

Unit Title: **Make and receive telephone calls**

OCR unit number	107
Sector unit number	K/601/2446
Level:	1
Credit value:	3
Guided learning hours:	10

Unit purpose and aim

This unit is about making and receiving telephone calls, and transferring calls when necessary, in a business environment.

Learning Outcomes	Assessment Criteria	Exemplification
The Learner will: 1. Understand how to make telephone calls	The Learner can: 1.1 Describe the different features of telephone systems and how to use them 1.2 Give reasons for identifying the purpose of a call before making it 1.3 Describe different ways of obtaining the names and numbers of people that need to be contacted 1.4 Describe how to use a telephone system to make contact with people inside and outside an organisation 1.5 Explain the purpose of giving a positive image of self and own organisation 1.6 Explain the purpose of summarising the outcomes of a telephone conversation before ending the call 1.7 Describe how to identify problems and who to refer them to 1.8 Describe organisation	Learning outcomes 1 and 2 must be assessed using methods appropriate to the assessment of knowledge and understanding. A holistic approach to assessment should be adopted so that one piece of evidence covers more than one learning outcome and several assessment criteria.

	<p>structures and communication channels within an organisation</p> <p>1.9 Describe how to follow organisational procedures when making a telephone call</p> <p>1.10 Explain how to report telephone system faults</p>	
2. Understand how to receive and transfer telephone calls	<p>2.1 Describe how to identify callers and their needs</p> <p>2.2 Explain the purpose of giving accurate and up to date information to callers</p> <p>2.3 Explain the purpose of confidentiality and security when dealing with callers</p> <p>2.4 Describe the types of information that could affect confidentiality and security and how to handle these</p> <p>2.5 Describe ways of identifying the appropriate person to whom a call is transferred</p> <p>2.6 Describe the information to be given when transferring calls or leaving messages</p> <p>2.7 Describe how to identify problems and who to refer them to</p> <p>2.8 Describe how to follow organisational procedures when receiving a telephone call</p> <p>2.9 Explain how to report telephone system faults</p>	
3. Be able to make telephone calls	<p>3.1 Identify the purpose of the call</p> <p>3.2 Obtain the name and number of the person to be contacted</p> <p>3.3 Make contact with the person</p> <p>3.4 Communicate information to achieve the purpose of the call</p>	<p>Assessment should be planned to maximise the opportunities for the candidate to demonstrate their ability to make and receive telephone calls.</p>

	<p>3.5 Project a positive image of self and organisation</p> <p>3.6 Summarise the outcomes of the conversation before ending a call</p> <p>3.7 Report telephone system faults, if necessary</p>	
4. Be able to receive telephone calls	<p>4.1 Answer a phone following organisational procedures</p> <p>4.2 Give a positive image of self and organisation</p> <p>4.3 Identify the caller, where they are calling from, and what they need</p> <p>4.4 Give accurate and up to date information whilst protecting confidentiality and security</p> <p>4.5 Transfer calls, if required</p> <p>4.6 Take and pass on messages according to the caller's needs</p> <p>4.7 Summarise the outcomes of the conversation before ending the call</p> <p>4.8 Report telephone system faults, if necessary</p>	

Assessment

This unit is centre assessed and externally verified. A holistic approach to assessment should be adopted so that one piece of evidence covers more than one learning outcome and several assessment criteria and where appropriate, provides evidence across several units. Your assessor will use a range of assessment methods which may include:

- observation of performance in the work environment
- examination of work products
- questioning the learner
- discussing with the learner
- use of others (witness testimony)
- looking at learner statements
- recognising prior learning

Evidence requirements

A range of evidence should be gathered to cover the Learning Outcomes and Assessment Criteria. Examples may include:

- Annotated organisational procedures relating to answering, transferring and making telephone calls
- Telephone logs – incoming and outgoing calls received and made
- Notes – contact name, number, information to be relayed
- Fault reporting log
- Notes made during calls received
- Messages to colleagues

Guidance on assessment and evidence requirements

Refer to sections on Assessment and Evidence requirements above.

National Occupational Standards (NOS) mapping/signposting

This unit is based on the NOS BAA621 Make and receive telephone calls.

Functional skills signposting

This section indicates where candidates may have an opportunity to develop their functional skills.

Link to functional skills standards <http://www.qcda.gov.uk/15565.aspx>

Functional Skills Standards					
English		Mathematics		ICT	
Speaking and Listening	✓	Representing		Use ICT systems	
Reading	✓	Analysing		Find and select information	
Writing		Interpreting		Develop, present and communicate information	

Resources

Access to a working environment with associated equipment and resources

Additional information

For further information regarding administration for this qualification, please refer to the OCR document '*Admin Guide: Vocational Qualifications*' (A850) on the OCR website www.ocr.org.uk .