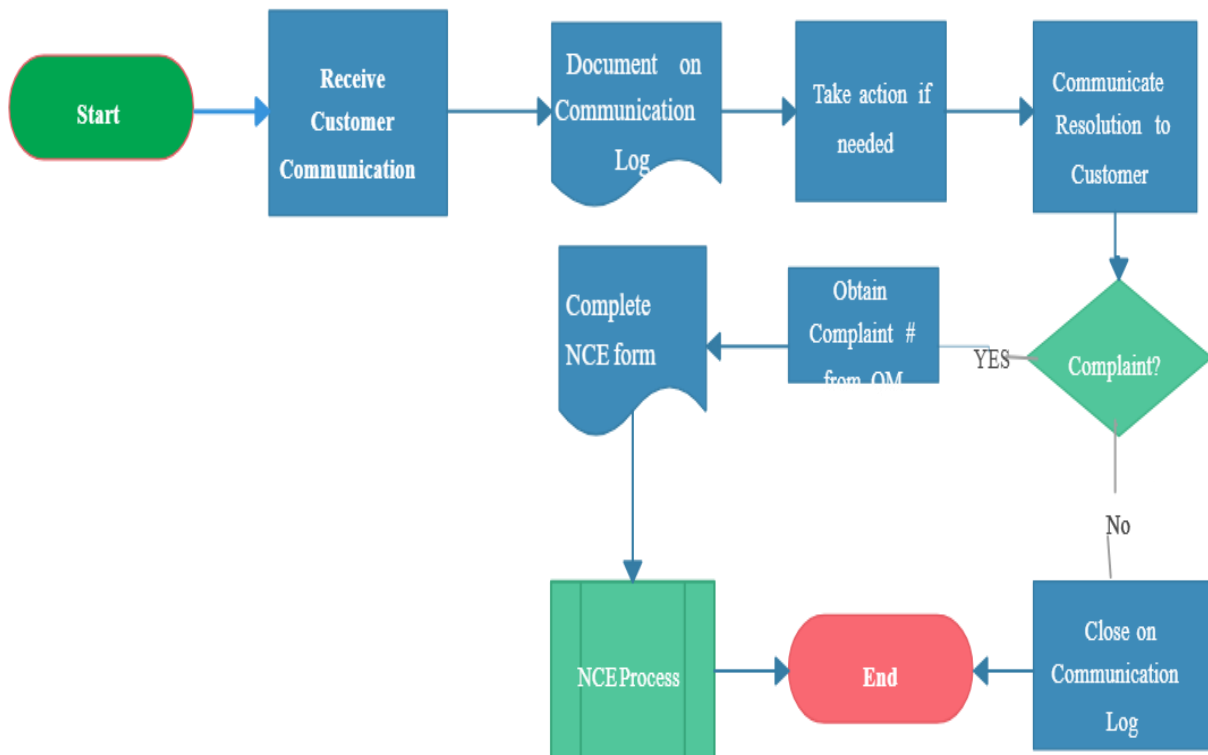
Regulatory Compliance Automation: Implement POPIA consent trackers in CRM and PCI-compliant tokenization for chat payments. AI-driven audit logs reduce manual checks by 60%, ensuring <1% breach risk while maintaining 24/7 access.

Staff Retention & Upskilling: Launch gamified training on digital tools (WhatsApp Business API, speech analytics) with ZAR 500k incentive budget. Targets 15% turnover drop; pair with real-time agent assist (e.g., AI prompts) to lift FCR to 92%.

Scalability via AI & Surge Capacity: Roll out NLP-powered chatbots for 40% routine query deflection during peaks, integrated with elastic cloud scaling. Outsource overflow to certified partners (e.g., 10x enrollment surges), projecting abandonment rate <3%.

3.3 Read the following case study and answer the question/s that follow:

The diagram below shows the steps undertaken when a consumer makes a phone call to a call up till the point their query is resolved. Every step in the process is subject to risk which may compromise the operation of the call centre



3.3.1 As the newly appointed Contact Centre Manager write a report identifying and explaining control measures and risk points in the process. (10)

Model answer

The learner's response may include but is not limited to the following responses

Assesses Discretion applies

To: Executive Management

From: Contact Centre Manager

Date: Any appropriate date

Subject: Risk Assessment - Complaints Process (2 marks for proper report format)

Executive Summary

Leletis' complaints process contains 7 critical risk points requiring immediate control measures. High-impact vulnerabilities include AI triage errors (15% false classification), supervisor bottlenecks, and compensation fraud exposure.

Learner can identify any 4 risks and get marks for identifying the process step and 4 marks for the corresponding control measure

Process Step AI Triage **Control Measure** Dual validation: AI + random 10% agent review; weekly accuracy audit

Process Step Self-Service **Control Measure** Timed escalation (24hrs); KB effectiveness tracking (>80% success)

Process Step Agent Screening **Control Measure** Mandatory 3-point checklist; real-time QA flags

Process Step Resolution Offer **Control Measure** Auto-approval limits (ZAR5k); tiered authority matrix

Process Step Supervisor Queue **Control Measure** Dedicated sup ratio (1:15); overflow SLA alerts

Process Step Root-Cause Tagging **Control Measure** Dropdown standardization; mandatory field validation

Process Step Analytics Dashboard **Control Measure** Daily MTTR report; automated training triggers (>5% recurrence)

3.4 Read the following case study and answer the question/s that follow:

Clicks Call Centre, based in Sasolburg, provides inbound customer-service support for Clicks Group clients, including pharmacy, wellness, and retail accounts. Agents handle large volumes of personal and sensitive information, such as customer names, addresses, medical-aid details, transaction histories, and payment-card information. The centre operates under POPIA (Protection of Personal Information Act), the CPA (Consumer Protection Act), and internal client-information-security standards that require strict confidentiality and secure handling of customer data.

In the past three months, several incidents have been logged that highlight confidentiality risks. An agent accidentally emailed a spread-sheet containing 150 customers' full names, ID numbers, and medical-aid details to a personal email address instead of the secure CRM inbox, exposing highly sensitive data to unauthorised access. A terminated agent was found to have copied customer account details onto a personal USB drive before leaving the company, indicating inadequate exit-process controls and data-access restrictions. Quality-assurance reviews also revealed that agents sometimes leave customer accounts open on screens during breaks and discuss order details in open areas where other customers or colleagues can overhear, creating opportunities for data leakage and unauthorised disclosure.

The centre has experienced one formal complaint from the Information Regulator and two client-service-level-agreement penalties for data-handling breaches. Management is concerned about the operational disruption, reputational damage, and potential financial penalties if confidentiality risks are not effectively controlled.

3.4.1 As a contact centre intern for Clicks call centre, list risks and measures to alleviate risks related to customer confidentiality (10 marks)

Model Answer

The learner will get 1 mark for identifying the risk and 1 mark for identifying the mitigating factor

Assessors' discretion

Risks related to customer confidentiality

Unauthorised disclosure of information – Agents may accidentally share customer details with the wrong person, such as reading out full account information over the phone or leaving sensitive data visible on screen.

Insecure data handling – Saving customer information on unsecured devices (e.g., USB drives, personal emails, or unprotected spreadsheets) can lead to data leaks or theft.

Poor access control – Allowing multiple users to share one login or failing to revoke access when staff leave or change roles increases the chance of unauthorised access.

Data overexposure on shared screens – Leaving customer accounts open on monitors during breaks or in open areas can allow others to see confidential information.

Insufficient training and awareness – Staff who do not fully understand POPIA, CPA, and company policies may unknowingly breach confidentiality rules in daily interactions.

Measures to alleviate these risks

Strict access and login controls – Ensure every agent has a unique login, passwords are changed regularly, and access is removed immediately when an employee leaves or changes roles.

Secure handling of customer data – Use only approved systems (e.g., encrypted CRM or secure email) to store and send customer information, and never copy or save data on personal devices.

Screen-locking and work-station hygiene – Agents must lock their screens when leaving their desks, close customer accounts between calls, and avoid discussing sensitive details in open or shared spaces.

Regular training and policy reinforcement – Provide ongoing training on confidentiality, data-protection laws, and company procedures, and require staff to sign compliance acknowledgements.

Monitoring and audits – Implement call-monitoring, quality reviews, and periodic data-handling audits to detect and correct confidentiality breaches before they escalate

SUB- TOTAL: 40 marks

TOTAL MARKS: 120 marks