Unit 209 Make telephone calls to customers

UAN:	**K/506/2155**
Level:	2
Credit value:	3
GLH:	16
Relationship to NOS:	This unit is linked to the Customers Service (2013) National Occupational Standards: • CFACSA12 Make telephone calls to 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 make telephone calls to customers. Upon completion of this unit, learners will be able to plan, and make, telephone calls to customers.

Learning outcome
The learner will: 1. understand how to make telephone calls to customers
Assessment criteria
The learner can: 1.1 Explain the **legislation and regulations** relating to the use of customer information when planning to make calls 1.2 explain the importance of keeping customer information up to date 1.3 explain the **reasons** for organisational guidance on dealing with telephone calls 1.4 explain the **reasons** for organisational identity checking processes 1.5 explain how **body language and facial expressions** can be detected over the telephone 1.6 describe different **questioning techniques** when dealing with customers 1.7 explain organisational guidelines for what can and cannot be said or promised 1.8 explain how to handle abusive calls from customers.

Assessment guidance
Legislation and regulation to include: • Data Protection Act • Communications Act • Telephone Preference Service. **Reasons** eg: • legislative • regulatory • consistency • service offer **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 **Evidence may be supplied by:** • professional discussion • reflective account • questioning • organisational policies and procedures* • legislative and regulatory requirements

Learning outcome
The learner will: 2. be able to plan telephone calls to customers
Assessment criteria
The learner can: 2.1 identify the objective(s) of calls 2.2 prepare the **information** needed to make calls 2.3 plan the **structure** of calls 2.4 identify customers' **likely responses** and how they can be dealt with

Assessment guidance
Information: • call list • customer records • data needed for call eg promotion details, information on products/services being sold, follow up call **Structure:** • introduction • reason for call • call content • close call by summarising, checking details and completing administration **Likely responses:** eg objection handling • listen • empathise • check understanding of objection • offer solutions • remain patient • close and confirm **Evidence may be supplied by:** • observation • witness testimony • questioning • organisational policies and procedures* • call list • customer records*

Learning outcome
The learner will: 3. be able to make telephone calls to customers
Assessment criteria
The learner can: 3.1 use telecommunications equipment in accordance with organisational standards 3.2 confirm the identity of customers in line with organisational guidelines 3.3 make the customer aware of the purpose of the call as early as possible 3.4 speak clearly, concisely and politely, using speech and tone to create rapport 3.5 adapt their own communication style to meet customers' needs 3.6 listen actively to what customers are saying to collect as much information as possible 3.7 give clear and concise information that meets customers' needs 3.8 record information in line with organisational guidelines

3.9	complete agreed **follow up actions** after closing the telephone call.

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
- organisational policies and procedures*
- equipment manuals*
- legislative and regulatory requirements*
- customer records*
- organisational documentation*

Note:

This unit is about dealing with outgoing telephone calls and **not** incoming which is covered in unit 208

Here the candidate will require to be observed dealing with outgoing 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.