

# Technical Supervisor Requirements



Money &  
Pensions  
Service

#### **14. Technical Supervision Requirement – Telephone and Digital Advice provision**

- 14.1. Technical Supervision is a set of activities to support Debt Advisers in their roles and ensure that the Debt Advice provided to Clients is accurate, effective and tailored to the individuals' circumstances.
- 14.2. Technical Supervision activities can be provided in various forms by a set of individuals / teams.
- 14.3. Technical Supervision activity will include:
- 14.3.1. call listening during or after advice sessions;
  - 14.3.2. undertaking transcript/cases reviews;
  - 14.3.3. identifying advisers' soft skill and technical training needs; and,
  - 14.3.4. providing constructive feedback to advisers and relevant roles.
- 14.4. Technical supervision activity may also include:
- 14.4.1. providing real time support to advisers, which will include but is not limited to providing; guidance in complex matters; and
  - 14.4.2. providing advisers with sources of information.
- 14.5. The Recipient will provide prior to the commencement of this Deed, detailed information on how the Recipient will ensure that Debt Advisers are developed, supervised and supported in the Recipient's Project Plan.
- 14.6. The Recipient will have an internal Quality and Performance Management Policy (or a similar policy) in place to document their supervisory activities. A copy of the Quality and Performance Policy will be provided to the Grantor prior to the commencement of this Deed. To this effect, the Recipient should outline as a minimum, but not limited to:
- 14.6.1. frequency of activities e.g. call listening, transcript checking;
  - 14.6.2. volume of these activities e.g. per adviser, per quarter / month, including details of any risk-based modelling applied;
  - 14.6.3. how the supervisory activities are undertaken to ensure consistency e.g.using outcome focussed call and webchat score cards;
  - 14.6.4. ensuring notes and supporting activity have been undertaken in line with the customer interaction;
  - 14.6.5. requirement to provide feedback for any areas of development or detriment;
  - 14.6.6. recording mechanism for scores;
  - 14.6.7. scores moderation activities;
  - 14.6.8. analysis of results at individual, team and organisation level;
  - 14.6.9. supporting service quality improvements based on analysis, and
  - 14.6.10. reporting to the Grantor as part of quarterly reporting.
- 14.7. The Recipient shall permit any person authorised by the Grantor to undertake on-site or remote monitoring activities of delivery and performance of the Project activities.
- 14.8. Debt Technical Supervision staff will keep their own technical knowledge up to date by completing a minimum of 16 points of technical CPD points throughout Grant Period.

14.9. Technical Supervision activities must be delivered by staff;

14.9.1. that have two years' full time (2,200 hours) or equivalent part-time experience of delivering debt advice or have been through a recognised development programme, and

14.9.2. who are fully-competent to undertake technical supervision activities and the Recipient will evidence their technical supervisors' competency via their internal Quality and Performance Management Policy.