Unit Title:	**Make telephone calls to customers**
OCR unit number:	10
Level:	2
Credit value:	3
Guided learning hours:	16
Unit reference number:	K/506/2155

Unit aim and purpose

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 Outcomes	Assessment Criteria	Additional Guidance
The Learner will: 1 Understand how to make telephone calls to customers	**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	**Legislation and regulations** should include any industry specific legislation. Learners should also understand the implications of The Data Protection Act (1998) **Questioning techniques** may include: • Open • Closed • Verbal • Written • Probing • Clarification
2 Be able to plan telephone calls to customers	2.1 Identify the objective(s) of calls 2.2 Prepare the information needed to make calls	

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Learning Outcomes	Assessment Criteria	Additional Guidance
	2.3 Plan the structure of calls 2.4 Identify customers' likely responses and how they can be dealt with	
3 Be able to make telephone calls to customers	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	**Follow up actions** will be in accordance with organisational procedures and might include passing a customer query on to another department, confirming the answer to a query in writing or anything else that has been agreed with the customer during the call

Assessment

This unit is internally assessed by centre staff and externally verified by OCR Assessors.

Guidance on assessment

Skills CFA Assessment Strategy Competence units (S/NVQ)

National Occupational Standards (NOS) mapping/signposting

The mapping in the table below provides an indication of where evidence might be available for assessment against some of the knowledge and understanding contained in the national occupational standards (NOS). It does not claim to guarantee that evidence will meet the NOS.

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NOS can be viewed on the relevant Sector Skills Council's website or the Occupational standards directory at www.ukstandards.co.uk.

Occupational standards	Unit number	Title
Customer Service (2013) National Occupational Standards:	CFACSA12	• Make telephone calls to customers

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 .