**Federal Democratic Republic of Ethiopia**
**OCCUPATIONAL STANDARD**

# RAILWAY PASSENGER SERVICE MANAGEMENT

## NTQF Level V

*Ministry of Education*
*March 2013*

# Introduction

Ethiopia has embarked on a process of reforming its TVET-System. Within the policies and strategies of the Ethiopian Government, technology transformation – by using international standards and international best practices as the basis, and, adopting, adapting and verifying them in the Ethiopian context – is a pivotal element. TVET is given an important role with regard to technology transfer. The new paradigm in the outcome-based TVET system is the orientation at the current and anticipated future demand of the economy and the labor market.

The Ethiopian Occupational Standards (EOS) are - a core element of the Ethiopian National TVET-Strategy and an important factor within the context of the National TVET-Qualification Framework (NTQF).They are national Ethiopia standards, which define the occupational requirements and expected outcome related to a specific occupation without taking TVET delivery into account.

This document details the mandatory format, sequencing, wording and layout for the Ethiopian Occupational Standard comprised of Units of Competence.

A Unit of Competence describes a distinct work activity.  It is documented in a standard format that comprises:

- Reference to Industry Sector, Occupational title, NTQF level
- Unit code
- Unit title
- Unit descriptor
- Unit of Competence
- Elements and performance criteria
- Variables and Range statement
- Evidence guide

Together all the parts of a Unit of Competence guide the assessor in determining whether the candidate is competent.

The ensuing sections of this EOS document comprise a description of the respective occupation with all the key components of a Unit of Competence:

- chart with an overview of all Units of Competence for the respective level including the Unit Codes and Unit of Titles

- contents of each Unit of Competence (competence standard)

- occupational map providing the Technical and Vocational Education and Training (TVET) providers with information and important requirements to consider when designing training programs for this standards, and for the individual, a career path

**UNIT OF COMPETENCE CHART**

| Occupational Standard: Railway Passenger Service Management | | |
|---|---|---|
| Occupational Code: **EIS RPM** | | |
| ***NTQF level V*** | | |

| | | |
|---|---|---|
| EIS RPM5 01 0213<br>Manage Customer Service | EIS RPM5 02 0213<br>Identify and Interpret Compliance Requirements | EIS RPM5 03 0213<br>Manage Meetings |
| EIS RPM5 04 0213<br>Manage Quality Customer Service | EIS RPM5 05 0213<br>Integrate Customer Contact Operations in the Organization | EIS RPM5 06 0213<br>Optimize Customer Contact Operations |
| EIS RPM5 07 0213<br>Manage Customer Contact Information | EIS RPM5 08 0213<br>Design and Launch New Customer Contact Facilities | EIS RPM5 09 0213<br>Develop and Maintain a Customer Contact Marketing Strategy |
| EIS RPM5 10 0213<br>Manage Customer Contact Operational Costs | EIS RPM5 11 0213<br>Manage Customer Contact Centre Staffing | EIS RPM5 12 0213<br>Manage Project Quality |
| EIS RPM5 13 0213<br>Facilitate and Capitalize on Change and Innovation | EIS RPM5 14 0213<br>Establish and Conduct Business Relationships | EIS RPM5 15 0213<br>Manage Continuous Improvement Process (Kaizen) |

| Occupational Standard: Railway passenger Service Management Level V | |
|---|---|
| **Unit Title** | **Manage Customer Service** |
| **Unit Code** | **EIS RPM5 01 0213** |
| **Unit Descriptor** | This unit involves the skills and knowledge required to manage customer service. It includes planning to meet internal and external customer requirements; ensuring delivery of quality products/services; and monitoring, adjusting and reporting customer service. |

| Elements | Performance Criteria |
|---|---|
| 1 Plan to meet internal and external customer requirements | 1.1 The needs of customers are researched, understood and assessed, and included in the planning process. |
| | 1.2 Provision is made in plans to achieve the quality, time and cost specifications agreed with customers. |
| 2 Ensure delivery of quality products**/**services | 2.1 Products/services are delivered to ***customer service standard*** specifications within the team's/organization's business plan. |
| | 2.2 Individual/team performance is measured consistently meets quality, safety, resource and delivery standards. |
| | 2.3 Coaching and mentoring are made assist colleagues to overcome difficulty in meeting customer service standards. |
| | 2.4 Resources are used effectively and efficiently to provide quality products/services to customers. |
| 3 Monitor**,** adjust and report customer service | 3.1 Organizations are used ***appropriate systems*** and technology is to monitor progress in achieving product/service targets and standards. |
| | 3.2 Customer feedback is sought and used to improve the provision of products/services. |
| | 3.3 Decisions are taken to overcome problems and make improvements ***documentation and records*** to products/services in consultation with designated individuals/groups by applying ***applicable legislation and regulations***. |
| | 3.4 Adjustments are made to products/services, and those who have a role in their planning and delivery are informed of changes. |

| Variable | Range |
|---|---|
| Customer service standards and | may include:<br>• response times/delivery times<br>• protocols to which staff are trained to provide consistent quality service<br>• quality specifications |
| Appropriate systems | may include:<br>• quality management<br>• customer feedback/response |
| Documentation and records | may include:<br>• quality assurance procedures<br>• emergency procedures<br>• customer surveys, lists of complaints, reports from staff in relation to customers |
| Applicable legislation and regulations | may include:<br>• Ethiopian legislation, regulations and codes of practice, including consumer protection legislation<br>• workplace relations regulations |

| Evidence Guide | |
|---|---|
| Critical aspects of Competence | Demonstrates skills and knowledge in:<br>• Risk management as it relates to dealings with customers, and managing potential fall-out from poor customer service<br>• Performance management systems used in the organization<br>• Quality management systems<br>• Requirements for completing relevant documentation such as reports of customer complaints and resolutions<br>• Steps involved in planning the work activities<br>• Prepare reports to develop and disseminate information on customer service performance<br>• Interpret and follow operational instructions and priorities work |
| Underpinning Knowledge and Attitudes | Demonstrate knowledge in:<br>• Relevant sections of national and state or territory regulatory requirements and codes of practice such as consumer protection legislation<br>• Relevant OHS and environmental procedures and regulations<br>• Organizational policies, principles, codes and performance standards<br>• Risk management as it relates to dealings with customers, and managing potential fall-out from poor customer service<br>• Performance management systems used in the organization<br>• Quality management systems |

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| | • Requirements for completing relevant documentation such as reports of customer complaints and resolutions<br>• Steps involved in planning the work activities |
| Underpinning Skills | Demonstrates skills to:<br>• Communicate and consult with others to ensure excellent customer service is modeled to staff and that customer issues are resolved<br>• Prepare reports to develop and disseminate information on customer service performance<br>• Interpret and follow operational instructions and priorities work<br>• Adapt appropriately to cultural differences in the workplace, including modes of behavior and interactions with others<br>• Deal effectively with unplanned events such as a change in the volume of customer enquiries<br>• Monitor work activities in terms of planned schedule, particularly in line with agreed time and quality standards |
| Resources Implication | Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices. |
| Methods of Assessment | Competence may be assessed through:<br>• Interview / Written Test<br>• Observation / Demonstration with Oral Questioning |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting. |

| Occupational Standard: Railway passenger Service Management Level V | |
|---|---|
| **Unit Title** | **Identify and Interpret Compliance Requirements** |
| **Unit Code** | **EIS RPM5 02 0213** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to identify and interpret the range of internal and external compliance requirements and obligations that must be fulfilled by an organisation.<br><br>A range of legislation, rules, regulations and codes of practice may apply to this unit at the time of endorsement, depending on job roles and jurisdictions. |

| Elements | Performance Criteria |
|---|---|
| 1. Clarify the scope of operations | 1.1 The relevant ***range of operations*** and the sphere of business arrangements of the organisation are identified and reviewed. |
| | 1.2 An analysis of the operations and business arrangements of the organisation are conducted and the functions, products and services that may be subject to ***compliance requirements*** are identified. |
| | 1.3 Work activity plans are developed and documented for determining relevant compliance requirements. |
| | 1.4 Approval of plans is obtained from relevant organisational personnel. |
| 2. Identify compliance requirements | 2.1 Conduct a search of ***information on internal and external compliance requirements*** using appropriate ***search resources***, including ***relevant Ethiopian and international standards***. |
| | 2.2 Ensure the search of compliance requirements scans across all relevant ***jurisdictions of laws***, ***regulations***, ***and industry and organisational codes and standards*** and identify pertinent compliance requirements. |
| | 2.3 Information collected in terms of its relevance to the organisation's operations, services and products is progressively reviewed. |
| | 2.4 Gathered ***information on relevant compliance requirements*** is organised and stored in an appropriate format for further analysis. |

| 3. Interpret, analyze and prioritize identified compliance requirements | 3.1. Collected information is reviewed and interpreted in terms of its relevance to the organisation's functions, services and products. |
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| | 3.2. Discuss and clarify with *relevant internal or external personnel* ambiguities, uncertainties and problems experienced in interpreting identified compliance information. |
| | 3.3. Relevant compliance requirements are identified, analysed and prioritised in terms of critical implications for the organisation and risks and consequence of possible breaches. |
| | 3.4. Group pertinent compliance requirements into those that are critical and central to the organisation's operations, those that are important in some circumstances but are not central to the organisation's operations, and those that are pertinent but are incidental to the organisation's operations. |
| 4. Document compliance requirements | 4.1. Outcomes of the identification and interpretation activities are organised and documented. |
| | 4.2. Relevant compliance requirements and assessment of implications reports are prepared and communicated to *relevant personnel performing specific compliance management functions*. |

| Variable | Range |
|---|---|
| Range of operations | may include:<br>• full range of operations of an organization at a particular site<br>• full range of operations of an organization distributed across multiple sites<br>• full range of operations of an organization, including mobile units such as vehicles, railway trains, maritime vessels and aircraft<br>• Operations of a particular section or organizational unit. |
| Compliance requirements | may include:<br>• cross-industry, industry-specific and internal organizational compliance requirements in such areas as (examples in alphabetical groupings):<br>• anti-discrimination, including discrimination by race, sex, disability, religion, etc.; alcohol licensing, including licensing regulations covering clubs, pubs, licensed premises, etc.; aviation<br>• bankruptcy<br>• chemical use, child protection, construction, conveyance/real estate, copyright, corporate governance, customs, credit |

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| | • education, electricity, environmental protection, equal opportunity |
| | • financial services, including banking; fire; food hygiene; freedom of information; freight forwarding |
| | • gambling, gene technology |
| | • health, human rights |
| | • insurance, immigration, intellectual property |
| | • land management |
| | • maritime, mining |
| | • pharmaceuticals, patents, privacy |
| | • quarantine |
| | • racing, rail transport, road transport |
| | • safety, including cross-industry generic regulations as well as industry, equipment or product-specific subcategories, e.g. marine safety, rail safety, food safety, aviation safety, road safety, dangerous goods, construction safety, mine safety, etc.; security; sewage; superannuation |
| | • taxation, telecommunications, tobacco, trade practices and consumer protection |
| | • water supply, workers compensation, workers rehabilitation |
| | • different types of internal and external compliance requirements, including: |
| | • accreditation requirements of an institute, professional organization or registration body |
| | • internal policies, procedures, standards or codes of practice of an organization |
| | • regulations of a state or territory, national or international regulatory authority |
| | • requirements for certification under statutory licensing systems |
| | • Statutory standards or codes of practice. |
| Information on internal and external compliance requirements | may include: <br> • internal policies, standard operating procedures, standards, and codes of practice <br> • published material relevant to compliance held in either internal or external libraries <br> • Relevant legislation, regulations and licensing requirements pertinent to the organization's operations and sphere of business. |
| Search resources | may include: <br> • computer terminals linked to data sources either via the internet, internal networks, or CDs <br> • library resources and materials, including compliance-related books, journals, manuals, standards, CDs and other multimedia resources |

| | • Published information on such things as relevant legislation, regulations, licensing requirements, codes of practice and Ethiopian standards. |
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| Relevant Ethiopian and international standards | may include: <br> • Ethiopian standards compliance programs <br> • Ethiopian standards Passenger satisfaction - Guidelines for complaints handling in organizations <br> • Ethiopian standards Records management <br> • Ethiopian standards Risk management |
| Jurisdictions of laws, regulations, industry and organisational codes and standards | may include: <br> • global <br> • industry <br> • local <br> • national <br> • organizational <br> • State or territory. |
| Information on relevant compliance requirements | may include: <br> • correspondence, emails and other written information provided by internal and external personnel contacted during search activities <br> • information downloadable from relevant websites <br> • newsletters, bulletins and information sheets and other similar periodic documentation distributed by relevant regulatory authorities and standards bodies <br> • Published information on legislation, regulations, codes of practice, standards, licensing requirements, standard operating procedures, etc. <br> • Records of conversations and meetings with relevant internal and external personnel. |
| Relevant internal personnel or external personnel | may include: <br> • board of directors <br> • chief executive officer <br> • compliance management team <br> • compliance specialists at the operational level <br> • frontline managers <br> • Senior management team. <br> • legal and business advisors and consultants with expertise in compliance management <br> • representatives of professional associations and institutes relevant to the organization's operations and sphere of business <br> • Representatives of relevant authorities in pertinent compliance areas. |

| Relevant personnel performing specific compliance management functions | may include: |
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| | • compliance management consultants |
| | • compliance management officers |
| | • compliance managers |
| | • legal personnel specializing in compliance management |
| | • Line managers with specific compliance functions. |

| **Evidence Guide** | |
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| Critical aspects of Competence | Demonstrates skills and knowledge in: |
| | • compliance reporting procedures |
| | • corporate induction and training processes related to compliance management |
| | • processes for the internal and external distribution and promotion of information on compliance requirements, and compliance programs and management systems |
| | • complaints handling systems |
| | • continuous improvement processes for compliance, including monitoring, evaluation and review |
| | • strategies for developing a positive compliance culture within the organization |
| | • techniques and performance indicators for monitoring the operation of a compliance program or management system: |
| |    ➢ interpersonal and communication skills to relate to internal and external personnel, including those representing relevant regulatory authorities, professional institutes and organizations, including standards' organizations |
| Underpinning Knowledge and Attitudes | Demonstrate knowledge in: |
| | • elements of compliance programs and related management systems, including: |
| |    ➢ documentation of compliance requirements relevant to the organization |
| |    ➢ specification of compliance management functions, accountabilities and responsibilities within the organization |
| |    ➢ compliance-related management information systems |
| |    ➢ record-keeping systems required for compliance management |
| |    ➢ liaison procedures with relevant internal and external personnel on compliance-related matters |
| |    ➢ breach management policies and processes, including the identification, classification, investigation, rectification and reporting of breaches in compliance requirements |
| |    ➢ compliance reporting procedures |
| |    ➢ corporate induction and training processes related to compliance management |
| |    ➢ processes for the internal and external distribution and |

| | | promotion of information on compliance requirements, and compliance programs and management systems |
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| | | <ul><li>➢ complaints handling systems</li><li>➢ continuous improvement processes for compliance, including monitoring, evaluation and review</li><li>➢ strategies for developing a positive compliance culture within the organization</li><li>➢ techniques and performance indicators for monitoring the operation of a compliance program or management system</li><li>➢ reporting processes on compliance management, including reports on breaches and rectification action</li><li>➢ relevant organizational policies and procedures, including:</li><li>➢ compliance plans and policies in various compliance areas</li><li>➢ organizational standards for operations and ethics</li></ul><ul><li>• relevant Ethiopian and international standards, including:</li><li>➢ Ethiopian standards Compliance programs</li><li>➢ Ethiopian standards Passenger satisfaction - Guidelines for complaints handling in organizations</li><li>➢ Ethiopian standards Records management</li><li>➢ Ethiopian standards Risk management</li></ul><ul><li>• relevant organizational policies and procedures, including:</li><li>➢ plans and policies in various compliance areas</li><li>➢ organizational standards for operations and ethics</li></ul> |
| Underpinning Skills | | Demonstrates skills in:<ul><li>• interpersonal skills to:</li><li>➢ contribute to the development of a positive culture of compliance within an organization</li><li>➢ work with internal and external personnel with an interest in an organization's compliance program and management system</li><li>➢ interpersonal and communication skills to relate to internal and external personnel, including those representing relevant regulatory authorities, professional institutes and organizations, including standards' organizations</li><li>➢ literacy skills to read and interpret various types of documents and to write reports containing complex concepts</li><li>➢ organizational and time-management skills to conduct compliance management activities</li></ul><ul><li>• project management skills to:</li><li>➢ scope and plan the conduct of compliance requirement identification activities</li><li>➢ manage other personnel involved in the identification and interpretation of compliance management activities</li><li>➢ research and analytical skills to identify and interpret compliance requirements</li></ul> |

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| | ➤ technical skills to use communications technology effectively |
| Resources Implication | Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices. |
| Methods of Assessment | Competence may be assessed through:<br>• Interview / Written Test<br>• Observation / Demonstration with Oral Questioning |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting. |

| Occupational Standard: Railway passenger Service Management Level V | |
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| **Unit Title** | **Manage Meetings** |
| **Unit Code** | **EIS RPM5 03 0213** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to manage a range of meetings including overseeing the meeting preparation processes, chairing meetings, organising the minutes and reporting meeting outcomes. |

| **Elements** | **Performance Criteria** |
|---|---|
| 1. Prepare for meetings | 1.1. *Agenda* is developed in line with stated *meeting purpose*. |
| | 1.2. Ensure style and structure of meeting are appropriate to its purpose. |
| | 1.3. Meeting participants are identified and notified in accordance with the organisational procedures. |
| | 1.4. *Meeting arrangements* are confirmed in accordance with requirements of meeting. |
| | 1.5. *Meeting papers* are despatched to participants within *designated time lines*. |
| 2. Conduct meetings | 2.1. Meetings are chaired in accordance with organisational requirements, agreed *conventions* for type of meeting and *legal and ethical requirements*. |
| | 2.2. Meetings are conducted to ensure they are focused, time efficient and achieve outcomes. |
| | 2.3. Ensure meeting facilitation enables participation, discussion, problem-solving and *resolution* of issues. |
| | 2.4. Brief minute taker on method for recording meeting notes in accordance with organisational requirements and conventions for type of meeting. |
| 3. Follow up meetings | 3.1. Transcribed meeting notes are checked to ensure they reflect a true and accurate record of the meeting, and are formatted in accordance with organisational procedures and meeting conventions. |
| | 3.2. Distribute and *store minutes* and other follow-up documentation within designated time lines, and according to organisational requirements. |
| | 3.3. Outcomes of meetings are reported as required, within designated time lines. |

| Variable | Range |
|---|---|
| Agenda | may include:<br>• correspondence<br>• date, time and location of meeting<br>• date of next meeting<br>• general business<br>• major agenda items<br>• matters or business arising from the minutes<br>• minutes of the previous meeting<br>• reports<br>• statement of the meeting's purpose<br>• welcome |
| Meeting purpose | may include:<br>• discussion forum for internal or external clients<br>• planning and development of a project<br>• progress of a project<br>• range of business items<br>• setting of enterprise or team goals |
| Meeting arrangements | may include:<br>• booking an appropriate venue<br>• deciding on process for recording of meeting<br>• establishing costs and operating within a budget<br>• identifying any specific needs of participants<br>• organizing accommodation and transport<br>• organizing appropriate communication technology<br>• organizing catering<br>• organizing a minute taker<br>• preparing relevant documentation for participants<br>• scheduling date and time for the meeting |
| Meeting papers | may include:<br>• agenda<br>• chairperson's report<br>• correspondence<br>• draft documentation<br>• financial reports<br>• itemized meeting papers<br>• notice of meeting<br>• previous minutes<br>• research reports |
| Designated time lines | may include:<br>• contractual obligations<br>• formal timeframe set by the organization |

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| | • informal timeframe set by the administrative organizer<br>• project time lines<br>• statutory requirements (e.g. for annual general meetings)<br>• timeframe decided by participants |
| Conventions | may include:<br>• casting vote for chairperson<br>• conflict of interest provisions<br>• consensus required<br>• informal discussion<br>• majority of members to agree<br>• moving and seconding formal motions<br>• quorum requirements<br>• restricting discussion to agenda items<br>• speaking through the chairperson<br>• time limit on speakers<br>• waiting to be recognized by the chairperson<br>• voting procedures |
| Legal and ethical requirements | may include:<br>• codes of practice<br>• legislation relating to companies and associations<br>• requirements for public meetings |
| Resolution | may include:<br>• agreeing on a course of action<br>• deferring decisions to another meeting |
| Store of minutes | may include:<br>• authorized access<br>• electronic storage in folders, sub-folders, disk drives, CD-ROM, USBs, tape or server back-up<br>• file names according to organizational procedure<br>• file names which are easily identifiable in relation to the content<br>• file and folder names which identify the operator, author, section, date<br>• filing locations<br>• organizational policy for backing up files<br>• organizational policy for filing hard copies of documents<br>• security<br>• meeting details (e.g. title, date, time, location)<br>• action items<br>• agenda items<br>• apologies and attendees<br>• approval of the record of previous minutes<br>• correspondence |

| | • date of the next meeting |
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| | • formatting from previous minutes |
| | • lists rather than complete sentences |
| | • matters arising from the previous meetings |
| | • names of absent and attending participants |
| | • organization templates |
| | • other business |
| | • reports |
| | • welcome |

| **Evidence Guide** | |
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| Critical aspects of Competence | Demonstrates skills and knowledge in: <br> • applying conventions and procedures for formal and informal meetings <br> • Chairing meetings in relation to agreed agendas. |
| Underpinning Knowledge and Attitudes | Demonstrate knowledge in: <br> • culturally appropriate techniques to communicate with people from diverse backgrounds and people with diverse abilities <br> • key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as: <br>     ➢ anti-discrimination legislation <br>     ➢ ethical principles <br>     ➢ codes of practice <br>     ➢ privacy laws <br>     ➢ copyright <br>     ➢ occupational health and safety <br> • formats for minutes and agendas <br>     ➢ group dynamics <br>     ➢ meeting terminology, structures, arrangements and responsibilities of chairperson <br>     ➢ Organizational procedures and policies regarding meetings, chairing and minutes. |
| Underpinning Skills | Demonstrates skills in: <br> • communication skills to: <br>     ➢ participate in sustained complex interpersonal exchanges and to interact with others <br>     ➢ listen to, incorporate and encourage feedback <br>     ➢ conduct oral presentations to a group, to consult participants and to answer questions <br>     ➢ manage and work with a group to construct an action plan <br>     ➢ chair meetings <br> • literacy skills to: <br>     ➢ categories and organize information <br>     ➢ assess information for relevance and accuracy |

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| | ➤ identify and elaborate on key agenda items and source additional information |
| | ➤ numeracy and time management skills to allow for sufficient meeting preparation |
| | ➤ Problem-solving skills to choose appropriate solutions from available options. |
| Resources Implication | Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices. |
| Methods of Assessment | Competence may be assessed through:<br>• Interview / Written Test<br>• Observation / Demonstration with Oral Questioning |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting. |

| Occupational Standard: Railway passenger Service Management Level V | |
|---|---|
| **Unit Title** | **Manage Quality Customer Service** |
| **Unit Code** | **EIS RPM5 04 0213** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to develop strategies to manage organisational systems that ensure services are delivered and maintained to standards agreed by the organisation.<br><br>Operators may have staff involved in delivering passenger service and are responsible for the quality of their work. In many instances the work will occur within the organisation's policies and procedures framework. At this level, the exercise of considerable discretion and judgement, using a range of problem solving and decision making strategies, will be required. |

| Elements | Performance Criteria |
|---|---|
| 1. Plan to meet passenger requirements | 1.1 The needs of *passengers* are investigated, identified, assessed, and included in planning processes.<br><br>1.2 Ensure plans to achieve the *quality*, time and cost specifications agreed with passengers. |
| 2. Ensure delivery of quality products and services | 2.1 Services are delivered to passenger specifications within organisation's business plan.<br><br>2.2 Team performance is monitored consistently to meet the organisation's quality and delivery standards.<br><br>2.3 Colleagues are assisted to overcome difficulty in meeting passenger service standards. |
| 3. Monitor, adjust and review passenger service | 3.1 *Strategies* are developed and used to monitor progress in achieving service targets and standards.<br><br>3.2 Strategies are developed and used to obtain passenger feedback to improve the provision of services.<br><br>3.3 *Resources* are developed, procured and used effectively to provide quality services to passengers.<br><br>3.4 Decisions are made to overcome problems and to adapt passenger services, service delivery in consultation with appropriate individuals and groups.<br><br>3.5 Records, reports and recommendations are managed within the organisation's systems and processes. |

| Variable | Range |
|---|---|
| Passengers | may be:<br>• clients, purchasers of services<br>• co-workers, peers and fellow frontline managers<br>• members of the general public who make contact with the organization, such as prospective purchasers of services<br>• potential funding bodies<br>• supervisors<br>• Suppliers of goods and services and contractors providing goods and services. |
| Quality | may refer to:<br>• Characteristics of a product, system, service or process that meet the requirements of passengers and interested parties. |
| Strategies | may refer to:<br>• databases and other controls to record and compare data over time<br>• electronic feedback mechanisms using intranet, internet and email<br>• feedback forms and other devices to enable communication from passengers<br>• long-term or short-term plans for monitoring achievement and evaluating effectiveness<br>• policies and procedures<br>• questionnaires, survey and interviews<br>• Training and development activities. |
| Resources | may include:<br>• buildings/facilities<br>• equipment<br>• finance<br>• information<br>• people<br>• power/energy<br>• technology<br>• Time. |

| Evidence Guide | |
|---|---|
| Critical Aspects of Competence | Demonstrates skills and knowledge in:<br>• plans, policies or procedures for delivering quality passenger service<br>• demonstrated techniques in solving complex passenger complaints and system problems that lead to poor passenger service<br>• Knowledge of techniques for solving complaints.<br>• problem solving skills to: |

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| | <ul><li>deal with passenger enquiries or complaints</li><li>deal with complex and non-routine difficulties</li><li>technology skills to select and use technology appropriate to a task</li></ul><ul><li>techniques for dealing with passengers, including passengers with specific needs</li></ul> |
| Underpinning Knowledge and Attitudes | Demonstrate knowledge in:<br><ul><li>key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:<ul><li>anti- discrimination legislation</li><li>Ethiopian consumer law</li><li>ethical principles</li><li>codes of practice</li><li>privacy laws</li><li>financial legislation</li><li>Occupational Health and Safety (OHS)</li></ul></li><li>organizational policy and procedures for passenger service including handling passenger complaints</li><li>service standards and best practice models</li><li>public relations and product promotion</li><li>techniques for dealing with passengers, including passengers with specific needs</li><li>techniques for solving complaints including the principles and techniques involved in the management and organization of:<ul><li>passenger behavior</li><li>passenger needs research</li><li>passenger relations</li><li>ongoing service quality</li><li>problem identification and resolution</li><li>quality passenger service delivery</li><li>record keeping and management methods</li><li>strategies for monitoring, managing and introducing ways to improve passenger service relationships</li><li>strategies to obtain passenger feedback</li></ul></li></ul> |
| Underpinning Skills | Demonstrates skills in:<br><ul><li>analytical skills to identify trends and positions of products and services</li><li>communication skills to:<ul><li>coach and mentor staff and colleagues</li><li>monitor and advise on passenger service strategies</li></ul></li><li>literacy skills to:<ul><li>edit and proofread texts to ensure clarity of meaning and accuracy of grammar and punctuation</li></ul></li></ul> |

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| | ➢ prepare general information and papers according to target audience |
| | ➢ read and understand a variety of texts |
| | • problem solving skills to: |
| |    ➢ deal with passenger enquiries or complaints |
| |    ➢ deal with complex and non-routine difficulties |
| |    ➢ technology skills to select and use technology appropriate to a task |
| | • self management skills to: |
| |    ➢ comply with policies and procedures |
| |    ➢ consistently evaluate and monitor own performance |
| |    ➢ Seek learning opportunities. |
| Resources Implication | Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices. |
| Methods of Assessment | Competence may be assessed through:<br>• Interview / Written Test<br>• Observation / Demonstration with Oral Questioning |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting. |

| Occupational Standard: Railway passenger Service Management Level V | |
|---|---|
| **Unit Title** | **Integrate Customer Contact Operations in the Organization** |
| **Unit Code** | **EIS RPM5 05 0213** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to integrate the passenger contact operations fully within the organisation and to ensure that they maintain a high profile and significance within the organisation. |

| Elements | Performance Criteria |
|---|---|
| 1. Identify and analyse interdependencies | 1.1 *Interdependencies* between contact centre and other departments are identified within the organisation. |
| | 1.2 The degree of interdependence is identified. |
| | 1.3 Map is developed about the flow of transactions and information between other departments and the contact centre. |
| 2. Analyse value and service chain and identify gaps | 2.1 *Value and service chain* model are developed. |
| | 2.2 *Stakeholders* are consulted regularly. |
| | 2.3 Data is collected to support chain continuity and gap identification. |
| | 2.4 Gaps in the value and service chain are identified. |
| 3. Prepare plan to close value and service chain gaps | 3.1 Service chain gaps are identified within the control of passenger contact operations. |
| | 3.2 Other gaps are communicated to stakeholders and relevant parties. |
| | 3.3 Activities and resources needed are identified to close gaps. |
| | 3.4 An action plan is prepared. |
| | 3.5 A review and feedback process is established. |
| | 3.6 Internal networks are developed to ensure sound communication across organisation. |
| 4. Integrate market intelligence capture into operations | 4.1 Consult with organisation marketing area or business unit. |
| | 4.2 Identify and agree on desired market intelligence. |
| | 4.3 Data collection is integrated into contact guidelines. |
| | 4.4 Data capture facilities are integrated into database. |
| | 4.5 Information is integrated into existing contact centre strategy and operations. |

| 5. Report market intelligence to other corporate departments | 5.1 Captured intelligence information is retrieved. |
| --- | --- |
| | 5.2 Market intelligence reports are prepared. |
| | 5.3 Information is communicated to relevant parties in an effective and timely manner. |

| Variable | Range |
| --- | --- |
| Interdependencies | may include:<br>• finance<br>• human resources operations<br>• resourcing<br>• Technology and infrastructure. |
| Value and service chain | may include:<br>• billing<br>• components of the enterprise infrastructure contributing directly to the supply of goods or services to the passenger<br>• credit<br>• passenger service<br>• field staff<br>• order fulfillment<br>• Sales support. |
| Stakeholders | may include:<br>• administration and support<br>• billing<br>• credit and collections<br>• marketing<br>• finance<br>• human resources<br>• strategy and planning<br>• Training. |

| Evidence Guide | |
| --- | --- |
| Critical aspects of Competence | Demonstrates skills and knowledge to:<br>• analyze interdependencies, and value and service chain<br>• prepare plans to close gaps in value and service chain<br>• integrate and report market intelligence within a passenger contact environment<br>• Demonstrate knowledge of compliance policies and requirements applicable to the organization. |
| Underpinning Knowledge and Attitudes | Demonstrate knowledge in:<br>• analytical methods and techniques, such as:<br>  ➢ Strengths, Weaknesses, Opportunities and Threats (SWOT)<br>  ➢ balanced scorecard |

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| | <ul><li>➤ Return On Investment (ROI)</li><li>➤ economic value added</li></ul><ul><li>compliance policies and requirements applicable to organization</li><li>corporate aims and objectives</li><li>market intelligence and data-gathering principles</li><li>information technology infrastructure, functionality and reporting capability</li><li>organizational communication methods</li><li>organizational structure and reporting lines, including key personnel required to effect change</li><li>principles of running effective meetings, and recording and distributing minutes</li><li>Risk assessment and management principles.</li></ul> |
| Underpinning Skills | Demonstrates skills in:<ul><li>analytical skills to:<ul><li>➤ analyze workplace information and data</li><li>➤ use observations of workplace tasks and interactions between people, their activities, equipment, environment and system</li></ul></li><li>communication skills to:<ul><li>➤ articulate ideas and information</li><li>➤ communicate effectively with personnel at all levels</li><li>➤ conduct effective formal and informal meetings</li></ul></li><li>consultation and negotiation skills to develop, implement and monitor strategies</li><li>interpersonal skills to:<ul><li>➤ establish rapport and build relationships with clients, team members and stakeholders</li><li>➤ establish relevant networks</li></ul></li><li>leadership skills to gain the trust and confidence of colleagues and stakeholders</li><li>literacy skills to develop reports that deal with complex ideas and concepts</li><li>numeracy skills to:<ul><li>➤ carry out statistical analysis</li><li>➤ manage budgetary resources</li></ul></li><li>planning and organizing skills to manage own tasks within required timeframes</li><li>problem solving skills to create innovative solutions to problems that arise</li><li>research skills to access relevant information and consider available options</li><li>risk assessment and management skills to fully consider impacts of existing or new activities</li></ul> |

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| | • self management skills to:<br>  ➢ comply with policies and procedures<br>  ➢ pay attention to detail when making observations and recording outcomes<br>  ➢ seek learning and development opportunities<br>• technology skills to organize, manage and analyze data |
| Resources Implication | Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices. |
| Methods of Assessment | Competence may be assessed through:<br>• Interview / Written Test<br>• Observation / Demonstration with Oral Questioning |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting. |

| Occupational Standard: Railway passenger Service Management Level V | |
|---|---|
| **Unit Title** | **Optimize Customer Contact Operations** |
| **Unit Code** | **EIS RPM5 06 0213** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to use data and statistical tools to monitor and optimise passenger contact processes.<br><br>Competence in this unit requires comprehensive knowledge of passenger contact operations, and the statistical tools and methodology required to optimise operations. |

| Elements | Performance Criteria |
|---|---|
| 1. Analyse passenger contact processes using statistical tools | 1.1 **Passenger contact processes** requiring analysis are identified.<br><br>1.2 The impact of these processes on **service levels** or other indicators is measured using statistical tools.<br><br>1.3 Tolerance levels are derived for processes.<br><br>1.4 Upper and lower control limits are calculated from data.<br><br>1.5 Reasons are investigated for performance outside of control limits. |
| 2. Rectify productivity impediments | 2.1 A qualitative and quantitative analysis of current **productivity** is conducted against organisational standards and aims.<br><br>2.2 Causes of productivity impediments are identified.<br><br>2.3 Service quality and quality management tools are applied to minimise impediments.<br><br>2.4 Confirm that operations achieve productivity standards. |
| 3. Conduct a process review | 3.1 Components of the process under review are identified.<br><br>3.2 Process is analysed and modified to achieve improved performance using **graphical techniques**.<br><br>3.3 Modified process is trailed and revised to meet organisational efficiency standards.<br><br>3.4 Revised process is documented using graphical techniques. |
| 4 Benchmark passenger contact operations | 4.1 Appropriate target areas are identified for process improvement.<br><br>4.2 **Benchmarking organisations** that demonstrate relevant best practice are researched and nominated.<br><br>4.3 Relevant best practice processes used by benchmarking organisations are documented. |

| | 4.4 Processes from benchmarking organisations that can be adopted are identified. |
| | 4.5 Relevant benefits and risks associated with implementing new processes are identified |
| | 4.6 Best practice processes are adapted to meet enterprise conditions |
| | 4.7 Appropriate performance indicators are identified and documented for evaluation of the new processes |

| Variable | Range |
|---|---|
| Passenger contact processes | may include:<br>• email and other electronic communications<br>• face-to-face contact<br>• facsimile and other written communications<br>• inbound and outbound telephone contact<br>• Service and sales support processes. |
| Service levels | may include:<br>• predetermined conditions for passenger contact service, including:<br>• contact duration<br>• contact wait time<br>• contact escalation policy<br>• percentage of calls answered within specified time period<br>• service guarantees<br>• Speed of response. |
| Productivity | may include:<br>• average speed of answer<br>• first call resolution<br>• measuring calls per day, week or hour<br>• measuring financial returns, sales volumes or services provided<br>• overall performance of the passenger contact operation<br>• Service level results. |
| Graphical techniques | may include:<br>• fishbone diagrams<br>• flowcharts<br>• Gantt or Pert charts<br>• maps<br>• Pareto charts. |
| Benchmarking organisations | may include:<br>• best practice organizations, which may be in an unrelated industry<br>• competitors |

| | • organizations in same industry |
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| | • Organizations with similar functions. |

| Evidence Guide | |
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| Critical aspects of Competence | Demonstrates skills and knowledge to:<br>• analyze statistical reports of contact centre process performance<br>• explain or demonstrate process improvement strategies<br>• analyze records of passenger contact productivity measures<br>• explain productivity improvement methodology<br>• Demonstrate knowledge of quality management and related process control methods.<br>• operating variables within passenger contact operations |
| Underpinning Knowledge and Attitudes | Demonstrate knowledge in:<br>• at least one complete suite of statistical control systems<br>• benchmarking principles<br>• passenger contact processes and the range of channels available<br>• passenger service principles and processes<br>• operating variables within passenger contact operations<br>• principles of statistics, statistical process control and underpinning statistical calculations<br>• process review and documentation principles<br>• project management principles<br>• quality management and related process control methods |
| Underpinning Skills | Demonstrates skills in:<br>• analytical skills to:<br>  ➢ analyze relevant workplace information and data<br>  ➢ make observations of workplace tasks and interactions between people, their activities, equipment, environment and systems<br>• communication skills to articulate information across all communication media<br>• consultation and negotiation skills to:<br>  ➢ develop plans<br>  ➢ implement and monitor designated actions<br>• interpersonal skills to:<br>  ➢ build relationships with clients, team members and stakeholders<br>  ➢ establish relevant internal and external networks<br>• leadership skills to gain the trust and confidence of colleagues and stakeholders<br>• numeracy skills to calculate, manipulate and validate data and statistics |

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|  | • planning and organizing skills to manage own tasks within required timeframes<br>• problem solving skills to create innovative solutions to problems<br>• project management skills to:<br>   ➢ achieve continuous improvement<br>   ➢ conduct action planning<br>• self management skills to:<br>   ➢ comply with policies and procedures<br>   ➢ seek learning and development opportunities<br>• technology skills to:<br>   ➢ access and use information and data<br>   ➢ produce reports and graphical representations |
| Resources Implication | Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices. |
| Methods of Assessment | Competence may be assessed through:<br>• Interview / Written Test<br>• Observation / Demonstration with Oral Questioning |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting. |

| Occupational Standard: Railway passenger Service Management Level V | |
|---|---|
| **Unit Title** | **Manage Customer Contact Information** |
| **Unit Code** | **EIS RPM5 07 0213** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to manage customer contact information and the Management Information Systems (MIS) used in a customer contact environment. |
| | Managers design specific implementation programs within these systems, including data collection, measurement types and patterns, and reporting strategies, as well as managing the use of information obtained. |
| | Competence in this unit requires using MIS to produce accurate and relevant information and reporting that support the efficient running of the centre or business unit. It also requires knowledge of the requirements to design, implement and tailor information systems to meet the changing needs of the environment. |

| Elements | Performance Criteria |
|---|---|
| 1. Select and set activity and transaction records and measurements | 1.1 ***Business plan*** and budget are analysed to identify relevant business information needs. |
| | 1.2 Possible ***contact pathways*** are identified. |
| | 1.3 Measurement methods and ***MIS*** used in each step are identified in contact pathway. |
| | 1.4 Information systems are configured to capture required measurements. |
| | 1.5 Testing procedures are developed and implemented for transaction and call/contact pathway measurements. |
| 2. Collect data | 2.1 Data-collection methods are identified in information technology systems used. |
| | 2.2 Quantitative and qualitative data collections are monitored to ensure accuracy. |
| | 2.3 Ensure data collection is segmented or sorted as required and provides the correct levels of information. |
| 3. Analyse MIS resulting from customer contact activities | 3.1 Call/contact traffic and transaction patterns, and other trends and activities are identified. |
| | 3.2 Correct data analysis methodologies are applied. |
| | 3.3 Data is accurately interpreted. |

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| 4. Prepare and present information | 4.1 *Stakeholders* are identified for contact centre information. |
| | 4.2 A contact centre information presentation is tailored for each stakeholder as appropriate. |
| | 4.3 Present both short- and long-term contact centre information system reports as required. |

| Variable | Range |
|---|---|
| Business plan | may include:<br>• action plans<br>• business objectives<br>• desired business outcomes<br>• financial or budgetary targets<br>• standards and guidelines<br>• Targets. |
| Contact pathways | may include:<br>• Automated Call Distribution (ACD) systems<br>• contact management systems<br>• email<br>• facsimile<br>• internal transfers and escalations<br>• Interactive Voice Response (IVR)<br>• letter<br>• telephone and Web based contacts. |
| MIS | may include:<br>• range of computer systems used in receiving, routing and reporting on contact centre communications traffic,<br>• data generating and data recording components of telephone, ACD and IVR systems<br>• Add-on systems that integrate with these systems. |
| Stakeholders | may include:<br>• centre staff<br>• management<br>• other internal departments<br>• own team<br>• Vendors and external contractors. |

| Evidence Guide | |
|---|---|
| Critical aspects of Competence | Demonstrates skills and knowledge in:<br>• develop, use, analyze and manage information systems to provide reliable and appropriate information and reporting to support the effective operation of a customer contact environment<br>• demonstrate knowledge of call and other contact traffic MIS |

| Underpinning Knowledge and Attitudes | Demonstrate knowledge in:<br>• budgetary requirements and principles<br>• business plans and objectives<br>• call and other contact traffic MIS<br>• meeting and minute taking principles<br>• methods of collecting reliable information and data and commonly encountered problems, and strategies for overcoming such problems<br>• organizational models and structures for managing customer contact information and the roles of key people<br>• principles of electronic information management and methods of reporting information<br>• reporting requirements and methodology |
|---|---|
| Underpinning Skills | Demonstrates skills in:<br>• analytical skills to interpret, report and recommend actions from complex data and information<br>• communication skills to:<br>  ➢ communicate effectively with personnel and clients at all levels<br>  ➢ conduct effective formal and informal meetings<br>• interpersonal skills to:<br>  ➢ establish rapport and build relationships with clients, team members and stakeholders<br>  ➢ develop and participate in relevant networks<br>• leadership skills to gain the trust and confidence of colleagues and clients<br>• numeracy skills to:<br>  ➢ manage budgetary resources<br>  ➢ read, validate and interpret data<br>• presentation skills to:<br>  ➢ articulate information and ideas clearly<br>  ➢ develop and present reports that deal with complex ideas and concepts<br>• problem solving skills to create innovative solutions to problems or challenges<br>• research and data-collection skills to conduct comprehensive and accurate reporting<br>• self management skills to:<br>  ➢ comply with policies and procedures<br>  ➢ pay attention to detail when making observations and recording outcomes<br>  ➢ seek learning and development opportunities<br>• technology skills to:<br>  ➢ organize and present data<br>  ➢ use information technology |

| Resources Implication | Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices. |
|---|---|
| Methods of Assessment | Competence may be assessed through:<br>• Interview / Written Test<br>• Observation / Demonstration with Oral Questioning |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting. |

| Occupational Standard: Railway passenger Service Management Level V | |
|---|---|
| **Unit Title** | **Design and Launch New Customer Contact Facilities** |
| **Unit Code** | **EIS RPM5 08 0213** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to design and establishes new customer contact facilities. |
| | Competence in this unit requires knowledge of the technology required, the human resources, the legislative and regulatory requirements – including Occupational Health and Safety (OHS) requirements, organisational standards and guidelines, and global best practice in design and features of customer contact facilities. |

| Elements | Performance Criteria |
|---|---|
| 1. Identify design elements | 1.1 Role and business needs of proposed customer contact facility are analysed. |
| | 1.2 General characteristics of customer contact facility are defined. |
| | 1.3 ***Design elements*** are identified to meet business needs. |
| | 1.4 Analysis is confirmed with ***stakeholders***. |
| 2. Develop detailed specifications | 2.1 Facility design principles are reviewed to confirm appropriateness of design. |
| | 2.2 Facility design elements are delegated appropriately to experienced specialist/s for detailed specification. |
| | 2.3 Benchmark facility design against world-class standards to demonstrate appropriateness of specifications. |
| | 2.4 Design specifications are confirmed with stakeholders. |
| 3. Evaluate resources | 3.1 Budgetary limits are identified for facility. |
| | 3.2 Suitable resources available from organisation's preferred suppliers are identified. |
| | 3.3 Suitable alternative resources and suppliers are identified for each design aspect. |
| | 3.4 Comparative analysis of each alternative is conducted. |
| | 3.5 Resources for each design aspect are recommended. |
| 4. Integrate design components | 4.1 Viable project management plan is prepared for the integration of new facility resources. |
| | 4.2 ***Project management tools*** are used throughout the integration process. |
| | 4.3 Contingency plans are prepared to meet all reasonable costs. |

| | 4.4 Effective **testing procedures and plans** are developed for all resources. |
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| | 4.5 Vigilance is maintained over budget, quality of supplied resources, and quality of work. |
| | 4.6 Progress and concerns arising are communicated to senior management in a timely way. |
| 5. Launch customer contact facility | 5.1 Viable project management plan is prepared for the **launch of the new customer contact facility**. |
| | 5.2 Project management tools are used throughout launch process. |
| | 5.3 Launch parameters are communicated to relevant stakeholders. |
| | 5.4 Pre- launch operational test procedures and launch plans are established. |
| | 5.5 Launch is supervised to completion according to plans and contingencies. |
| | 5.6 Launch and debrief stakeholders is reviewed to plan **follow-up actions**. |

| Variable | Range |
|---|---|
| Design elements | may include:<br>• customer service strategies<br>• external services, such as telecommunications<br>• human resources<br>• physical resources, including OHS considerations<br>• software<br>• Technology, including systems and telephony. |
| Stakeholders | may include:<br>• finance department<br>• human resources and OHS<br>• information technology department<br>• internal and external customers and vendors<br>• property and facilities department<br>• Senior management. |
| Project management tools | may include:<br>• communication and knowledge management applications<br>• costing applications<br>• quality control applications<br>• risk assessment and management applications<br>• scheduling applications<br>• Tracking applications. |

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| Testing procedures and plans | may include:<br>• development of test scenarios<br>• development of work instructions<br>• end to end testing of resources<br>• predetermined parameters for determining success or failure of testing<br>• regression testing ('what if' scenarios)<br>• remedial plan for unsuccessful test results<br>• schedule of testing in lead-up to opening<br>• stakeholder sign-off<br>• User acceptance testing. |
| Launch of the new customer contact facility | may include:<br>• adjusting systems to meet contingencies<br>• demonstrating new facilities and systems to stakeholders, including management, clients and staff<br>• initial use of new systems and facilities<br>• Transferring from existing systems to new systems. |
| Follow-up actions | may include:<br>• adjusting the overall design<br>• adjusting the set-up of specific resources<br>• Reporting to stakeholders, regardless of the degree of success of the launch. |

| Evidence Guide | |
|---|---|
| Critical Aspects of Competence | Demonstrates skills and knowledge in:<br>• design, project manager, implement and launch a new or significantly reengineered customer contact facility<br>• demonstrate knowledge of legislative, regulatory and organizational requirements that cover the task |
| Underpinning Knowledge and Attitudes | Demonstrate knowledge in:<br>• benchmarking methodology<br>• change management principles<br>• legislative, regulatory and organizational requirements for customer contact facilities<br>• principles of testing procedures and plans<br>• principles underpinning contact centre design at both the technology level and the human level, such as:<br>  ➢ emerging technologies<br>  ➢ ergonomics of office design<br>  ➢ hardware and telecommunications services<br>  ➢ software systems<br>• project management principles<br>• research methods using a range of information sources<br>• risk management principles |

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| | • sources of information, guidance and support for the project<br>• systems and physical resources used effectively in customer contact environments |
| Underpinning Skills | Demonstrates skills in:<br>• analytical skills to analyze relevant workplace information and data, and make recommendations accordingly<br>• communication skills to:<br>  ➤ conduct formal and informal meetings<br>  ➤ communicate with clients and personnel at all levels<br>• consultation and negotiation skills to develop, implement and monitor plans<br>• literacy skills to prepare reports containing complex ideas and concepts<br>• numeracy skills to:<br>  ➤ carry out analysis of statistics and data<br>  ➤ manage budgetary resources<br>• planning and organizing skills to manage own tasks within required timeframes<br>• presentation skills to:<br>  ➤ articulate information, expectations and ideas clearly<br>  ➤ research and present on complex issues, such as regulatory and legislative requirements<br>• project management skills to manage the complexities and scope of a large project<br>• risk assessment and management skills to understand the impacts and risks associated with the project<br>• self management skills to:<br>  ➤ comply with policies and procedures<br>  ➤ seek learning and development opportunities<br>• technology skills to manage data and information |
| Resources Implication | Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices. |
| Methods of Assessment | Competence may be assessed through:<br>• Interview / Written Test<br>• Observation / Demonstration with Oral Questioning |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting. |

| Occupational Standard: Railway passenger Service Management Level V | |
|---|---|
| **Unit Title** | **Develop and Maintain a Customer Contact Marketing Strategy** |
| **Unit Code** | **EIS RPM5 09 0213** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to develop, maintain and promote a marketing strategy in a customer contact environment. Competence in this unit requires developing, implementing and reviewing a marketing strategy, and building strong relationships with all stakeholders. The effective use and development of systems, databases and reporting tools are also required. |

| Elements | Performance Criteria |
|---|---|
| 1. Apply sales and marketing principles to contact centre performance | 1.1 A valid framework of sales and marketing principles are selected for a customer contact centre. |
| | 1.2 Consensus on sales and marketing principles is achieved with **stakeholders**. |
| | 1.3 Sales and marketing principles are integrated into customer contact operating objectives and strategies. |
| | 1.4 Elements of customer contact centre **supply chains** are identified. |
| | 1.5 Contact centre is promoted effectively to supply chain customers. |
| 2. Initiate, evaluate and maintain a marketing database system | 2.1 Appropriate **marketing database fields** and functions are identified. |
| | 2.2 Contribute to the development and testing of a marketing database. |
| | 2.3 Functionality of the marketing database is evaluated and enhanced to best serve the marketing operation. |
| | 2.4 Effective database maintenance procedures are established. |
| | 2.5 **Contingency planning** is established for failure of databases and systems. |
| 3. Develop and evaluate customer service and retention strategies | 3.1 Effective after sales support strategies is identified. |
| | 3.2 Strategies are developed to retain customers and to build loyalty. |
| | 3.3 Processes are established to facilitate **after sales support and customer retention strategies**. |
| | 3.4 Monitor and review after sales support and customer retention processes. |
| | 3.5 Processes are adjusted to optimise customer service and retention. |

| | 4.1 Sales and service report criteria relevant to the interests of stakeholders are identified. |
|---|---|
| 4. Analyse sales and customer activity results | 4.2 Sales and service data are analysed in relation to key performance indicators. |
| | 4.3 Report on performance and activity data to stakeholders in a timely manner. |

| Variable | Range |
|---|---|
| Stakeholders | may include:<br>• contact centre level:<br>   ➢ direct team<br>   ➢ team leaders<br>   ➢ other senior contact centre staff<br>• enterprise employees at management level with an interest or stake in contact centre operations, including:<br>   ➢ sales and marketing<br>   ➢ credit and collections<br>   ➢ billing<br>• external clients and suppliers with an interest in the marketing aspects of operations, including:<br>   ➢ contracting organizations<br>   ➢ recruitment suppliers<br>   ➢ Software and equipment suppliers. |
| Supply chains | may include:<br>• billing<br>• credit and collections<br>• customer service<br>• fulfillment area<br>• Sales and sales support. |
| Marketing database fields | may include:<br>• address: postal, business and residential<br>• contact numbers<br>• current products and services<br>• email address<br>• name<br>• occupation<br>• Previous offers. |
| Contingency planning | may include:<br>• activities to keep business running<br>• contact escalation policy<br>• Interactive Voice Response (IVR) message re reduced level of service |

| | • taking messages and calling customers back when systems are back in operation<br>• temporary redirection of calls to another area<br>• use of back-up systems or database<br>• Use of manual processes or recording. |
|---|---|
| After-sales support and customer retention strategies | may include:<br>• account management<br>• courtesy follow-up calls<br>• customer satisfaction surveying<br>• differentiated levels of customer service and support<br>• discounts or special offers<br>• follow-up to ensure customer satisfaction and loyalty post-sales experience<br>• loyalty programs<br>• Offers of value-added services or products. |

| **Evidence Guide** | |
|---|---|
| Critical aspects of Competence | Demonstrates skills and knowledge to:<br>• apply marketing principles to customer contact performance<br>• develop and maintain marketing databases<br>• develop customer service and retention strategies<br>• analyze and report performance within a customer contact environment<br>• demonstrate knowledge of sales and marketing principles |
| Underpinning Knowledge and Attitudes | Demonstrate knowledge in:<br>• contact centre information systems and the types of data and information available from these systems<br>• contingency planning principles<br>• customer retention strategies<br>• industry and marketplace/competitor marketing strategies<br>• information technology options and functionality within the customer contact centre environment<br>• process review and documentation processes<br>• sales and marketing principles<br>• Use and development of databases. |
| Underpinning Skills | Demonstrates skills in:<br>• analytical skills to:<br>  ➤ analyze workplace information and data<br>  ➤ assess compliance with relevant legislative, regulatory and organizational requirements<br>  ➤ consider all options and support the development of the strategy<br>• communication skills to:<br>  ➤ communicate effectively with personnel at all levels |

|  | ➢ conduct effective formal and informal meetings |
| | • consultation and negotiation skills to develop, implement and monitor strategies |
| | • interpersonal skills to: |
| | ➢ establish rapport and build relationships with internal and external customers, team members and stakeholders |
| | ➢ establish relevant networks |
| | • leadership skills to gain the trust and confidence of colleagues and clients |
| | • literacy skills to: |
| | ➢ prepare and present reports on complex concepts and ideas |
| | ➢ write policies, procedures and plans |
| | • numeracy skills to: |
| | ➢ manage budgetary resources |
| | ➢ understand, verify, manipulate and calculate data and statistics |
| | • planning and organizing skills to manage own tasks within required timeframes |
| | • presentation skills to articulate information and ideas effectively |
| | • problem solving skills to create innovative solutions to problems that arise |
| | • project management skills to: |
| | ➢ develop and implement the strategy successfully |
| | ➢ achieve ongoing continuous improvement |
| | • risk assessment and mitigation skills to fully understand and, if necessary, mitigate potential impacts of activities |
| | • self management skills to: |
| | ➢ comply with policies and procedures |
| | ➢ pay attention to detail when making observations and recording outcomes |
| | ➢ seek learning and development opportunities |
| Resources Implication | Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices. |
| Methods of Assessment | Competence may be assessed through: <br> • Interview / Written Test <br> • Observation / Demonstration with Oral Questioning |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting. |

| Occupational Standard: Railway passenger Service Management Level V | |
|---|---|
| **Unit Title** | **Manage Customer Contact Operational Costs** |
| **Unit Code** | **EIS RPM5 10 0213** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to manage costs in a customer contact environment. It requires the application of well-developed skills and knowledge in effective financial management and management of the budgetary process. |
| | Competence in this unit requires extensive knowledge of the industry and marketplace, well developed analytical and research skills, and the ability to work with data and statistics. |

| Elements | Performance Criteria |
|---|---|
| 1. Calculate cost for contact centre operations | 1.1 Cost-generating contact centre transactions are identified. |
| | 1.2 ***Transaction costs*** are calculated. |
| | 1.3 Clearly fixed and variable components of transaction costs are identified. |
| 2. Prepare budget for customer contact operation | 2.1 Accurate estimates of expected ***revenue*** supported by business and financial records are produced. |
| | 2.2 Expected ***operating expenses*** are identified based on realistic projections. |
| | 2.3 Proposed ***capital expenditure*** is identified based on business plans and estimates. |
| | 2.4 Work closely with ***stakeholders*** to identify factors that may influence operations and costs. |
| | 2.5 Justifiable high, low and expected budget scenarios are prepared. |
| 3. Present and justify budget | 3.1 Deliver an effective presentation of customer contact centre budget. |
| | 3.2 Aspects of operating expenses, revenues and capital expenditure are justified. |
| | 3.3 Qualitative information is introduced into justification when appropriate. |
| 4. Monitor budget performance | 4.1 ***Statistical performance*** of contact centre is correlated to budget estimates. |
| | 4.2 Variations between actual budget reporting and expected budget are closely monitored. |
| | 4.3 Accurate tracking of accrued, invoiced and other costs is maintained. |

| | 4.4 Cash flow implications are identified for current and planned events. |
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| | 4.5 Progress is communicated against budget to stakeholders. |
| 5. Control financial operations of the customer contact operation | 5.1 Reasonable threats are closely monitored to budget on a regular basis. |
| | 5.2 Variations are identified in contact centre performance that presents threats to financial performance. |
| | 5.3 Operational strategies are identified to minimise threats to budget. |
| | 5.4 Staff compliance is regularly monitored with financial delegation limits. |
| | 5.5 Organisation's **financial control systems** are regularly updated. |

| Variable | Range |
|---|---|
| Transaction costs | may include:<br>• unit cost per transaction, which may comprise:<br>• administration costs<br>• information technology costs<br>• incentive payment costs<br>• infrastructure costs<br>• staff costs<br>• support service costs and telecommunications services costs. |
| Revenue | may include:<br>• payments for outsourced services<br>• payments for services provided to organization<br>• performance incentives<br>• Sales and marketing incentives. |
| Operating expenses | may include:<br>• information technology costs<br>• labor costs<br>• recurring costs associated with operations<br>• rental for facilities<br>• repair and maintenance costs<br>• sales incentive payments<br>• stationery<br>• training and utility costs. |
| Capital expenditure | may include:<br>• expenditure on depreciating assets<br>• non-recurring costs<br>• purchase of equipment and infrastructure. |

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| Stakeholders | may include:<br>• back office support areas<br>• billing<br>• credit and collections<br>• executive<br>• finance<br>• marketing and sales<br>• regulatory<br>• strategy and planning<br>• Other service areas. |
| Statistical performance | may include:<br>• abandoned call data<br>• call volume and handling time data<br>• customer satisfaction data<br>• headcount and staffing data<br>• occupancy and adherence data<br>• overtime levels<br>• sales conversion rates, sales and service level data. |
| Financial control systems | may include:<br>• enterprise-specific methods and tools for tracking and managing costs<br>• financial delegation limits<br>• reporting templates<br>• System-generated reports and alerts. |

| Evidence Guide | |
|---|---|
| Critical Aspects of Competence | Demonstrates skills and knowledge in:<br>• analyze costs of operating customer contact operations<br>• prepare, justify and present the budget<br>• control and monitor the budget and comply with financial control systems<br>• demonstrate knowledge of budgeting principles |
| Underpinning Knowledge and Attitudes | Demonstrate knowledge in:<br>• accounting principles<br>• benchmarking principles<br>• budgeting principles<br>• cost-benefit analysis principles<br>• financial delegation policy of organization, financial control systems and requirements<br>• organizational business objectives and goals, including operational and business planning<br>• Risk assessment and management principles. |
| Underpinning Skills | Demonstrates skills in:<br>• analytical skills to: |

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| | <ul><li>➤ analyze workplace information and data</li><li>➤ use understanding of budget scenarios, sensitivities and threats</li><li>communication skills to:<ul><li>➤ communicate effectively with personnel at all levels</li><li>➤ conduct effective formal and informal meetings</li></ul></li><li>consultation and negotiation skills to develop, implement and monitor strategies</li><li>interpersonal skills to:<ul><li>➤ establish rapport and build relationships with clients, team members and stakeholders</li><li>➤ establish relevant networks</li></ul></li><li>literacy skills to prepare and present reports containing complex information, data and concepts</li><li>leadership skills to gain the trust and confidence of colleagues and stakeholders</li><li>numeracy skills to:<ul><li>➤ deal with the data and statistical information required to establish and monitor the budget</li><li>➤ manage budgetary resources</li></ul></li><li>planning and organizing skills to manage own tasks within required timeframes</li><li>presentation skills to articulate information and ideas effectively</li><li>problem solving skills to create innovative solutions to problems that arise</li><li>research skills to access relevant information and consider available options</li><li>risk assessment and mitigation skills to identify threats to the customer contact centre budget and to implement remedial actions</li><li>self management skills to:<ul><li>➤ comply with policies and procedures</li><li>➤ pay attention to detail when making observations and recording outcomes</li><li>➤ seek learning and development opportunities</li></ul></li><li>Technology skills to organize manage and analyze data.</li></ul> |
| Resources Implication | Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices. |
| Methods of Assessment | Competence may be assessed through:<ul><li>Interview / Written Test</li><li>Observation / Demonstration with Oral Questioning</li></ul> |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting. |

| Occupational Standard: Railway passenger Service Management Level V | |
|---|---|
| **Unit Title** | **Manage Customer Contact Centre Staffing** |
| **Unit Code** | **EIS RPM5 11 0213** |
| **Unit Descriptor** | This unit describes the performance outcomes, skills and knowledge required to maintain stable and productive staffing levels in a business unit within an organisation.<br><br>Competence in this unit requires broad management skills, including people management, as well as knowledge of recruitment, remuneration, incentive and compliance issues |

| Elements | Performance Criteria |
|---|---|
| 1. Develop and apply recruiting and staff retention strategies | 1.1 ***Job descriptions*** are developed and maintained for customer contact roles.<br><br>1.2 ***Position profiles*** are developed and maintained for customer contact roles.<br><br>1.3 Staff selection processes are applied using ***interviewing techniques***.<br><br>1.4 Critical ***churn factors*** are identified by analysing records of staff turnover and exit interviews.<br><br>1.5 Staff retention strategies are introduced to reduce churn. |
| 2. Manage induction and ongoing staff training | 2.1 Arrange for staff skill levels to be audited.<br><br>2.2 The identification of skill needs and skill gaps are arranged for all customer contact roles.<br><br>2.3 Distinguish between technology skill and customer service skill needs.<br><br>2.4 Training plans are developed to meet identified skill gaps.<br><br>2.5 Suitable sources of training support are identified.<br><br>2.6 Training programs are arranged to reduce skill gaps for all staff. |
| 3. Establish a performance management program | 3.1 ***Key Performance Indicators (KPIs)*** or competency sets are developed and maintained for all staff.<br><br>3.2 Agree on KPIs with each customer contact staff member.<br><br>3.3 Review dates and data collection are planned and maintained to enable performance management.<br><br>3.4 Performance reviews are conducted and personal development plans produced. |

| 4. Manage remuneration and incentive programs | 4.1 KPIs are determined for individuals and groups. |
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| | 4.2 Appropriate remuneration levels are set for job accountabilities and industry. |
| | 4.3 *Incentive schemes* are initiated using KPIs that are within the control of staff. |
| | 4.4 Remuneration and incentive schemes are regularly reviewed to ensure effectiveness. |
| | 4.5 Audit process is implemented to ensure integrity of programs. |
| 5. Manage compliance with statutory and regulatory requirements | 5.1 Personal and staff awareness of relevant statutory and regulatory requirements are maintained. |
| | 5.2 Ensure total compliance with statutory and regulatory requirements. |
| | 5.3 Breaches of *statutory and regulatory requirements* are identified, recorded and rectified. |
| | 5.4 Compliance training and review programs are implemented as required. |

| Variable | Range |
|---|---|
| Job descriptions | may include: <br> • accountabilities <br> • experience required <br> • qualifications required <br> • skills and knowledge required <br> • special requirements <br> • Specification of the duties for an individual employee. |
| Position profiles | may include: <br> • classification of roles <br> • remuneration levels <br> • set of competency statements to assist in defining the role <br> • Specification of dimensions of a position within an organizational structure. |
| Interviewing techniques | may include: <br> • competency and behavioral-based questions <br> • Fair recruitment practices. |
| Churn factors | may include: <br> • external factors, such as higher pay rates elsewhere <br> • lack of career progression <br> • lack of feedback <br> • lack of training <br> • leadership issues <br> • physical environment |

| | • recognition or reward<br>• Stress. |
|---|---|
| Key performance indicators | • adherence to roster<br>• availability<br>• average handling time<br>• call volumes<br>• quality<br>• retention<br>• relevant measures for specific roles<br>• sales<br>• sales conversion rates<br>• Seeking learning and development opportunities. |
| Incentive schemes | may include:<br>• commissions<br>• incentive payments<br>• non-cash rewards, such as time off<br>• remuneration adjustment<br>• Reward and recognition programs. |
| Statutory and regulatory requirements | may include:<br>• award and enterprise agreements<br>• national, state or territory legislative requirements, especially in regard to occupational health and safety<br>• industry-related codes and regulations, such as:<br>• Consumer Credit Code<br>• Privacy Act<br>• Trade Practices Act/Competition and Consumer Act |

| **Evidence Guide** | |
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| Critical Aspects of Competence | Demonstrates skills and knowledge in:<br>• manage a business unit, encompassing:<br>  ➢ compliance with relevant legislation, regulations and codes<br>  ➢ induction<br>  ➢ management of remuneration and incentive programs<br>  ➢ performance management<br>  ➢ recruitment and training<br>• Demonstrate knowledge of legislative, regulatory and organizational policy framework. |
| Underpinning Knowledge and Attitudes | Demonstrate knowledge in:<br>• employee and industrial relations principles<br>• equal employment opportunity guidelines<br>• interviewing principles<br>• legislative, regulatory and organizational policy framework<br>• organizational recruitment process, including role definition, selection criteria, direct and indirect assessment processes |

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| | • range of reward and recognition strategies and initiatives<br>• skill auditing and training gap analysis methodologies<br>• strategies for the development of a positive compliance culture<br>• succession planning principles<br>• Training program design principles. |
| Underpinning Skills | Demonstrates skills in:<br>• analytical skills to:<br>  ➢ analyze relevant workplace information and data<br>  ➢ make observations of workplace tasks and interaction between people, their activities, equipment, environment and systems<br>• consultation and negotiation skills to:<br>  ➢ collate and record information<br>  ➢ communicate effectively verbally and in writing<br>  ➢ develop and implement plans<br>• interpersonal skills to:<br>  ➢ establish rapport and build relationships with customers, team members and stakeholders<br>  ➢ establish relevant networks<br>  ➢ interviewing and recruitment skills to arrive at effective selection outcomes<br>• literacy skills to:<br>  ➢ articulate information and ideas clearly<br>  ➢ prepare and present reports and presentations containing complex ideas and concepts<br>  ➢ write policies, procedures and plans<br>• numeracy skills to:<br>  ➢ carry out analysis and validation of data and information<br>  ➢ manage budgetary resources<br>• planning and organizing skills to manage own tasks within required timeframes<br>• problem solving skills to find innovative solutions to problems<br>• self management skills to:<br>  ➢ comply with policies and procedures<br>  ➢ seek learning and development opportunities<br>• Technology skills to manage and analyze data and information. |
| Resources Implication | Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices. |
| Methods of Assessment | Competence may be assessed through:<br>• Interview / Written Test<br>• Observation / Demonstration with Oral Questioning |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting. |

| Occupational Standard: Railway passenger Service Management Level V | |
|---|---|
| **Unit Title** | **Manage Project Quality** |
| **Unit Code** | **EIS RPM5 12 0213** |
| **Unit Descriptor** | This unit specifies the outcomes required to manage quality within projects. It covers determining quality requirements, implementing quality assurance processes, and using review and evaluation to make quality improvements in current and future projects. |

| Elements | Performance Criteria |
|---|---|
| 1. Determine quality requirements | 1.1 ***Quality objectives***, standards and levels are determined, with input from stakeholders and guidance of a higher project authority, to establish the basis for quality outcomes and a ***quality management plan***. |
| | 1.2 Established ***quality management methods, techniques and tools*** are selected and used to determine preferred mix of quality, capability, cost and time. |
| | 1.3 Quality criteria are identified, agreed with a higher project authority and communicated to stakeholders to ensure clarity of understanding and achievement of quality and overall project objectives. |
| | 1.4 Agreed quality requirements are included in the project plan and implemented as basis for performance measurement. |
| 2. Implement quality assurance | 2.1 Results of project activities and product performance are measured and documented throughout the project life cycle to determine compliance with agreed quality standards. |
| | 2.2 Causes of unsatisfactory results are identified, in consultation with the client, and appropriate actions are recommended to a higher project authority to enable continuous improvement in quality outcomes. |
| | 2.3 Inspections of quality processes and ***quality control*** results are conducted to determine compliance of quality standards to overall quality objectives. |
| | 2.4 A quality management system is maintained to enable effective recording and communication of quality issues and outcomes to a higher project authority and stakeholders. |
| 3. Implement project quality improvements | 3.1 Processes are reviewed and agreed changes implemented continually throughout the project life cycle to ensure continuous improvement to quality. |
| | 3.2 Project outcomes are reviewed against performance criteria to determine the effectiveness of quality management processes and procedures. |

| | 3.3 Lessons learned and recommended *improvements* are identified, documented and passed on to a higher project authority for application in future projects. |
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| Variable | Range |
|---|---|
| Quality objectives | may include:<br>• requirements from the client and other stakeholders<br>• requirements from a higher project authority<br>• negotiated trade-offs between cost, schedule and performance<br>• those quality aspects which may impact on customer satisfaction |
| Quality management plan | may include:<br>• established processes<br>• authorizations and responsibilities for quality control<br>• quality assurance<br>• continuous improvement |
| Quality management methods, techniques and tools | may include:<br>• brainstorming<br>• benchmarking<br>• charting processes<br>• ranking candidates<br>• defining control<br>• undertaking benefit/cost analysis<br>• processes that limit and/or indicate variation<br>• control charts<br>• flowcharts<br>• histograms<br>• pare to charts<br>• scatter gram<br>• run charts |
| Quality control | May include:<br>• monitoring conformance with specifications<br>• recommending ways to eliminate causes of unsatisfactory<br>• performance of products or processes<br>• monitoring of regular inspections by internal or external agents |
| Improvements | May include:<br>• formal practices, such as total quality management or continuous improvement<br>• improvement by less formal processes which enhance both the product quality and processes of the project, for example client surveys to determine client satisfaction with project team performance |

| **Evidence Guide** | |
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| Critical Aspects of Competence | • A person who demonstrates competence in this unit must be able to provide evidence that they have taken responsibility for quality management of projects. This will include evidence of managing the work of others within the project team with respect to quality.<br>• Products that could be used as evidence include:<br>• documentation produced in managing projects such as:<br>  ➢ lists of quality objectives, standards, levels and measurement criteria<br>  ➢ records of inspections, recommended rectification actions and quality outcomes<br>  ➢ management of quality management system and quality management plans<br>  ➢ application of quality control, quality assurance and continuous improvement processes<br>  ➢ records of quality reviews<br>  ➢ lists of lessons learned and recommended improvements<br><br>• Processes that could be used as evidence include:<br>  ➢ how quality requirements and outcomes were determined for projects<br>  ➢ how quality tools were selected for use in projects<br>  ➢ how team members were managed throughout projects with respect to quality within the project<br>  ➢ how quality was managed throughout projects<br>  ➢ how problems and issues with respect to quality and arising during projects were identified and addressed<br>  ➢ how projects were reviewed with respect to quality management<br>  ➢ how improvements to quality management of projects have been acted upon |
| Underpinning Knowledge and Attitudes | Broad knowledge and understanding of:<br>• the principles of project quality management and their application<br>• acceptance of responsibilities for project quality management<br>• use of quality management systems and standards<br>• the place of quality management in the context of the project life cycle<br>• appropriate project quality management methodologies; and their capabilities, limitations, applicability and contribution to project outcomes<br>• attributes:<br>  ➢ analytical<br>  ➢ attention to detail |

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| | ➢ able to maintain an overview<br>➢ communicative<br>➢ positive leadership |
| Underpinning Skills | Demonstrate skills of:<br>• ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities<br>• project management<br>• quality management<br>• planning and organizing<br>• communication and negotiation<br>• problem-solving<br>• leadership and personnel management<br>• monitoring and review skills |
| Resources Implication | Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices. |
| Methods of Assessment | Competence may be assessed through:<br>• Interview / Written Test<br>• Observation / Demonstration with Oral Questioning |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting. |

| Occupational Standard: Railway passenger Service Management Level V ||
|---|---|
| **Unit Title** | **Facilitate and Capitalize on Change and Innovation** |
| **Unit Code** | **EIS RPM5 13 0213** |
| **Unit Descriptor** | This unit specifies the outcomes required to plan and manage the introduction and facilitation of change; particular emphasis is on the development of creative and flexible approaches, and on managing emerging opportunities and challenges. |

| Elements | Performance Criteria |
|---|---|
| 1. Participate in planning the introduction and facilitation of change | 1.1 *Manager* contributes effectively to the organization's planning processes to introduce and facilitate change. |
| | 1.2 Plans are made to introduce change in consultation with *appropriate stakeholders*. |
| | 1.3 Organization's objectives and plans are communicated effectively to introduce change to individuals and teams. |
| 2. Develop creative and flexible approaches and solutions | 2.1 Variety of approaches are identified and analyzed to manage workplace issues and problems. |
| | 2.2 *Risks* are identified and assessed, and action initiated to manage these to achieve a recognized benefit or advantage to the organization. |
| | 2.3 Workplace is managed in a way which promotes the development of innovative approaches and outcomes. |
| | 2.4 Creative and responsive approaches to resource management improve productivity and services, and/or reduce costs. |
| 3. Manage emerging challenges and opportunities | 3.1 Individuals and teams are supported to respond effectively and efficiently to changes in the organization's goals, plans and priorities. |
| | 3.2 Coaching and mentoring are made to assist individuals and teams to develop competencies to handle change efficiently and effectively. |
| | 3.3 Opportunities are identified and taken as appropriate, to make adjustments and to respond to the changing needs of customers and the organization. |
| | 3.4 *Information needs* of individuals and teams are anticipated and facilitated as part of change implementation and management. |

| | 3.5 Recommendations for improving the methods and techniques to manage change are identified, evaluated and negotiated with appropriate individuals and groups. |
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| Variables | Range |
|---|---|
| Manager | • a person with frontline management roles and<br>• responsibilities, regardless of the title of their position |
| Appropriate stakeholders | may refer to:<br>• those individuals and organizations who have a stake in the change and innovation being planned, including:<br>• organization directors and other relevant managers<br>• teams and individual employees who are both directly and indirectly involved in the proposed change<br>• union/employee representatives or groups<br>• OHS committees<br>• other people with specialist responsibilities<br>• external stakeholders where appropriate - such as clients, suppliers, industry associations, regulatory and licensing agencies |
| Risks | may refer to:<br>• any event, process or action that may result in goals and objectives of the organization not being met<br>• any adverse impact on individuals or the organization<br>• various risks identified in a risk management process |
| Information needs | may include:<br>• new and emerging workplace issues<br>• implications for current work roles and practices including training and development<br>• changes relative to workplace legislation, such as OHS, workplace data such as productivity, inputs/outputs and future projections<br>• planning documents<br>• reports<br>• market trend data<br>• scenario plans<br>• customer/competitor data |

| Evidence Guide | |
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| Critical Aspects of Competence | Assessment must show evidence that the candidate:<br>• Planning the introduction and facilitation of change<br>• Developing creative and flexible approaches and solutions<br>• Managing emerging challenges and opportunities |

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| Underpinning Knowledge and Attitudes | Demonstrate knowledge of:<br>• Relevant legislation from all levels of government that affects business operation, especially in regard to occupational health and safety and environmental issues, equal opportunity, industrial relations and anti-discrimination<br>• the principles and techniques involved in:<br>• change and innovation management<br>• development of strategies and procedures to implement and facilitate change and innovation<br>• use of risk management strategies: identifying hazards,<br>• assessing risks and implementing risk control measures<br>• problem identification and resolution<br>• leadership and mentoring techniques<br>• management of quality customer service delivery<br>• consultation and communication techniques<br>• record keeping and management methods<br>• the sources of change and how they impact<br>• factors which lead/cause resistance to change<br>• approaches to managing workplace issues |
| Underpinning Skills | Demonstrate skills on:<br>• Communication skills<br>• Planning work<br>• Managing risk |
| Resources Implication | Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices. |
| Methods of Assessment | Competence may be assessed through:<br>• Interview / Written Test<br>• Observation / Demonstration with Oral Questioning |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting. |

| Occupational Standard: Railway passenger Service Management Level V | |
|---|---|
| **Unit Title** | **Establish and Conduct Business Relationships** |
| **Unit Code** | **EIS RPM5 14 0213** |
| **Unit Descriptor** | This unit covers the skills, attitudes and knowledge required to manage business relationship with customers. |

| Elements | Performance Criteria |
|---|---|
| 1. Establish contact with customer | 1.1 Welcoming customer environment is maintained. |
| | 1.2 Customer is greeted warmly according to enterprise policies and procedures. |
| | 1.3 Effective service environment is created through verbal and non-verbal presentation according to enterprise policies and procedures. |
| | 1.4 Customer data is maintained to ensure database relevance and currency. |
| | 1.5 Information on customers and service history is gathered for analysis. |
| | 1.6 ***Opportunities*** to maintain regular contact with customers are identified and taken up. |
| 2. Clarify needs of customer | 2.1 Customer needs are determined through questioning and active listening. |
| | 2.2 Customer needs are accurately assessed against the products/services of the enterprise. |
| | 2.3 Customer details are documented clearly and accurately in required format. |
| | 2.4 Negotiations are conducted in a business-like and professional manner. |
| | 2.5 Maximize benefits for all parties in the negotiation through use of established ***negotiation techniques*** and in the context of establishing long term relationships. |
| | 2.6 The results of negotiations are communicated to appropriate colleagues and stakeholders within appropriate timeframes. |
| 3. Provide information and advice | 3.1 Features and benefits of products/services provided by the enterprise are described / recommended to meet customer needs. |
| | 3.2 Information is provided to satisfy customer needs. |
| | 3.3 Alternative sources of information/advice are discussed with the customer. |

| 4. Foster and maintain business relationships | 4.1 Pro-actively seek, review and act upon information needed to maintain sound business relationships. |
| | 4.2 Agreements are honored within the scope of individual responsibility. |
| | 4.3 Adjustments to agreements are made in consultation with the customer and share information with appropriate colleagues. |
| | 4.4 Nurture relationships through regular contact and use of effective interpersonal and communication styles. |

| Variable | Range |
| --- | --- |
| Opportunities to maintain regular contact with customers | may include:<br>• informal social occasions<br>• industry functions<br>• association membership<br>• co-operative promotions<br>• program of regular telephone contact |
| Negotiation techniques | • identification of goals, limits<br>• clarification of needs of all parties<br>• identifying points of agreement and points of difference<br>• preparatory research of facts<br>• active listening and questioning<br>• non-verbal communication techniques<br>• appropriate language<br>• bargaining<br>• developing options<br>• confirming agreements<br>• appropriate cultural behavior |

| Evidence Guide | |
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| Critical Aspects of Competence | It is essential that competence is fully observed and there is ability to transfer competence to changing circumstances and to respond to unusual situations in the critical aspects of:<br>• consistently applying enterprise policies and procedures and industry codes of practice in regard to customer service<br>• providing a quality service environment by treating customers in a courteous and professional manner through all stages of the procedure<br>• using effective questioning/active listening and observation skills to identify customer needs<br>• communicating effectively with others involved in or affected by the work |

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|---|---|
| | • maintaining relevant and current customer databases in accordance with enterprise policies and procedures<br>• ability to build and maintain relationships to achieve successful business outcomes |
| Underpinning Knowledge and Attitudes | Demonstrate knowledge of:<br>• Operational knowledge of enterprise policies and procedures in regard to:<br> ➢ customer service<br> ➢ dealing with difficult customers<br> ➢ maintenance of customer databases<br> ➢ allocated duties/responsibilities<br> ➢ General knowledge of the range of enterprise merchandise and services, location of telephone extensions and departments/sections<br>• Basic operational knowledge of legislation and statutory requirements, including consumer law, trade practices and fair trading legislation<br>• Basic operational knowledge of industry/workplace codes of practice in relation to customer service<br>• negotiation and communication techniques appropriate to negotiations that may be of significant commercial value |
| Underpinning Skills | Demonstrate skills of:<br>• Use workplace technology related to use of customer database<br>• Collect, organize and understand information related to collating and analyzing customer information to identify needs<br>• Communicate ideas and information<br>• Plan and organize activities concerning information for database entries<br>• Use mathematical ideas and techniques to plan database cells and size<br>• Establish diagnostic processes which identify and recommend improvements to customer service |
| Resources Implication | Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices. |
| Methods of Assessment | Competence may be assessed through:<br>• Interview / Written Test<br>• Observation / Demonstration with Oral Questioning |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting. |

| Occupational Standard: Railway passenger Service Management Level V | |
|---|---|
| **Unit Title** | **Manage Continuous Improvement Process (Kaizen)** |
| **Unit Code** | **EIS RPM5 15 0213** |
| **Unit Descriptor** | This unit describes the performance, outcomes, knowledge, attitude and skills required to sustain and develop an environment in which continuous improvement, innovation and learning are promoted, rewarded and managed. |

| Elements | Performance criteria |
|---|---|
| 1. Diagnose the current status. | 1.1 ***Parameters*** used for study current situation are obtained. |
| | 1.2 Internal and external environment is analyzed. |
| | 1.3 Problems related to targeted environment is recognized and identified. |
| | 1.4 Problems regarding to current situation are analyzed. |
| | 1.5 Alternatives are generated. |
| | 1.6 Best alternatives are selected. |
| 2. Design an effective continuous improvement process (kaizen). | 2.1 The values, mission and goals of kaizen management system are clarified. |
| | 2.2 The ***kaizen management template*** and a visual management logo full of purpose and meaning are developed. |
| | 2.3 A clear action strategy (master and detailed plans) is defined. |
| | 2.4 The most effective and proven ***kaizen tools*** are chosen and applied. |
| | 2.5 A practical way is identified to involve all employees in ***Gemba activities*** (top, middle and bottom). |
| 3. Develop change capability. | 3. 1. Kaizen Promotion Team Structure is developed. |
| | 3. 2. The Kaizen Training Plan is defined and started. |
| | 3. 3. Supervisors' kaizen capability and habits are developed. |
| | 3. 4. Key people are developed in terms of ***Individual leadership capability***. |
| 4. Implement improved processes. | 4.1 ***Sustainability/continuous improvement*** are promoted as an essential part of doing business. |
| | 4.2 Impacts of change and consequences are addressed for people, and transition plans implemented. |

| | 4.3 Objectives, time frames, measures and communication plans are ensured in place to manage implementation. |
|---|---|
| | 4.4 Contingency plans are implemented in the event of non-performance. |
| | 4.5 Failure is followed-up by prompt investigation and analysis of causes. |
| | 4.6 Emerging challenges and opportunities are managed effectively. |
| | 4.7 Continuous improvement systems and processes are evaluated regularly. |
| | 4.8  Improvements are communicated to all relevant groups and individuals. |
| | 4.9 Opportunities are explored for further development of value stream improvement processes. |
| 5.  Establish direction and control. | 5.1 A *system audit tool* is defined and implemented. |
| | 5.2 The kaizen management system is deployed across all company levels and functions. |
| | 5.3 Results are checked and corrections made. |
| | 5.4 *Standard operating procedures* are developed and maintained. |
| | 5.5 The recruit, training and evaluation systems are improved and *HR practices* compensated. |


| Variable | Range |
|---|---|
| Parameters | May include but not limited to:<br>• Working condition<br>• Resources may include:<br> ➢ Human<br> ➢ Material<br> ➢ Machine<br>• Kaizen elements |
| Kaizen management template | May include but not limited to:<br>• Visual management board for:<br> ➢  displaying characteristic figures, data and graphics<br> ➢ depicting and controlling processes<br> ➢ identifying and marking sources of risks, setting and standards<br> ➢ displaying company's values and goals of kaizen |
| Kaizen tools | May include but not limited to:<br>• 5S (a visual workplace management) |

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| | • 7 QC tools( Cause and Effect Diagram, Check Sheet , Pareto Diagram , Histogram, Scatter Diagram,  Control Chart and Flow Chart )<br>• Brainstorming<br>• Basic Industrial Engineering (IE) tools such as time study, motion study, line balancing, work sampling<br>• JIT(JUST IN TIME principles)<br>• MUDA identification and elimination tools<br>• Kanban<br>• Poka-yoke<br>• Takt- time |
| Gemba activities | May include but not limited to:<br>• Value-adding activities to satisfy the customer<br>• Employee autonomous operations (participating in team to identify nonconformity, propose solutions and implement them autonomously) |
| Individual leadership capability | May include but not limited to:<br>• Personal and interpersonal skills<br>• Courage<br>• Honour and integrity<br>• Energy and drive<br>• Strategic skills<br>• Operating skills<br>• Organizational positioning skills |
| Sustainability/continuous improvement | May include but not limited to:<br>• Improvements made by following PDCA (Plan, Do, Check and Act) cycle for:<br>  ➢ Improvements in one's own work<br>  ➢ Saving in energy, material and other resources<br>  ➢ Improvements in the working environment<br>  ➢ Improvements in machines and processes<br>  ➢ Improvements in jigs and tools<br>  ➢ Improvement in office work<br>  ➢ Improvements in product quality<br>  ➢ Ideas for new products<br>  ➢ Customers services and customer relations |
| System audit tool | May include but not limited to:<br>• 5S audit<br>• Patrol system<br>• Kaizen board<br>• 5M check lists<br>• Key Performance Indicators (KPIs) |
| Standard operating procedure | May include but not limited to:<br>• Administrative standards for: |

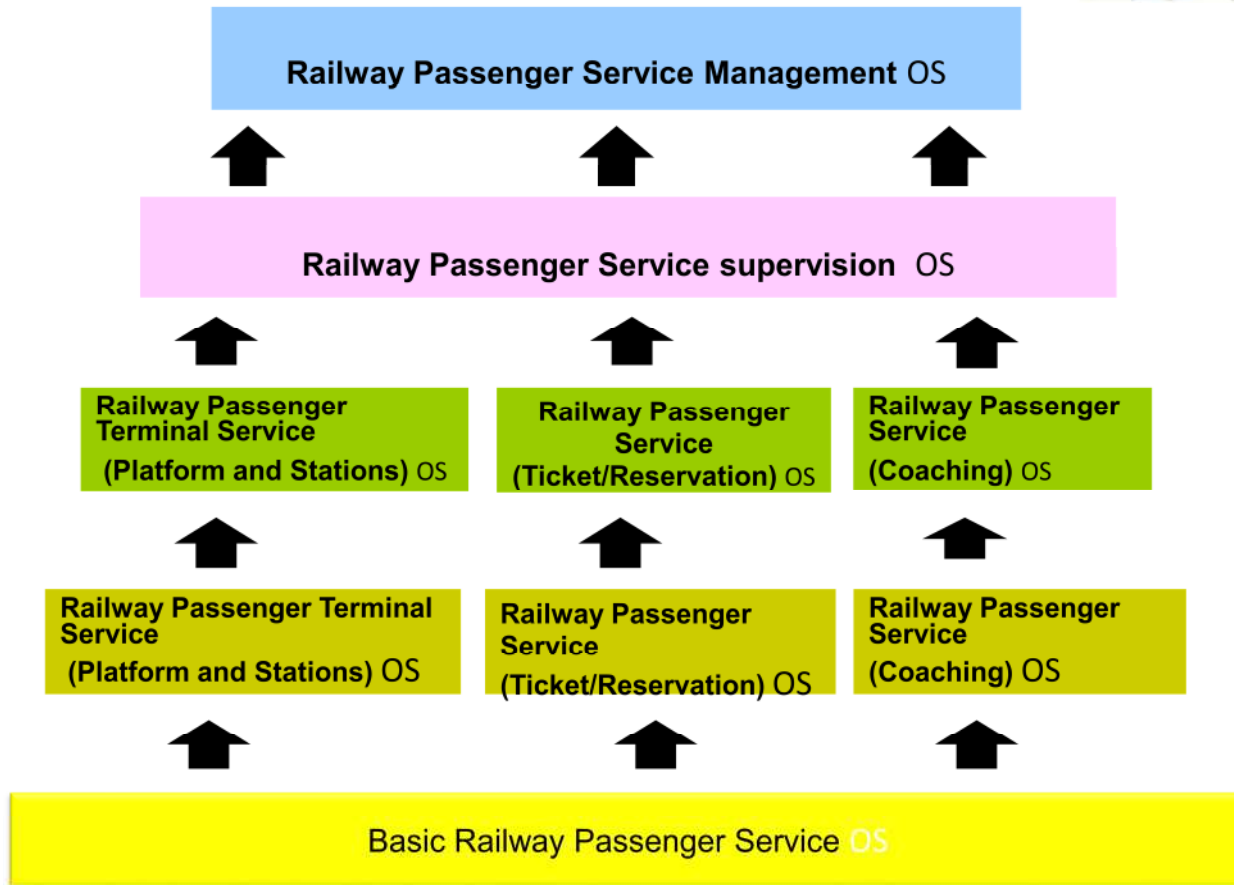| | |
|---|---|
| | <ul><li>Managing the business</li><li>Administration</li><li>Personnel Guidelines</li><li>Job Descriptions</li><li>Guidelines for preparing cost information</li></ul><ul><li>Operation standards for:<ul><li>Describing the way a job is done.</li><li>Help realising Quality, cost, delivery.</li><li>Addressing the need to satisfy customers.</li><li>Using the process that's the best.</li><li>Producing work in the most cost effective manner.</li><li>Assuring total quality for the customer.</li></ul></li></ul> |
| HR practices | May include but not limited to:<ul><li>Resources may include:<ul><li>Recruit and retain high quality people with innovative skills and a good track, record in innovation</li></ul></li><li>HR development is used for:<ul><li>strategic capability and provide encouragement and facilities for enhancing innovating skills and enhancing the intellectual capital of the organization</li></ul></li><li>Reward will:<ul><li>Provide financial incentives and rewards and recognition for successful innovation</li></ul></li></ul> |

| Evidence Guide | |
|---|---|
| Critical Aspects of Assessment | Demonstrates skills and knowledge competencies to:<ul><li>Establish policy and cross-functional goals for kaizen</li><li>Deploy and implement goals as directed through policy deployment and cross-functional management.</li><li>Realize goals through deployment and audits.</li><li>Build systems, procedures, and structures conducive to kaizen.</li><li>Use kaizen in functional capabilities.</li><li>Introduce Kaizen as a corporate strategy</li><li>Provide support and direction between allocating resources</li><li>Establish, maintain and upgrade standards.</li><li>Make employees conscious through training programs.</li><li>Assist employees develop skills and tools for problem solving.</li></ul> |
| Underpinning Knowledge and Attitude | Demonstrates knowledge of:<ul><li>Quality management and continuous improvement theories</li><li>creativity/innovation theories/concepts</li><li>competitive systems and practices tools, including:<ul><li>5S</li><li>JUST IN Time (JIT)</li></ul></li></ul> |

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|---|---|
| | ➢ mistake proofing<br>➢ process mapping<br>➢ establishing customer pull<br>➢ setting of KPIs/metrics<br>➢ SOP<br>➢ Kaizen elements/targets.<br>➢ identification and elimination of waste/MUDA<br>➢ continuous improvement processes including implementation, monitoring and evaluation strategies for a whole organization and its value stream<br>➢ Difference between breakthrough improvement and continuous improvement<br>➢ organizational goals, processes and structure<br>➢ approval processes within organization<br>➢ methods of determining the impact of a change<br>➢ customer perception of value<br>➢ Define, Measure, Analyze, Improve and Control (DMAIC) to sustain process |
| Underpinning Skills | Demonstrates Skills to:<br>• Use leadership skills to foster a commitment to quality and openness to improvement.<br>• Analyze training needs and implementing training programs<br>• Prepare and maintain quality and audit documentation<br>• Undertake self-directed problem solving and decision-making on issues of a broad and/or highly specialized nature and in highly varied and/or highly specialized contexts<br>• Communicate at all levels in the organization and to audiences of different levels of literacy and numeracy<br>• Analyze current state/situation of the organization.<br>• Analyze individually and collectively the implementation of competitive systems and practices tools in the organization and determining strategies for improved implementation<br>• Solve highly varied and highly specialized problems related to competitive systems and practices implementation and continuous improvement to root cause<br>• Negotiate with stakeholders, where required, to obtain information required for implementation and refinement of continuous improvements, including management, unions, employees and members of the community.<br>• Review relevant metrics, including all those measures which might be used to determine the performance of the improvement system, including:<br>  ➢ Key Performance Indicators (KPIs) for existing processes<br>  ➢ Quality statistics |

| | |
|---|---|
| | ➢ Delivery timing and quantity statistics<br>➢ Process/equipment reliability ('uptime') |
| Resources Implication | Access is required to real or appropriately simulated situations, including work areas, materials and equipment, and to information on workplace practices and OHS practices. |
| Methods of Assessment | Competence may be assessed through:<br>• Interview / Written Test<br>• Observation / Demonstration with Oral Questioning |
| Context of Assessment | Competence may be assessed in the work place or in a simulated work place setting. |

# Railway Passenger Services

**Railway Passenger Service Management** OS

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**Railway Passenger Service supervision** OS

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**Railway Passenger Terminal Service (Platform and Stations)** OS

**Railway Passenger Service (Ticket/Reservation)** OS

**Railway Passenger Service (Coaching)** OS

↑ ↑ ↑

**Railway Passenger Terminal Service (Platform and Stations)** OS

**Railway Passenger Service (Ticket/Reservation)** OS

**Railway Passenger Service (Coaching)** OS

↑ ↑ ↑

Basic Railway Passenger Service OS

# Acknowledgement

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This occupational standard was developed on February 2013 at Ethiopian Red Cross training center (ERTC) Addis Ababa.

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## COMMENT TEMPLATE

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