



COMPETENCIES

Certification testing for the **CIAC-Certified Strategic Leader (CCSL)** designation is based on industry-defined competencies that specify the knowledge and skills required for the award of professional competency in call center strategic leadership and management. The competencies are universally written in scope and definition to ensure their applicability to individuals working in call center organizations worldwide of every business type, industry sector and size.

Definition of the competencies was facilitated by the Call Center Industry Advisory Council (CIAC) through extensive industry collaboration, research and job role profiling. The competencies have been formally validated as measurable indicators of job performance and approved by an internationally representative cross-section of call center practitioners, training professionals and subject matter experts. CIAC conducts routine reviews of the competencies to ensure their currency and relevance to the job role requirements.

The competencies are categorized into four domains:

- People Management
- Operations Management
- Customer Relationship Management
- Leadership and Business Management

Professional competence for the CIAC-Certified Strategic Leader designation is assessed via a five-part testing process corresponding to the competency domains. Test questions are weighted by competency area (see below) and representative of all levels of Bloom's taxonomy (with emphasis on higher cognitive levels).

The competencies also represent the subject matter for training content. In this regard, training is not mandated to test for CIAC Certification; nor does CIAC Certification prescribe to any specific training curriculum.

Competency Weighting of Test Questions:

PEOPLE MANAGEMENT

- Organizational Design & Staffing - 26%
- Professional Development - 16%
- Individual & Team Performance - 24%
- Human Resources - 20%
- Teams - 14%

OPERATIONS MANAGEMENT

- Service Level & Quality - 43%
- Technology & Service Delivery - 27%
- Call Center Facilities & Work Environment 30%

CUSTOMER RELATIONSHIP MANAGEMENT

- Internal & External Customer Relationships - 100%

LEADERSHIP & BUSINESS MANAGEMENT

- Leadership Practices & Principles - 26%
- Business Management Practices & Principles - 20%
- Call Center Business - 22%
- Financial Practices & Principles - 13%
- Contractual Relationships -15%

Call Center Strategic Leader Competencies

I. PEOPLE MANAGEMENT DOMAIN

A. Organizational Structure and Staffing

1. Construct a call center organizational structure and staffing strategy that aligns with enterprise objectives
 - a. Define call center job roles, responsibilities and agent groups that support the call center organizational structure and staffing strategy
2. Create a strategic call center staffing plan that supports enterprise objectives
 - a. Determine required staff qualifications and requirements
 - b. Create a short-term (3 – 12 month) call center staffing plan with an appropriate workforce mix and staffing alternatives
 - c. Determine full-time equivalent (FTE) requirements
3. Establish processes, procedures and responsibilities for attracting, recruiting and selecting candidates for call center staff positions
 - a. Create a recruiting plan that generates qualified and diverse candidates for call center staff positions
 - b. Identify resources for recruiting a diverse workforce
 - c. Define the interview process; types of interviews and tools and commonly used employment terms
 - d. Define the selection/hiring process
4. Develop a retention strategy that reduces voluntary turnover of call center personnel
 - a. Identify the types and causes of call center turnover and factors that impact agent retention

B. Professional Development

1. Create and sustain a call center culture and work environment that inspires and enables continuous learning and improvement
 - a. Provide opportunities for ongoing professional development and continuous improvement
 - b. Provide access to appropriate tools and learning resources
 - c. Implement mentoring and coaching
2. Determine current and future professional development needs of call center staff
 - a. Identify competency requirements by call center job role
 - b. Identify strengths and development needs of direct reports
3. Develop a call center training strategy
 - a. Align training initiatives with the call center training strategy
 - b. Create a training plan
 - c. Evaluate the effectiveness of training
 - d. Provide for employee orientation (to the organization, call center, job role and team)
4. Create a plan for continuous self-improvement and professional development

C. Individual and Team Performance

1. Establish objectives for individual and team performance
2. Develop a methodology to monitor and improve performance
3. Implement a monitoring and coaching program
4. Address poor performance constructively and within applicable guidelines
5. Conduct a performance review that takes into consideration different behavioral styles
 - a. Collaborate with staff to establish performance objectives and work standards
 - b. Discuss strengths and weaknesses of staff
 - c. Document a performance review
6. Develop, implement, and administer a compensation plan to recognize and reward performance excellence
7. Cultivate and sustain a work environment that motivates high performance, recognizes and rewards individual and team excellence; and instills employee loyalty
 - a. Implement and administer an incentive plan

Call Center Strategic Leader Competencies

D. Human Resources

1. Build, manage, and leverage a diverse workforce
2. Manage contract and temporary staff in accordance with applicable organizational policy and regulations
3. Align employee related decisions with applicable organizational policy and regulations
4. Manage remote staff in accordance with applicable organizational policy and regulations
5. Address privacy issues in accordance with applicable organizational policy, regulations, and moral/ethical considerations
6. Design and establish a career path model
7. Create and administer an employee satisfaction survey
 - a. Identify and implement appropriate actions based on survey results
 - b. Track and use organization-wide satisfaction data to enhance the call center image and resolve issues
8. Apply principles of conflict resolution
9. Identify and enable empowerment opportunities
 - a. Provide the tools, authority, and support to enable employee decision-making (including decisions formerly dictated by management)
 - b. Identify and address obstacles to empowerment
 - c. Develop the trust and support of center staff and other personnel

E. Teams

1. Establish and sustain a culture that enables a high-performance team
2. Create and sponsor a cross-functional team through shared vision, goals, and planning
 - a. Develop and align team goals with organizational objectives
 - b. Access the organization's resources to support shared initiatives and objectives
 - c. Lead a cross-functional team
3. Identify and execute a strategy for building team effectiveness
 - a. Determine and establish a team structure
 - b. Model and instill team building skills (e.g., conflict resolution; role clarification; effective communications; goal setting)
4. Leverage expertise and build collaborative relationships

II. OPERATIONS MANAGEMENT DOMAIN

A. Service Level and Quality

1. Negotiate, establish, and maintain internal and external service level agreements with business units and service providers that have an impact on call center performance
 - a. Develop and implement a plan to meet service level agreements
 - b. Create a service provider assessment instrument to manage service level agreements
 - c. Utilize a service provider assessment instrument to manage vendors
2. Establish service level, response time, and quality goals
 - a. Create a plan to meet service level, response time, and quality goals
 - b. Maintain agreed service level and quality standards
3. Establish key performance indicators that enables the call center to meet customer requirements
 - a. Demonstrate working knowledge of key performance indicators (not all inclusive):

<ul style="list-style-type: none"> ‣ Average Call Value ‣ Customer Satisfaction ‣ Service Level ‣ Percent Abandoned ‣ Cost Per Call ‣ Errors and Rework/First Call Resolution ‣ Forecasted Call Load vs. Actual 	<ul style="list-style-type: none"> ‣ Scheduled Staff to Actual ‣ Adherence to Schedule ‣ Average Handling Time ‣ Productive vs. Non-Productive ‣ Average Speed of Answer (ASA) ‣ Occupancy
--	--
 - b. Develop and utilize a mechanism to track and report key performance indicators data
 - c. Manage the call center to achieve key performance indicators
 - d. Identify obstacles to meeting key performance indicator targets; enact solutions that meets customer requirements and supports call center business objectives

Call Center Strategic Leader Competencies

4. Forecast workload using statistical techniques
 - a. Optimize staff and schedule requirements
 - b. Create and implement a plan to ensure call center contact activities meet requirements
5. Schedule staff to forecasted workload
 - a. Ensure adherence to schedule
6. Identify and apply principles that enable continuous quality assurance and process improvement

B. Technology and Service Delivery

1. Align technology with business objectives, application need(s), and financial considerations
 - a. Maximize call center investment in technology
 - b. Manage the implementation of technology
 - c. Ensure technology is implemented with minimal negative impact
2. Identify and address single site versus virtual-site environments issues (multi-site, remote agents, etc.)
3. Identify and manage key customer related processes
4. Align technology, processes and customer requirements to enhance service and reduce cost
5. Evaluate the applicability of new and emerging technology to enable enhanced customer service and better support business objectives
 - a. Develop a business case to evaluate new and emerging technology
 - b. Ensure successful integration of new technology with legacy systems
 - c. Leverage system integration opportunities to maximize service delivery
6. Formulate and execute a call distribution strategy
 - a. Develop a call distribution rationale

C. Call Center Facilities and Work Environment

1. Apply the principles of call center site selection and design
 - a. Develop site selection criteria based on the organization's business objectives
2. Select a site based on agreed selection criteria and approved business case
 - a. Develop a site selection business case that aligns with strategic objectives
3. Assess floor plan design options
 - a. Select an optimal floor plan design
4. Develop a disaster recovery strategy and contingency plan
 - a. Test and execute a disaster recovery strategy
 - b. Implement a contingency plan
5. Maintain a healthy, safe and secure work environment
 - a. Assess and address workplace ergonomic issues and considerations
 - b. Ensure adherence to ergonomic requirements
 - c. Monitor the safety and security of the work environment
 - d. Ensure staff adherence to applicable health and safety policy and regulations
6. Ensure adherence to applicable disability policy and regulations

III. CUSTOMER RELATIONSHIP MANAGEMENT DOMAIN

A. Internal and External Customer Relationships

1. Identify the dynamics and economics of customer acquisition, retention, value, and access
 - a. Segment customers to align with organizational strategy
 - b. Identify and quantify customer expectations and related business drivers
 - c. Identify the fundamental aspects of consistently delivering a positive customer experience
2. Evaluate the effectiveness of service delivery and its impact on customer satisfaction
 - a. Measure customer satisfaction
 - b. Use root cause analysis to identify areas of poor service and factors that contribute to customer satisfaction
 - c. Monitor and test customer accessibility
 - d. Establish a mechanism for capturing and leveraging customer feedback throughout the organization

Call Center Strategic Leader Competencies

3. Develop a strategy to manage and enhance the customer experience
 - a. Contribute to the organization's customer service strategy and business planning process
 - b. Design and apply an operational model that meets customer needs and organizational requirements
 - c. Develop and execute a strategy that aligns human resources, business processes, and technology to ensure a positive customer experience
4. Establish the value of a positive customer relationship
 - a. Create and implement a plan that communicates the benefits of a positive and meaningful customer experience
5. Develop partnerships that help to identify customer needs and enable a successful customer relationship management strategy
 - a. Build networks of people (internal and external) to support successful customer relationships
 - b. Maintain relationships with colleagues to support a successful customer relationship
 - c. Collect and disseminate business and market intelligence to stakeholders
6. Identify and implement technology and processes that enhance the customer experience
 - a. Identify processes that empower people to improve the customer experience
 - b. Develop and activate a process that improves customer accessibility
 - c. Utilize technology to gather and disseminate customer intelligence and feedback
 - d. Identify and enable self-service options for customers

IV. LEADERSHIP and BUSINESS MANAGEMENT DOMAIN

A. Leadership Practices and Principles

1. Collaborate with staff to establish the call center vision and mission
 - a. Create a shared vision resulting in employee commitment and loyalty
 - b. Align day-to-day activities with the call center vision and mission
 - c. Communicate the call center vision, mission and role to internal and external audiences
 - d. Model the organization's core values, principles, and philosophies
 - e. Determine community relations initiatives and implement appropriate programs and activities
2. Develop and execute a strategy to accomplish the call center mission and support organizational objectives
3. Align call center objectives with organizational and customer objectives
4. Position and promote the call center as value-added to the organization
 - a. Identify how the call center adds value to the organization
 - b. Develop and implement a plan that communicates the call center value proposition
5. Act as a conduit for information flow from customers and employees to senior management

B. Business Management Practices and Principles

1. Develop and execute a call center business strategy
 - a. Translate organizational objectives into call center goals
2. Create and implement a strategic business plan
 - a. Create and implement an annual operating plan
 - b. Translate call centers goals into project plans
 - c. Manage project plans to ensure successful outcome
2. Acquire intelligence of business drivers and trends, competitive forces and regulatory requirements
 - a. Compile and disseminate market research and intelligence to the organization
3. Develop and implement a plan to communicate call center initiatives
4. Develop and apply methodologies to improve operational results

C. Call Center Business

1. Describe the call center's role in the organization
2. Identify and adhere to regulations
3. Demonstrate knowledge of call center terminology

Call Center Strategic Leader Competencies

D. Financial Practices and Principles

1. Identify and leverage risk-and-opportunity tradeoffs
2. Develop an annual operating budget for the center
 - a. Negotiate approval of a call center budget
 - b. Manage a budget in accordance with variance reports
3. Demonstrate working knowledge of key financial concepts:
 - a. Buy versus lease
 - b. Depreciation schedules of fixed assets
 - c. Profit center versus cost center
 - d. Return on Assets (ROA); Return on Sales (ROS); Net Present Value (NPV); Internal Rate of Return (IRR); Return on Investment (ROI); and Cost/Benefit Analysis (Ratio)
4. Interpret the organization's financial statements

E. Contractual Relationships

1. Establish contractual criteria
 - a. Negotiate mutually beneficial contracts
2. Establish and manage contractual relationships
 - a. Assess the quality of contractual relationships
 - b. Utilize data to manage contractual relationships
3. Identify contractual issues that need to be escalated
 - a. Use appropriate escalation channels

(END)