

QUALIFICATIONS PACK - OCCUPATIONAL STANDARDS FOR IT-ITeS INDUSTRY

**What are**

**Occupational**

**Standards(OS)?**

* OS describe what individuals need to do, know and understand in order to carry out a particular job role or function
* OS are performance standards that individuals must achieve when carrying out functions in the workplace, together with specifications of the underpinning knowledge and understanding

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**Introduction**

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**Q****ualifications Pack- CRM Domestic Non-Voice**

**Sector: Information technology- INFORMATION TECHNOLOGY enabled SERVICES (IT-ITeS)ces Helpdesk Attendant**

**Sector:** IT-ITeS

**SUB-SECTOR:** Business Process Management

**OCCUPATION:** Customer Relationship Management

**REFERENCE ID:**SSC/Q2211

**Domestic Non- Voice** inthe IT-ITeS Industry is also known as a Customer Service Associate, Customer Service Representative, Customer Care Executive, Customer Service Advisor, Helpdesk Coordinator, Customer Support Representative, Support Engineer, Support Consultant, Process Associate- Transaction etc.

**Brief Job Description:** Individuals at this job are responsible for resolving queries and customer cases over web-chat or email. They form the primary layer of contact with the customer and responses may be made on either preexisting email templates or customized mails to the query requirement.

**Personal Attributes:** This job requires the individual to either work independently or collaboratively in teams to resolve customer queries effectively. The individual should possess excellent communication skills and should be willing to take up a desk-based job with long hours.

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| **Job Role** | **CRM Domestic Non-Voice** (Customer Service Associate, Customer Service Representative, Customer Care Executive, Process Associate- Transaction) |
| **Role Description** | Individuals at this job are responsible for resolving queries and customer cases over web-chat or email. |
| **NVEQF/NVQF level**  **Minimum Educational Qualifications**  **Maximum Educational Qualifications** | 4 |
| 10th  Master's Degree in any discipline |
| **Training**  (Suggested but not mandatory) | Training programs in customer orientation, dealing with difficult customers, written communication etc. |
| **Experience** | 0-1 years of work experience/internship in customer service roles |
| **Applicable National Occupational Standards (NOS)** | **Compulsory:**   1. [SSC/N3021 (Deal remotely with customer queries)](#NOS4) 2. [SSC/N9001 (Manage your work to meet requirements)](#ssc1) 3. [SSC/N9003 (Maintain a healthy, safe and secure working environment)](#ssc4)   **Optional:**  Not Applicable |
| **Performance Criteria** | As described in the relevant OS units |

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| --- | --- | --- | --- | --- |
| Job Details | **Qualifications Pack Code** | **SSC/Q2211** | | |
| **Job Role** | **Domestic Non- Voice** | | |
| **Credits(NVEQF/NVQF/NSQF)** | **TBD** | **Version number** | **0.1** |
| **Sector** | **IT-ITeS** | **Drafted on** | **30/04/13** |
| **Sub-sector** | **Business Process Management** | **Last reviewed on** | **30/04/13** |
| **Occupation** | **Customer Relationship Management** | **Next review date** | **30/06/14** |

# Glossary of Key Terms

**Table 1: Glossary of Key Terms**

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| --- | --- | --- |
| Definitions | **Keywords /Terms** | **Description** |
| Sector | Sector is a conglomeration of different business operations having similar businesses and interests. It may also be defined as a distinct subset of the economy whose components share similar characteristics and interests. |
| Sub-sector | Sub-sector is derived from a further breakdown based on the characteristics and interests of its components. |
| Vertical | Vertical may exist within a sub-sector representing different domain areas or the client industries served by the industry. |
| Occupation | Occupation is a set of job roles, which perform similar/related set of functions in an industry. |
| Function | Function is an activity necessary for achieving the key purpose of the sector, occupation, or area of work, which can be carried out by a person or a group of persons. Functions are identified through functional analysis and form the basis of OS. |
| Sub-functions | Sub-functions are sub-activities essential to fulfill the achieving the objectives of the function. |
| Job role | Job role defines a unique set of functions that together form a unique employment opportunity in an organisation. |
| Occupational Standards (OS) | OS specify the standards of performance an individual must achieve when carrying out a function in the workplace, together with the knowledge and understanding they need to meet that standard consistently. Occupational Standards are applicable both in the Indian and global contexts. |
| Performance Criteria | Performance Criteria are statements that together specify the standard of performance required when carrying out a task. |
| National Occupational Standards (NOS) | NOS are Occupational Standards which apply uniquely in the Indian context. |
| Qualifications Pack Code | Qualifications Pack Code is a unique reference code that identifies a qualifications pack. |
| Qualifications Pack(QP) | Qualifications Pack comprises the set of OS, together with the educational, training and other criteria required to perform a job role. A Qualifications Pack is assigned a unique qualification pack code. |
| Unit Code | Unit Code is a unique identifier for an OS unit, which can be denoted with either an ‘**O**’ or an ‘**N**’. |
| Unit Title | Unit Title gives a clear overall statement about what the incumbent should be able to do. |
| Description | Description gives a short summary of the unit content. This would be helpful to anyone searching on a database to verify that this is the appropriate OS they are looking for. |
| Scope | Scope is the set of statements specifying the range of variables that an individual may have to deal with in carrying out the function which have a critical impact on the quality of performance required. |
| Knowledge and Understanding | Knowledge and Understanding are statements which together specify the technical, generic, professional and organisational specific knowledge that an individual needs in order to perform to the required standard. |
| Organisational Context | Organisational Context includes the way the organisation is structured and how it operates, including the extent of operative knowledge managers have of their relevant areas of responsibility. |
| Technical Knowledge | Technical Knowledge is the specific knowledge needed to accomplish specific designated responsibilities. |
| Core Skills/Generic Skills | Core Skills or Generic Skills are a group of skills that are key to learning and working in today's world. These skills are typically needed in any work environment. In the context of the OS, these include communication related skills that are applicable to most job roles. |
| Helpdesk | Helpdesk is an entity to which the customers will report their IT problems. IT Service Helpdesk Attendant is responsible for managing the helpdesk. |
| **Acronyms** | **Keywords /Terms** | **Description** |
| IT-ITeS | Information Technology - Information Technology enabled Services |
| BPM | Business Process Management |
| BPO | Business Process Outsourcing |
| KPO | Knowledge Process Outsourcing |
| LPO | Legal Process Outsourcing |
| IPO | Information Process Outsourcing |
| BCA | Bachelor of Computer Applications |
| B.Sc. | Bachelor of Science |
| OS | Occupational Standard(s) |
| NOS | National Occupational Standard(s) |
| QP | Qualifications Pack |
| UGC | University Grants Commission |
| MHRD | Ministry of Human Resource Development |
| MoLE | Ministry of Labor and Employment |
| NVEQF | National Vocational Education Qualifications Framework |
| NVQF | National Vocational Qualifications Framework |

**National Occupational Standard**

**Overview**

**This unit is about dealing with queries received from customers by e-mail or chat.**

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| **Unit Code**  Applicable NOS Unit | **SSC/N3021** |
| **Unit Title**  **(Task)** | Deal remotely with customer queries |
| **Description** | This unit is about dealing with queries received from customers by e-mail or chat. |
| Scope | This unit/task covers the following:  **Customers**:   * internal * external   **Queries** received by:   * e-mail * chat   **Appropriate people**:   * supervisor * other members of your team * subject matter experts |
| **Performance Criteria (PC) w.r.t. the Scope** | |
|  | To be competent, you must be able to:   1. greet customers and verify their details, following your organization’s procedures 2. read carefully, summarize, and obtain **customer** confirmation of, your understanding of queries 3. express your concern for any difficulties caused and your commitment to resolving queries 4. record and categorize queries accurately using your organization’s query management tool 5. refer queries outside your area of competence or authority promptly to **appropriate people** 6. access your organization’s knowledge base for solutions to queries, where available 7. resolve queries within your area of competence or authority in line with organizational guidelines and service level agreements (SLAs) 8. obtain advice and guidance from **appropriate people**, where necessary 9. obtain confirmation from **customers** that queries have been resolved to their satisfaction 10. record the resolution of queries accurately using your organization’s query management tool 11. comply with relevant standards, policies, procedures and guidelines when dealing remotely with **customer** queries |
| **Knowledge and Understanding (K)** | |
| 1. **Organizational**   **Context** (Knowledge of the company/ organization and its processes) | You need to know and understand:   1. your organization’s standards, policies, procedures, guidelines and service level agreements for dealing with customer queries and your role and responsibilities in relation to these 2. your organization’s management tools and systems for recording, categorizing and resolving customer queries 3. your organization’s customer relationship management (CRM) tools and systems and how to use these 4. the importance of documenting, classifying and prioritizing customer queries 5. your organization’s knowledge base and how to use this to identify solutions 6. where to refer queries outside your authority 7. who to seek advice and guidance from 8. the importance resolving customer queries 9. standard tools, templates and scripts available for dealing with customer queries 10. limits of your role and responsibilities in relation to customer queries 11. the importance of keeping customers informed about timescales for progress and resolution of customer queries 12. typical response times for customer queries and the importance of these |
| **B. Technical**  **Knowledge** | You need to know and understand:   1. relevant standards, policies, procedures and guidelines that apply when dealing with customer queries 2. relevant product reference guides or support materials to resolve queries 3. common types of customer queries and how to resolve them 4. different styles and approaches when working with customers 5. techniques for conveying concern and commitment 6. different questioning techniques for understanding customer queries 7. issues that may affect customer satisfaction and how to deal with these 8. current practice in customer service |
| **Skills (S)** | |
| 1. **Core Skills/ Generic Skills** | **Writing Skills** |
| You need to know and understand how to:   1. communicate with others in writing 2. complete accurate well written work with attention to detail |
| **Reading Skills** |
| You need to know and understand how to:   1. read instructions, guidelines, procedures, rules and service level agreements |
| **Oral Communication (Listening and Speaking skills)** |
| You need to know and understand how to:   1. listen effectively and orally communicate information accurately 2. ask for clarification and advice from others |
| 1. **Professional Skills** | **Decision Making** |
| You need to know and understand how to:   1. make decisions on suitable courses of action 2. follow rule-based decision-making processes |
| **Plan and Organize** |
| You need to know and understand how to:   1. plan and organize your work to achieve targets and deadlines |
| **Customer Centricity** |
| You need to know and understand how to:   1. build and maintain positive and effective relationships with customers 2. work effectively in a customer facing environment 3. deliver consistent and reliable service to customers 4. check your own work meets customer requirements 5. carry out rule-based transactions in line with customer-specific guidelines, procedures, rules and service level agreements |
| **Problem Solving** |
| You need to know and understand how to:   1. apply problem-solving approaches in different situations 2. seek clarification on problems from others |
| **Analytical Thinking** |
| You need to know and understand how to:   1. pass on relevant information to others 2. analyze data and activities |
| **Critical Thinking** |
| You need to know and understand how to:   1. apply balanced judgments to different situations |
| **Attention to Detail** |
| You need to know and understand how to:   1. check your work is complete and free from errors |
| **Team Working** |
| You need to know and understand how to:   1. work effectively in a team environment 2. work independently and collaboratively |
| 1. **Technical Skills** | You need to know and understand how to:   1. use information technology effectively to input and/or extract data accurately 2. store and retrieve information 3. identify and refer anomalies in data 4. keep up to date with changes, procedures and practices in your role |

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| **NOS Code** | **SSC/N3021** | | |
| **Credits(NVEQF/NVQF/NSQF)**  **[*OPTIONAL*]** | **TBD** | **Version number** | **0.1** |
| **Industry** | **IT-ITeS** | **Drafted on** | **30/04/2013** |
| **Industry Sub-sector** | **Business Process Management** | **Last reviewed on** | **30/04/2013** |
|  |  | **Next review date** | **30/06/2014** |

**NOS Version control**

**National Occupational Standard**

**Overview**

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

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| Applicable NOS Unit | **Unit Code** | **SSC/N9001** |
| **Unit Title**  **(Task)** | Manage your work to meet requirements |
| **Description** | This unit is about planning and organizing your work in order to complete it to the required standards on time. |
| Scope | This unit/task covers the following:  **Work requirements**:   * activities (what you are required to do) * deliverables (the outputs of your work) * quantity (the volume of work you are expected to complete) * standards (what is acceptable performance, including compliance with Service Level Agreements) * timing (when your work needs to be completed)   **Appropriate people**:   * line manager * the person requesting the work * members of the team/department * members from other teams/departments   **Resources**:   * equipment * materials * information |
| **Performance Criteria (PC) w.r.t. the Scope** | |
|  | To be competent on the job, you must be able to:   1. establish and agree your **work** **requirements** with **appropriate people** 2. keep your immediate work area clean and tidy 3. utilize your time effectively 4. use **resources** correctly and efficiently 5. treat confidential information correctly 6. work in line with your organization’s policies and procedures 7. work within the limits of your job role 8. obtain guidance from **appropriate people**, where necessary 9. ensure your work meets the agreed **requirements** |
| **Knowledge and Understanding (K)** | |
| 1. **Organizational Context** (Knowledge of the company/ organization and its processes) | You need to know and understand:   1. the organization’s policies, procedures and priorities for your area of work and your role and responsibilities in carrying out your work 2. the limits of your responsibilities and when to involve others 3. your specific work requirements and who these must be agreed with 4. the importance of having a tidy work area and how to do this 5. how to prioritize your workload according to urgency and importance and the benefits of this 6. the organization’s policies and procedures for dealing with confidential information and the importance of complying with these 7. the purpose of keeping others updated with the progress of your work 8. who to obtain guidance from and the typical circumstances when this may be required 9. the purpose and value of being flexible and adapting work plans to reflect change |
| 1. **Technical Knowledge** | You need to know and understand:   1. the importance of completing work accurately and how to do this 2. appropriate timescales for completing your work and the implications of not meeting these for you and the organization 3. resources needed for your work and how to obtain and use these |
| **Skills (S)** | |
| 1. **Core Skills/ Generic Skills** | **Writing Skills** |
| You need to know and understand how to:   1. complete accurate work with attention to detail |
| **Reading Skills** |
| You need to know and understand how to:   1. read instructions, guidelines/procedures |
| **Oral Communication (Listening and Speaking skills)** |
| You need to know and understand how to:   1. ask for clarification and advice from line managers 2. communicate orally with colleagues |
| 1. **Professional Skills** | **Decision Making** |
| You need to know and understand how to:   1. make a decision on a suitable course of action |
| **Plan and Organize** |
| You need to know and understand how to:   1. plan and organize your work to achieve targets and deadlines 2. agree objectives and work requirements |
| **Customer Centricity** |
| You need to know and understand how to:   1. deliver consistent and reliable service to customers 2. check your own work meets customer requirements |
| **Problem Solving** |
| You need to know and understand how to:   1. refer anomalies to the line manager |
| **Analytical Thinking** |
| You need to know and understand how to:   1. Provide relevant information to others |
| **Critical Thinking** |
| You need to know and understand how to:   1. apply judgements to different situations |
| **Attention to Detail** |
| You need to know and understand how to:   1. apply good attention to detail 2. check your work is complete and free from errors 3. get your work checked by peers |
| **Team Working** |
| You need to know and understand how to:   1. work effectively in a team environment |
| 1. **Technical Skills** | You need to know and understand how to:   1. use information technology effectively, to input and/or extract data accurately 2. identify and refer anomalies in data 3. store and retrieve information 4. keep up to date with changes, procedures and practices in your role |

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| **NOS Code** | **SSC/N9001** | | |
| **Credits(NVEQF/NVQF/NSQF)**  **[*OPTIONAL*]** | **TBD** | **Version number** | **0.1** |
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|  |  | **Next review date** | **30/06/2014** |

**National Occupational Standard**

**Overview**

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

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| Applicable NOS Unit | **Unit Code** | **SSC/N9003** |
| **Unit Title**  **(Task)** | Maintain a healthy, safe and secure working environment |
| **Description** | This unit is about monitoring the working environment and making sure it meets requirements for health, safety and security. |
| Scope | This unit/task covers the following:  Emergency procedures:   * illness * accidents * fires * other reasons to evacuate the premises * breaches of security   Resources(needed to achieve the unit objectives):   * information * government agencies in the areas of safety, health and security and their norms and services |
| **Performance Criteria (PC) w.r.t. the Scope** | |
|  | To be competent, you must be able to:   1. comply with your organization’s current health, safety and security policies and procedures 2. report any identified breaches in health, safety, and security policies and procedures to the designated person 3. identify and correct any hazards that you can deal with safely, competently and within the limits of your authority 4. report any hazards that you are not allowed to deal with to the relevant person in line with organizational procedures and warn other people who may be affected 5. follow your organization’s emergency procedures promptly, calmly, and efficiently 6. identify and recommend opportunities for improving health, safety, and security to the designated person 7. complete any health and safety records legibly and accurately |
| **Knowledge and Understanding (K)** | |
| 1. **Organizational Context** (Knowledge of the company/ organization and its processes) | You need to know and understand:   1. legislative requirements and organization’s procedures for health, safety and security and your role and responsibilities in relation to this 2. what is meant by a hazard, including the different types of health and safety hazards that can be found in the workplace 3. how and when to report hazards 4. the limits of your responsibility for dealing with hazards 5. the organisation’s emergency procedures for different emergency situations and the importance of following these 6. the importance of maintaining high standards of health, safety and security 7. implications that any non-compliance with health, safety and security may have on individuals and the organization |
| 1. **Technical Knowledge** | You need to know and understand:   1. different types of beaches in health, safety and security and how and when to report these 2. evacuation procedures for workers and visitors 3. how to summon medical assistance and the emergency   services, where necessary   1. How to use the health, safety and accident reporting   procedures and the importance of these |
| **Skills (S)** | |
| 1. **Core Skills/ Generic Skills** | **Writing Skills** |
| You need to know and understand how to:   1. complete accurate, well written work with attention to detail |
| **Reading Skills** |
| You need to know and understand how to:   1. read instructions, guidelines/procedures/rules |
| **Oral Communication (Listening and Speaking skills)** |
| You need to know and understand how to:   1. listen effectively and orally communicate information accurately |
| 1. **Professional Skills** | **Decision Making** |
| You need to know and understand how to:   1. make decisions on a suitable course of action or response |
| **Plan and Organize** |
| You need to know and understand how to:   1. plan and organize your work to achieve targets and deadlines |
| **Customer Centricity** |
| You need to know and understand how to:   1. build and maintain positive and effective relationships with   colleagues and customers |
| **Problem Solving** |
| You need to know and understand how to:   1. apply problem solving approaches in different situations |
| **Analytical Thinking** |
| You need to know and understand how to:   1. analyse data and activities |
| **Critical Thinking** |
| You need to know and understand how to:   1. apply balanced judgements to different situations |
| **Attention to Detail** |
| You need to know and understand how to:   1. apply good attention to detail 2. check your work is complete and free from errors 3. get your work checked by peers |
| **Team Working** |
| You need to know and understand how to:   1. work effectively in a team environment |
| 1. **Technical Skills** | You need to know and understand how to:   1. identify and refer anomalies 2. help reach agreements with colleagues 3. keep up to date with changes, procedures and practices in your role |

**NOS Version Control**

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| **NOS Code** | **SSC/N9003** | | |
| **Credits(NVEQF/NVQF/NSQF)**  **[*OPTIONAL*]** | **TBD** | **Version number** | **0.1** |
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