Unit 208 Deal with incoming telephone calls from customers

UAN:	**H/506/2154**
Level:	2
Credit value:	3
GLH:	16
Relationship to NOS:	This unit is linked to the Customers Service (2013) National Occupational Standards: • CFACSA11 Deal with incoming telephone calls from customers
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Skills CFA Assessment Strategy Competence units (S/NVQ)
Aim:	This unit aims to develop the knowledge and skills required to deal with incoming telephone calls from customers. Upon completion of this unit, learners will be able to establish the purpose of incoming customer calls and deal with customer questions and requests.

Learning outcome
The learner will: 1. understand how to deal with incoming customer calls
Assessment criteria
The learner can: 1.1 explain why an organisation should have guidance on dealing with telephone calls 1.2 explain why an organisation should have an identity checking process 1.3 explain the importance of keeping customer information up to date 1.4 explain the importance of keeping customers informed of the progress of their call 1.5 describe how **body language and facial expressions** can be detected over the telephone 1.6 describe different **questioning techniques** used when dealing with incoming calls 1.7 explain how to handle **abusive** calls.

Assessment guidance
Body language and facial expressions used when dealing with customers can show: • confidence or lack of it • anger or aggression • nervousness • abruptness • boredom • interest or disinterest • empathy • compassion **Questioning techniques** • open • probing • closed **Abusive** eg customer shouting or swearing, making lewd comments, being aggressive. **Evidence may be supplied by:** • professional discussion • reflective account • questioning • organisational policies and procedures* • service offer • legislative and regulatory requirements

Learning outcome
The learner will: 2. be able to establish the purpose of incoming customer calls
Assessment criteria
The learner can: 2.1 verify the identity of callers in line with organisational guidelines 2.2 speak clearly, concisely and politely using speech and tone to create a rapport 2.3 adapt their own communication style to meet customers' needs 2.4 listen actively to what customers are saying to collect as much information as possible 2.5 use **questioning techniques** that are appropriate to the conversation 2.6 record information in line with organisational guidelines.

Assessment guidance
Questioning techniques: • open • probing • closed

Evidence may be supplied by:

- observation
- witness testimony
- questioning
- customer data/records*
- organisational policies and procedures*.

Learning outcome
The learner will: 3. be able to deal with customer questions and requests
Assessment criteria
The learner can: 3.1 respond in a way that best meets customer and organisational requirements 3.2 give clear and concise information that meets customers' needs 3.3 manage the length of the conversation 3.4 confirm that the customer is satisfied with the outcomes of the conversation 3.5 complete agreed **post-call follow up actions**.

Assessment guidance
Post call follow up actions: eg • complete administration • update records • pass information on to others **Evidence may be supplied by:** • observation • witness testimony • questioning • customer records* • organisational documentation* • organisational policies and procedures*. Note: This unit is about dealing with incoming telephone calls and **not** outgoing which is covered in unit 209 Here the candidate will require to be observed dealing with incoming calls. Witness testimonies can be used to ensure the evidence is over time. * While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.