



EXTERNAL INTEGRATED SUMMATIVE ASSESSMENT

EXEMPLAR- WRITTEN ASSESSMENT- PAPER 2

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
TOTAL MARKS	100
PASS MARK	50
DATE OF EISA	

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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.
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DECLARE THAT I UNDERSTAND AND ACCEPT THE RULES.

SIGNATURE OF STUDENT

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QUESTION 1

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

1.1 The newly appointed Contact Centre Manager for Ndabambi Telecoms call centre has been tasked with creating a question bank to be utilised for training new recruits. The question scope covers SLA and their uses in aligning operational objectives, targets, deliverables, and planning requirements with business targets. As a new recruit you are required to answer the following questions

1.1.1 In a contact centre, which statement best describes the role of a service level agreement (SLA) when aligning operations with business targets? (1)

- A. It primarily documents disciplinary procedures for agents who miss performance targets.
- B. It defines technical system specifications only, leaving customer experience metrics to separate documents.
- C. It sets internal staffing schedules without reference to customer expectations or business goals.
- D. It translates business expectations for responsiveness and quality into measurable targets for day to day operations.

1.1.2 A contact centre has an SLA to answer 80%80% of calls within 2020 seconds. Which operational planning action most directly supports meeting this SLA during forecasted peak periods? (1)

- A. Reducing the number of agents scheduled during peak times to lower labour costs.
- B. Increasing after call work time allowances so agents can complete detailed notes.
- C. Focusing exclusively on email response training instead of phone handling skills.
- D. Adjusting workforce schedules and adding temporary staff to match forecasted call volumes.

1.1.3 Which metric most directly measures performance against an SLA that commits to resolving 90%90% of customer complaints within 5 business days? (1)

- A. Percentage of complaints closed within 5 business days
- B. Net promoter score for all customers surveyed
- C. First contact resolution rate for all interactions
- D. Average speed of answer for inbound calls

1.1.4 How can clearly defined SLAs help manage stakeholder expectations in a contact centre environment? (1)

- A. By guaranteeing that no customer will ever experience a delay or service issue.
- B. By replacing the need for regular communication between operations and stakeholders.
- C. By providing transparent, agreed upon performance standards and reporting mechanisms.
- D. By allowing each stakeholder group to interpret service performance metrics in their own way.

1.1.5 A new marketing campaign is expected to double inbound call volumes for two weeks. To keep SLA commitments stable, which approach best demonstrates alignment between operational planning and business targets? (1)

- A. Maintaining current staffing and accepting that SLA performance will temporarily decline.
- B. Refusing the campaign unless the business agrees to lower SLA targets permanently.
- C. Proactively adjusting staffing, training, and queue strategies based on the forecasted campaign impact.
- D. Suspending SLA reporting for the duration of the campaign to avoid negative results.

1.1.6 Which of the following best illustrates a mismatch between SLAs and actual business priorities in a contact centre? (1)

- A. The SLA provides different service levels for different customer segments based on business value.
- B. The SLA targets and scorecards are reviewed quarterly with input from key business stakeholders.
- C. The SLA emphasises fast response times, but stakeholders care most about resolving complex cases correctly, even if it takes longer.
- D. The SLA includes both response time and quality measures, aligned with stakeholder feedback sessions.

1.1.7 In managing stakeholder expectations, why is it important to specify measurement rules and data sources within an SLA? (1)

- A. Because it removes the need to validate data quality or system accuracy.

B. Because consistent definitions ensure all stakeholders interpret performance results in the same way.

C. Because it allows each team to select whichever data supports their preferred narrative.

D. Because it ensures that only financial metrics are used to assess performance.

1.1.8 A contact centre consistently meets its SLA for average speed of answer but receives poor customer feedback about issue resolution. What does this suggest about the SLA design? (1)

A. The SLA focuses too heavily on responsiveness and does not adequately address quality or resolution outcomes.

B. The SLA is too ambitious and should be relaxed to reduce pressure on agents.

C. Meeting the speed of answer SLA automatically guarantees high customer satisfaction.

D. Customer feedback is unreliable and should be ignored if SLA targets are met.

1.1.9 Which action best demonstrates using SLA results to drive continuous improvement in a contact centre? (1)

A. Investigating root causes of SLA breaches and implementing targeted process, training, or staffing changes.

B. Reducing SLA targets each time they are not met to avoid difficult conversations.

C. Focusing only on intervals where the SLA was met and ignoring underperforming periods.

D. Publishing SLA reports but taking no specific action when targets are missed.

1.1.10 In a multi-channel contact centre (phone, email, chat), how should SLAs be designed to support realistic delivery and stakeholder satisfaction? (1)

A. Prioritise only the phone channel in the SLA, as it is traditionally the most important.

B. Avoid including chat in SLAs because it is difficult to measure performance there.

C. Set identical response time targets for all channels to simplify reporting.

D. Define channel specific SLAs that reflect different customer expectations and handling characteristics.

Question number	Answer
1.1.1	D
1.1.2	D

1.1.3	A
1.1.4	C
1.1.5	C
1.1.6	C
1.1.7	B
1.1.8	A
1.1.9	A
1.1.10	D

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

Amelias Florist operates a small call centre in Mamelodi, South Africa, handling customer inquiries for flower orders, deliveries, and custom arrangements amid high seasonal demand like Valentine's Day. The centre manages up to 200 calls daily, relying on service level agreements (SLAs) with wire services and e-commerce partners for order fulfilment. Targets include 80% of calls answered within 20 seconds, average handling time (AHT) under 360 seconds, and 85% first call resolution (FCR). These metrics aim to support rapid order processing in a competitive market where same-day delivery is expected.

Ambiguous SLA scopes led to disputes when peak volumes exceeded defined exceptions, causing unfulfilled orders and fees from wire services. Static SLAs failed to adapt to changing customer needs, like complex customization requests, resulting in compliance gaps and fines for abandoned calls. Rigid AHT targets pressured agents to rush calls, dropping FCR and increasing repeat inquiries despite meeting speed metrics—a "watermelon SLA" effect where numbers looked good but service suffered. Unrealistic targets during high-shrinkage periods caused agent burnout and 30% attrition, amplifying data security risks from high turnover. Lost revenue hit R150,000 from penalties and refunds, eroding trust in Mamelodi's local market. To mitigate, Amelias revised SLAs with clear exceptions, real-time tracking, and balanced metrics prioritizing quality over speed.

1.2 As the manager for Amelias Florist, identify the risks they face as well as corrective measures to address deviations from planned targets. (8 marks)

The learner can list any of the possible answers listed below and assessors discretion applies for all relevant answers

Model answers

As the manager of Amelia's Florist call center in Mamelodi, I've identified key risks tied to our SLAs (e.g., 80/20 answer time, 90% first-call resolution) and operational targets (daily quotas, 95% on-time deliveries), along with targeted corrective measures.

Identified Risks (4 marks)

Performance Deviations from Targets: Rushed calls during peaks breach resolution rates (70% vs. 90%), increasing callbacks by 25% and customer dissatisfaction.

External Disruptions: Power outages (load-shedding) halt operations, missing answer times and delivery SLAs, risking 15% cancellations.

Agent Burnout and Turnover: Sales pressure conflicts with service focus, causing 30% staff churn and inconsistent quality.

Financial and Contractual Penalties: SLA breaches trigger 5% vendor fines, straining our R2M budget and threatening partnerships.

Corrective Measures (4 marks)

Proactive Monitoring and Alerts: Implement real-time dashboards for early warnings (e.g., queue >20 calls), enabling supervisor intervention before breaches.

Contingency Planning: Add SLA exclusions for outages/peaks; deploy backup generators and flexible volume bands (e.g., +15% threshold).

Agent Training and Incentives: Conduct regular upskilling on balanced service/sales; introduce rewards for resolution targets to cut turnover.

Root Cause Reviews and Remedies: Hold weekly audits with corrective action plans (CAPA); apply proportional credits and renegotiate rigid clauses quarterly.

The learner can list any of the possible answers listed below and assessors discretion applies for all relevant answers

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

1.3. Garnakus Ltd, a mid-sized logistics firm in Harare, Zimbabwe, outsources its customer contact centre operations to Crixus Software, a specialist provider of cloud-based call handling platforms. The SLA, signed in January 2025, defines key deliverables for 24/7 support across inbound queries, order tracking, and complaints, serving 500 daily interactions.

SLA Deliverables and Targets

Metric	SLA Target	Purpose
Answer Service Level (ASL)	80% within 20 seconds	Ensure quick response
Average Handle Time (AHT)	≤ 300 seconds	Efficient call resolution
First Contact Resolution (FCR)	≥ 85%	Minimize repeat calls
Abandonment Rate (ABR)	≤ 5%	Reduce customer frustration
Uptime/Availability	99.5%	System reliability

Current Performance Statistics (Q1 2026)

Monthly averages from Crixus dashboard (Jan-Mar 2026), during peak logistics season:

Metric	Jan	Feb	Mar	Variance from Target
ASL (%)	72%	68%	75%	-5% to -12%
AHT (sec)	345	380	320	+20 to +80 sec
FCR (%)	78%	72%	81%	-4% to -13%
ABR (%)	8%	12%	7%	+2% to +7%
Uptime (%)	98.2	97.5	99.0	-0.5% to -2%

1.3. You are required to identify service delivery gaps, and document practicable, cost-effective recommendations to address identified gaps (6 marks).

Model Answer

The assessor can accept any of the answers listed below as well as any other reasonable answer

Identified Gaps (3 marks)

- Answer Service Level (ASL): Actual 68-75% vs. 80% target; gap of 5-12% signals severe staffing shortages during 40% Feb peaks, causing delays.
- Average Handle Time (AHT) & First Contact Resolution (FCR): AHT exceeds by 20-80 seconds (320-380s vs. ≤300s); FCR lags 4-13% (72-81% vs. ≥85%), indicating rushed or untrained handling leading to repeats.
- Abandonment Rate (ABR) & Uptime: ABR hits 7-12% vs. ≤5%; uptime dips to 97.5-98.2% vs. 99.5%, reflecting queue overloads and system unreliability.

Cost-Effective Recommendations (3 marks)

- Forecasting & Staffing Boost: Implement free/open-source tools for 90-day volume predictions; hire 5 temps seasonally at R15k/month total (vs. R150k Q1 penalties).
- Agent Training Blitz: 2-hour weekly sessions on quick resolutions (target 10% FCR lift); use existing call recordings—no external cost.
- Tech Quick-Fixes: Add IVR auto-routing for 30% queries and queue callbacks; negotiate Crixus uptime credits to offset upgrades under R50k.

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

1.4. As a Contact Centre Manager your role includes operational and strategic planning. You are required to answer the following questions:

1.4.1 A contact centre has a strategic objective to increase customer retention by 10% in the next 12 months. Which operational target best aligns with this strategy? (1)

- A. Increase the number of outbound sales calls per agent by 30% in three months
- B. Reduce average handling time (AHT) by 25% within one month, regardless of call outcomes
- C. Achieve a first-contact resolution (FCR) rate of 80% within six months for priority customer segments

D. Reduce staffing costs by 15% over the next quarter by cutting evening shifts

1.4.2 The strategic plan calls for differentiating the contact centre through personalised service. Which scheduling decision best supports this strategic direction? (1)

A. Schedule fewer quality monitoring sessions to free more time for answering calls

B. Schedule agents strictly based on lowest hourly wage to minimise total labour cost

C. Group agents by skill and customer segment, and schedule them to ensure coverage of high-value segments during peak hours

D. Use a single, generalist agent pool and assign them randomly to calls throughout the day

1.4.3 You are creating a monthly operational plan for a contact centre. Which element best demonstrates alignment with both the strategic plan and daily operations? (1)

A. A set of measurable service-level and quality targets, mapped to strategic goals, with weekly reporting and review mechanisms

B. A detailed schedule of breaks and lunches only, ensuring legal compliance

C. A list of all customer complaints received last month without any related actions

D. A summary of the organisation's mission statement copied into the plan without specific actions

1.4.4 Forecasts show a 20% increase in call volume over the next quarter due to a planned marketing campaign. Which action best applies strategic and operational planning concepts to prepare the contact centre? (1)

A. Ignore the forecast and adjust only after the campaign starts to avoid overstaffing

B. Ask agents to work harder during the campaign without changes to staffing or scheduling

C. Develop a workforce plan that increases staff and cross-trains agents in advance, based on forecasted demand patterns

D. Stop all non-essential training immediately to maximise time on calls during the campaign

1.4.5 Senior leaders have set a strategic goal to shift 30% of simple enquiries from phone to digital self-service within 18 months. Which operational target in the contact centre most directly supports this goal? (1)

- A. Maintain current call scripts without promoting digital channels to avoid confusing customers
- B. Reduce after-call work (ACW) time by 40% for all call types
- C. Set a target that 70% of eligible calls include an explanation and demonstration of available digital self-service options
- D. Increase call transfer rates so more calls reach specialised teams

1.4.6 During quarterly review, you find that the contact centre consistently meets its service level target but misses its customer satisfaction (CSAT) target. What is the most appropriate planning response? (1)

- A. Maintain current schedules but add an aggressive AHT reduction target to further improve efficiency
- B. Review and adjust quality standards, coaching plans, and agent objectives to place more emphasis on interaction quality and problem resolution
- C. Lower the CSAT target so performance appears aligned with service levels
- D. Remove service level targets entirely and focus only on CSAT

1.4.7 Which of the following best illustrates cascading strategic objectives into team-level operational plans in a contact centre? (1)

- A. Team leaders allow each agent to choose their own personal goals without reference to organisational priorities
- B. The organisation defines a strategic goal for customer loyalty, and team plans translate this into specific targets for first-contact resolution, CSAT, and proactive follow-up actions
- C. The CEO sets a high-level customer experience goal, but team leaders continue to use only historical AHT as their primary team KPI
- D. Supervisors focus only on individual attendance issues, with no connection to broader strategic outcomes

1.4.8 A contact centre strategy emphasises building long-term relationships with customers rather than maximising short-term sales. Which operational planning decision is most aligned with this strategy? (1)

- A. Reduce handling times by limiting how long agents can talk to customers about non-transactional topics
- B. Introduce an incentive scheme that rewards agents purely based on the number of sales per day
- C. Ban agents from discussing future needs with customers to keep calls focused on the current sale
- D. Set balanced scorecards for agents that weight customer satisfaction, retention indicators, and compliant sales behaviours more heavily than raw sales volume

Question number	Answer
1.4.1	C
1.4.2	C
1.4.3	A
1.4.4	C
1.4.5	C
1.4.6	B
1.4.7	B
1.4.8	D

SUB- TOTAL: 32 marks

QUESTION 2

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

All Life has a vacancy for an outbound contact centre agent in their Klerksdorp office. As their Contact Centre Manager, the Human Resources Department requests for a job description which they can use in their recruitment and selection effort.

2.1 You are required to prepare a job description for an outbound call centre agent. (6 marks)

Model answers

The learner must present a job description format which includes any of the following items below. **NB Assessors discretion applies.**

Job title Outbound Contact Centre Agent – Klerksdorp Office (1 mark)

Reporting line

Reports to: Contact Centre Manager (1 mark)

Purpose of the role (1 mark)

To proactively contact existing and potential clients via telephone to provide information, support sales/retention campaigns, and deliver high quality customer service in line with All Life's standards.

Key responsibilities (1 mark)

- Make professional outbound calls to customers and prospects according to defined scripts and campaign guidelines.
- Accurately explain products, services, and policy information to clients, ensuring full compliance with regulatory and company requirements.
- Record and update all call outcomes, customer details, and account information in the CRM/contact centre system.
- Achieve agreed performance targets for call volume, conversions (e.g., sales, renewals, or collections), and customer satisfaction.
- Identify customer needs, objections, and escalations, clearly documenting and referring complex issues to the appropriate team or supervisor.
- Maintain a professional, courteous, and empathetic telephone manner at all times to enhance All Life's brand image and customer loyalty.

Minimum qualifications and requirements (1 mark)

- Grade 12 (Matric) or equivalent qualification.

- Basic computer literacy and proficiency in using a CRM or call centre system.
 - Good command of English (spoken and written); additional South African languages are an advantage.
 - At least 6–12 months' experience in a call/contact centre environment (outbound experience preferred).
- Strong interpersonal skills, ability to work under pressure, and commitment to meeting targets.

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

2.2. As the manager of a call centre your duties sometimes extend to conflict management as well as dispute resolution

2.2.1 What is the purpose of the Labour Relations Act (1 mark)

The purpose of the Labour Relations Act is to promote fair labour practices and regulate the relationship between employers and employees, including the resolution of workplace disputes.

2.2.2 The abbreviation CCMA in labour law means (1 mark)

CCMA stands for **Commission for Conciliation, Mediation and Arbitration**.

2.2.3 Define the term substantive fairness and give an example (2 marks)

Substantive fairness is the requirement under South Africa's Labour Relations Act that a dismissal must have a valid, fair reason—such as misconduct, incapacity, or operational requirements—supported by evidence, regardless of the process followed. **1 mark**

Example: Dismissing an employee for repeated absenteeism only after proving awareness of the policy, consistent application to others, and that no lesser sanction suffices. **1 mark**

2.2.4 Define the term procedural fairness and give an example (2 marks)

Possible response

In labour law, procedural fairness means that the process an employer follows before dismissing or disciplining an employee must be fair, transparent, and in line with the law (1 mark)

Assessor discretion applies and a mark should be allocated for an appropriate example

An example is when an employee is charged with misconduct and the employer: gives the employee written notice of the allegations, allows adequate time to prepare, holds a proper disciplinary hearing where the employee can respond and call witnesses, and then informs the employee of the decision in writing with reasons before any dismissal is implemented. (1 mark)

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

As the Contact Centre Manager Halle Berry Cosmetics based in Koster you are asked to participate in a brainstorming session with Human Resources on employee performance.

2.3 List 4 factors that impact on performance and explain how each one affects the achievement of operational targets in a contact centre environment (8 marks)

Model Answer

May include any or more of the following

Assessors' discretion applies 1 mark for factor and 1 mark for explanation

Training and Development

Ongoing training builds skills in communication, product knowledge, and handling queries, essential for high first call resolution (FCR) rates. Inadequate training increases average handle time (AHT) and error rates, missing service level (SL) targets like 80% calls answered in 20 seconds. Effective programs boost FCR to 70%+, enhancing productivity and customer satisfaction (CSAT).

Motivation and Recognition

Recognition through feedback, incentives, and fair pay sustains morale amid repetitive, high-stress calls. Low motivation leads to burnout, absenteeism, and turnover (often 30-50%), disrupting staffing ratios and occupancy targets. Strong systems improve engagement, reducing attrition and supporting consistent CSAT and SL achievement.

Workload Management

Balanced schedules and realistic targets prevent overload from peak volumes, maintaining focus on quality interactions. Excessive workload raises abandonment rates and AHT, failing operational goals like speed of answer (ASA). Proper management optimizes occupancy (80-85%), minimizing queues and boosting overall efficiency.

Technology and Tools

Real-time coaching tools, CRM access, and automation aid quick resolutions and reduce manual tasks. Poor tools frustrate agents, lowering FCR and increasing CSAT complaints. Advanced tech cuts AHT by 10-20% and elevates performance on KPIs like resolution rates.

2.4. Define coaching and mentoring and explain how they affect performance in a call centre (10 marks)

Model Answer

May include any or more of the following
Assessors' discretion applies

Coaching 2 marks for definition

Coaching focuses on immediate performance gaps, using techniques such as real-time monitoring, post-call analysis, and actionable feedback to refine skills like objection handling or scripting adherence. It employs models like GROW (Goals, Reality, Options, Will) for sessions, ensuring compliance with quality standards. This direct intervention targets metrics like average handle time (AHT) and first call resolution (FCR).

Mentoring 2 marks for definition

Mentoring builds enduring partnerships, often via buddy systems, where mentors share tacit knowledge, resilience strategies, and long-term career paths beyond daily tasks. It emphasizes trust, regular check-ins, and personal growth, differing from coaching by being less directive and more advisory. Programs pair new hires with veterans to accelerate cultural integration.

Effects on Call Centre Performance

Coaching (3 marks for any 3 effects identified)
boosts productivity by 11-21e%,
slashing AHT by up to 20%

and lifting FCR through precise skill honing, which sustains service levels (e.g., 80/20) and reduces escalations.

Mentoring (3 marks for any 3 effects identified)

cuts turnover by 50%+, enhances engagement, and fosters leadership, stabilizing occupancy and CSAT amid burnout risks. Combined, they shorten ramp-up times, lower training costs, and align individual efforts with operational KPIs like queue management and customer loyalty.

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

Meleric Financial Services operates a call centre in Midrand, South Africa, handling inbound customer queries for financial products like loans, insurance, and investments. In 2023, the centre managed seasonal peaks, especially in Q4 due to year-end financial planning, requiring a detailed workforce plan to maintain service levels at 80% while controlling costs.

The Midrand facility employs around 120 full-time equivalents (FTEs) on average, focusing on customer service for financial services clients. Key factors included 35% shrinkage from absenteeism, training, and breaks, average handle time of 5 minutes per call, and 85% target occupancy.

Key Assumptions

- 22 working days per month, 8 hours per agent daily.
- Forecasted call volumes based on historical trends and marketing campaigns.
- Plan aims to balance staffing with demand to avoid overtime.

2023 Workforce Plan

The plan forecasts monthly FTE needs after applying shrinkage and occupancy adjustments.

Month	Call Volume	Workload Hours	Required FTE
Jan	120000	10000	103

Month	Call Volume	Workload Hours	Required FTE
Feb	115000	9583	99
Mar	125000	10417	107
Apr	118000	9833	101
May	122000	10167	105
Jun	130000	10833	111
Jul	135000	11250	116
Aug	132000	11000	113
Sep	128000	10667	110
Oct	140000	11667	120
Nov	150000	12500	129
Dec	145000	12083	124

2.5 As the contact centre manager for MFS how would you align staffing requirements with operational demands. (6 marks)

As the contact centre manager for Meleric Financial Services (MFS) in Midrand, I would align staffing with operational demands through data-driven forecasting, flexible scheduling, and continuous monitoring to meet service levels while optimizing costs. This ensures adequate coverage for peaks like November's 150,000 calls requiring 129 FTEs.

Forecasting Demand

Use historical data and Erlang C models to predict call volumes, AHT, and arrivals per interval. Incorporate seasonality (e.g., Q4 peaks) and external factors like marketing campaigns via tools like NICE or Verint WFM.

Calculating Requirements

Apply formulas: $FTE = (\text{call volume} \times \text{AHT} / 3600) / (\text{occupancy} \times \text{work hours per period})$, adjusted for 35% shrinkage. From the 2023 plan, this yields interval-level schedules, e.g., hiring 20 extra for Oct-Dec.

Scheduling Strategies

Build shift patterns (e.g., 8-hour shifts with 30-min intervals) using optimization software.

Mix full-time, part-time, and temps for flexibility; cross-train agents for multi-skills.

Offer incentives for overtime/volunteering during peaks.

Monitoring and Adjustments

Track real-time metrics (ASA, abandonment <5%) via dashboards; adjust intraday with overtime or callbacks. Monthly reviews refine forecasts, reducing overstaffing by 10-15%.

SUB- TOTAL: 36 marks

QUESTION 3

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

The South African Bureau of Standards (SABS) is the national institution responsible for developing, promoting, and maintaining South African National Standards (SANS), providing certification, testing, and inspection services to ensure product quality and safety. Founded in 1945, it plays a key role in supporting local industry and regulating standards for imports.

Key Functions and Services of SABS:

Standards Development: Creates and publishes SANS, which cover various industries, including technical regulations and performance requirements.

Certification: Offers the "SABS Mark of Approval" for products, indicating they meet strict safety and quality standards.

Testing and Inspection: Provides laboratories to test products against national and international standards.

Management Systems: Certifies company management systems, such as ISO 9001 (Quality) and SANS 13485 (Medical Devices).

3.1 Describe the scope, purpose and structure of the South African Bureau of Standards. (6 marks)

Model answer

Assessor discretion applies 2 for purpose, 2 marks for scope and 2 marks for structure

The South African Bureau of Standards (SABS) is a statutory body established under the Standards Act 24 of 1945 and operating under Act 8 of 2008. Its purpose is to promote and maintain standardization and quality for commodities, products, and services in South Africa by developing, issuing, and managing South African National Standards (SANS), while providing conformity assessment, testing, certification, inspection, and related services to ensure safety, reliability, and international trade compliance.

The scope covers the national standardization needs of South Africa, including standards development, reference materials, product certification (e.g., SABS Mark of Approval), and representation in international bodies like ISO, IEC, and SADCSTAN.

The structure features a reorganized entity separating standards development from commercial activities (testing, certification) for impartiality, governed as an autonomous Schedule 3A public entity under the Department of Trade, Industry and Competition, with core divisions for standards, certification, and services.

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

As a contact centre management intern for Qwaqwa based NDS Debt Collectors call centre your supervisor asks you to benchmark your operations against those of Debtsure a key player in your industry.

3.2 Define the term benchmarking and describe and explain any 3 types of benchmarking you are familiar with. (8 marks)

Benchmarking 2 marks

is the systematic process of comparing an organization's operations, performance metrics, processes, or practices against those of competitors, industry leaders, or internal standards to identify gaps, best practices, and opportunities for improvement. For NDS Debt Collectors in Qwaqwa, benchmarking against Debtsure would involve metrics like collection rates, average days delinquent, first call resolution (FCR), and cost per collection to enhance efficiency in debt recovery.

You can choose any 3 types from the following (3x2)

Internal Benchmarking

Internal benchmarking compares performance across different teams, shifts, or periods within the same organization, such as NDS's Qwaqwa call centre agents versus its Johannesburg branch. This identifies high-performing internal practices, like superior FCR on morning shifts, for replication, fostering consistency without external data risks.

Competitive Benchmarking

Competitive benchmarking directly measures NDS against key rivals like Debtsure using public KPIs (e.g., debt recovery rates or agent productivity). It reveals market position—for instance, if Debtsure achieves 85% collection effectiveness while NDS lags at 75%—prompting targeted strategies like script optimization.

Functional Benchmarking

Functional benchmarking evaluates specific processes against unrelated industry leaders excelling in that area, e.g., NDS studying a telecom call centre's handle time reduction techniques despite Debtsure's direct competition. This cross-industry approach adopts innovative methods, like AI routing, adaptable to debt collection for faster resolutions.

- **Process Benchmarking:** Demonstrate how top performing companies accomplish the specific process in question. Such benchmarking is collected via research, surveys/interviews, and site visits. By identifying how others perform the same functional task or objective, people gain insight and ideas they may not otherwise achieve. Such information affirms and supports decision-making by executives.

- **Performance Metrics:** "Performance metrics" give numerical standard against which a client's own processes can be compared. These metrics are usually determined via a detailed and carefully analysed survey or interviews. Clients can then identify performance gaps, prioritize action items, and then conduct follow-on studies to determine methods of improvement.

- **Strategic Benchmarking:**

Identify the fundamental lessons and winning strategies that have enabled high performing companies to be successful in their marketplaces. Strategic benchmarking examines how companies compete and is ideal for corporations with a long-term perspective.

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

Peoples Bank operates a multichannel contact centre in Pretoria handling inbound calls, WhatsApp enquiries, and online-chat queries. The bank has recently introduced a new Quality Assurance (QA) framework to improve consistency in customer-service ratings ahead of an upcoming external audit.

Background

Peoples Bank implemented a formal call-calibration program after external auditors highlighted inconsistencies in QA scores between team leads and quality analysts. The bank's QA team now uses several calibration methodologies to ensure that monitoring scores are fair, repeatable, and aligned with the bank's service standards.

All agents and supervisors are monitored against a QA scorecard with criteria such as:

Greeting and identification

Compliance and security (e.g., ID verification)

First-contact resolution

Empathy and brand tone

Accurate documentation

The Centre Manager has shared the following information about four different calibration approaches currently used:

Methodology 1: Traditional Panel Calibration

Description:

Each month, the Quality Manager selects 10–15 calls (mix of good, average, and poor) and invites two team leads, one quality analyst, and the Operations Manager to a calibration session.

All participants listen to the same call recording.

Each rates the call independently using the same scorecard.

After everyone submits scores, the group discusses discrepancies and agrees on a final benchmark score for that call.

Example:

Call 1: A complaint about a blocked debit card.

Quality Analyst: 82/100

Team Lead A: 76/100

Team Lead B: 85/100

Consensus score agreed: 81/100, with notes on where the agent should have probed the issue further.

Key features:

Focus on alignment between QA and supervisors.

Helps standardise how “medium” or “poor” performances are interpreted across raters.

Methodology 2: Agent-Led 360-Degree Calibration

Description:

Peoples Bank runs bi-monthly “360-degree” sessions where the person being rated is invited to the table.

A recorded call from the agent is selected.

The agent self-rates the call first, then the team lead and quality analyst rate it.

All three scores are discussed, focusing on:

What the agent did well.

Where they missed standards.

How the scorecard criteria apply in real calls.

Example:**Call 2: A customer applying for a personal loan.**

Agent self-score: 78/100 (believes they explained terms clearly).

Team lead: 70/100 (missed full disclosure about fees).

QA analyst: 68/100 (also notes inadequate ID verification).

Discussion: Group agrees on 69/100, and the agent accepts coaching on fee disclosure and verification.

Key features:

Builds transparency and trust in the QA process.

Turns calibration into a development (coaching) session, not just a scoring exercise.

Methodology 3: Sample-Based Multi-Channel Calibration

Description:

Peoples Bank deals with calls, WhatsApp messages, and live-chat. The QA team periodically runs multi-channel calibration sessions.

A small sample is chosen (e.g., 3 phone calls, 2 WhatsApp threads, 2 chats).

All evaluators score each interaction type using channel-specific scorecards mapped to the same core standards (e.g., “compliance”, “empathy”, “resolution”).

The group then compares:

How strictly the same standard is applied across channels. Where wording in the scorecard needs adjusting for clarity.

Example:

Call 3: A phone call about a missed payment.

WhatsApp 1: The same customer later messages asking for proof of payment.

Group discussion:

Evaluators realise that “tone and empathy” is rated much more strictly on phone than on WhatsApp because tones are not visible.

They agree to add clearer guidance: “On digital channels, use positive language and clear next steps to compensate for lack of voice tone.”

Key features:

Ensures consistent standards across channels (phone, chat, WhatsApp).

Helps refine QA scorecards so wording is channel-neutral where possible.

Methodology 4: AI-Supported Calibration (Automated Sampling)

Description:

Peoples Bank has started using an AI-assisted QA tool to support calibration.

The system automatically tags calls (e.g., “complaint”, “fraud-check”, “upsell”) and selects a balanced calibration sample (e.g., 5 high-risk, 5 easy, 5 borderline).

Evaluators review the AI-flagged calls and compare:

Their human score.

The AI-generated risk/compliance score.

The group then adjusts QA criteria or AI rules where human and AI scores consistently differ.

Example:

Call 4: A transfer request flagged by AI as high-risk because of urgency and multiple account questions.

Quality analyst: 74/100 (agent followed security steps but was slightly abrupt).

AI score: 65/100 (low on empathy metrics).

Calibration discussion: Group agrees an empathy-based sub-criterion should be added to the scorecard for high-risk calls.

Key features:

Improves sample representativeness and reduces bias in call selection.

Helps the centre move toward data-driven, continuous calibration instead of only monthly sessions.

3.3 You are required to make recommendations on how the call calibration can improve output service delivery quality in a contact centre. (10 marks)

1. Hold regular calibration sessions

Run monthly calibration sessions (e.g., 1–2 hours per team) so all evaluators (QA analysts, team leads, trainers) stay aligned on how to apply the scorecard. This reduces rating bias and ensures fair, consistent feedback to agents, which directly improves service quality over time.

2. Include agents in calibration (360-degree)

Invite agents to rate their own calls and compare their scores with supervisors and QA. This increases transparency, builds ownership of quality standards, and helps agents understand how their behaviour affects customer experience.

3. Use a balanced sample of calls

Select recordings that cover different types of interactions (easy, difficult, complaints, high-risk transactions) so calibration reflects real-world scenarios. This ensures that QA standards are robust and applicable to all customer journeys, not just “perfect” calls.

4. Sharper, behaviour-based scorecard criteria

Refine the QA scorecard so every item describes observable behaviour (e.g., “confirmed ID verbally” instead of “was professional”). Clear criteria reduce subjectivity in calibration, leading to more accurate scores and more precise coaching.

5. Turn calibration into coaching sessions

After agreeing on scores and gaps, the facilitator should summarise key improvement points and link them to specific coaching actions (e.g., “re-train on probing questions” or “practice

empathy phrases”). This ensures that calibration directly improves agent behaviour and service-delivery outcomes.

6. Set and monitor scoring variances

Agree a target variance (e.g., ≤5–10% difference between raters) and track how often scores fall outside it. When variance is high, revisit scorecard wording or training, which raises the overall reliability of QA and, therefore, the accuracy of service-quality insights.

7. Link calibration findings to training content

Use patterns from calibration (e.g., repeated failures in compliance or empathy) to update onboarding and refresher training modules. Training that is based on real calibration data directly targets weak areas and improves first-contact resolution and CSAT.

8. Calibrate across channels (phone, chat, email, WhatsApp)

Include digital interactions in calibration so the same standards are applied to voice and text-based channels. This ensures a consistent customer experience and helps agents adapt tone and clarity to each channel's constraints.

9. Use calibration to refine policies and scripts

If calibration repeatedly shows that agents struggle with a specific process (e.g., fraud checks or fee disclosures), revise the SOPs, hold-scripts, or FAQs accordingly. Fewer errors and clearer guidance improve compliance and reduce escalations, which boosts service-delivery quality.

10. Embed calibration in a continuous-improvement loop

Publish calibration outcomes (anonymised) and share trends with managers so they can track changes in quality metrics over time. When calibration is linked to KPIs (FCR, CSAT, compliance), it becomes a continuous-improvement tool that systematically raises

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

Loxion Kulcha Call Centre – Soshanguve Unit

Audit Period: 1–15 March 2026

Date of Report: 22 March 2026

Audit Type: Internal Quality Assurance (QMS / Service Standards)

1. Introduction and audit objectives

This internal quality audit was conducted to evaluate the compliance, efficiency, and service quality standards of the Loxion Kulcha call centre operations in Soshanguve against the company's customer service policy, SLA commitments, and internal quality management procedures.

The objectives were:

- Assess adherence to call handling scripts, brand tone, and escalation procedures.
- Measure compliance with data privacy and security protocols.
- Identify strengths and improvement areas in agent performance and process controls.

2. Scope and methodology

The audit covered the following areas:

- Inbound customer service calls (complaints, inquiries, order support).
- Call handling practices (greeting, probing, resolution, closing).
- Use of CRM and ticketing systems.
- Shift supervisor quality monitoring and coaching.
- Adherence to call quality scorecards and KPIs (AHT, FCR, CSAT).

Methodology:

- Random sampling of 100 recorded calls over the audit period.
- On site observation of 2 shifts and 4 team leads.
- Review of 10 completed quality monitoring scorecards and 5 coaching logs.

3. Summary of key findings

3.1 Overall compliance rating

Category	Compliance level	Notes
Call-handling process	85%	Good adherence to greeting and closing standards; some gaps in probing and escalation.
Brand tone and language	90%	Agents consistently reflect Loxion Kulcha's "urban African" brand voice.
Data privacy and security	80%	Basic compliance; some agents shared minimal but unnecessary details on screen.
First-contact resolution	72%	FCR below target; multiple transfers and repeat calls noted.
Escalation and documentation	70%	Escalations not always logged with clear actions and timeframes.

3.2 Positive observations

- Agents demonstrated strong customer empathy and patience, especially on complaints and returns.
- Majority of calls opened and closed with the correct standard greeting and closing statements.
- Supervisors are actively monitoring calls and providing basic feedback, typically within 24 hours.

3.3 Non-conformances and areas for improvement

Major and minor findings included:

- Incomplete probing: 18% of sampled calls showed agents jumping to solutions without confirming the full issue, leading to repeat calls.
- Weak escalation logging: 25% of escalated tickets lacked clear ownership, timelines, or follow up notes.
- Privacy awareness: In 12% of calls, agents were observed verbally reading or confirming sensitive information (e.g., full ID numbers) without clear need.
- Inconsistent use of CRM: 30% of calls had missing or incomplete notes, reducing traceability and audit trail quality.

4. Risk assessment

- High risk: Weak escalation logging and inconsistent probing may lead to customer dissatisfaction and reputational impact for the Loxion Kulcha brand.
- Medium risk: Data privacy gaps expose the call centre to potential information security incidents if not corrected.
- Low risk: Minor gaps in CRM usage mainly affect internal reporting and coaching, not immediate service delivery.

3.4 As the Contact Centre Manager for Loxion Kulcha make recommendations to ensure the company is ready for external audits (8 marks)

Model answer

Learner can choose any 1 of the following

1 mark for recommendation and 1 mark for explanation (4x2)

1. Align processes with audit standards

- Identify which standards will be used (e.g., ISO related quality, customer service or data privacy frameworks) and map all contact centre processes (calls, emails, web chats) to these requirements.
- Document standard operating procedures (SOPs) for call handling, escalations, complaints, data privacy, and QA, and ensure they are up to date and signed off.

2. Strengthen internal quality management

- Run regular internal quality audits (monthly or quarterly) using a formal scorecard, and close any findings with clear corrective action plans and evidence.
- Ensure all agents and supervisors are trained on QA standards, KPIs, and how their interactions will be assessed during an external audit.

3. Improve documentation and records

- Maintain complete, accurate records for call recordings, QA evaluations, coaching logs, training attendance, and incident/complaint files for the required retention period.
- Organise electronic folders and access permissions so auditors can easily and securely retrieve evidence without disruption to operations.

4. Enhance data privacy and compliance controls

- Implement clear data handling rules (e.g., no sharing of full ID numbers, screen locking, access level controls) and train staff on these policies.
- Conduct periodic checks to confirm that personal information is captured, stored, and disposed of in line with privacy regulations likely to be audited.

5. Prepare staff and conduct readiness drills

- Brief all agents and team leads on the purpose of the external audit, likely questions, and how to behave and communicate with auditors.
- Run a mock external audit (full day practice) including a walkthrough, record checks, and interviews to identify gaps and build confidence.

6. Maintain open communication with auditors

- Appoint a dedicated audit liaison (e.g., Quality Manager or Operations Manager) to coordinate with external auditors, schedule sessions, and track requests.
- Ensure responses to auditor queries are timely, factual, and supported by documented evidence to avoid delays or negative findings.

7. Monitor and continuously improve

- Use performance analytics and QA data to identify systemic issues (e.g., recurring non compliance, escalation failures) and implement long term process improvements.
- Regularly review audit related KPIs (e.g., compliance percentage, incident rate trends) and report progress to management to demonstrate a culture of continuous improvement, which auditors favour.

By implementing these steps, Loxion Kulcha's call centre will present a structured, compliant, and well prepared environment that meets external audit expectations and supports a positive audit outcome.

SUB- TOTAL: 32 marks

GRAND TOTAL: 100 Marks