OCR
Oxford Cambridge and RSA

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| **Unit Title:** | **Deal with incoming telephone calls from customers** |
| OCR unit number: | 9 |
| Level: | 2 |
| Credit value: | 3 |
| Guided learning hours: | 16 |
| Unit reference number: | H/506/2154 |

## Unit aim and purpose

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 Outcomes | Assessment Criteria | Additional Guidance |
|---|---|---|
| **The Learner will:**<br>1 Understand how to deal with incoming customer calls | **The Learner can:**<br>1.1 Explain why an organisation should have guidance on dealing with telephone calls<br>1.2 Explain why an organisation should have an **identity checking process**<br>1.3 Explain the importance of keeping customer information up to date<br>1.4 Explain the importance of keeping customers informed of the progress of their call<br>1.5 Describe how body language and facial expressions can be detected over the telephone<br>1.6 Describe different **questioning techniques** used when dealing with incoming calls<br>1.7 Explain how to handle abusive calls | **Identity checking processes** may include:<br>• Third party verification (TPV)<br>• Passwords<br>• Passport/bank account numbers<br><br>**Questioning techniques** may include:<br>• Open<br>• Closed<br>• Probing<br>• Clarifying and confirming |
| 2 Be able to establish the purpose of incoming customer calls | 2.1 Verify the identity of callers in line with organisational guidelines | |

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| Learning Outcomes | Assessment Criteria | Additional Guidance |
|---|---|---|
| | 2.2 Speak clearly, concisely and politely using speech and tone to create a rapport<br>2.3 Adapt their own communication style to meet customers' needs<br>2.4 **Listen actively** to what customers are saying to collect as much information as possible<br>2.5 Use questioning techniques that are appropriate to the conversation<br>2.6 Record information in line with organisational guidelines | **Listening actively** may include:<br>• Asking questions to check information<br>• Repeating information to show understanding<br>• Avoiding distractions, assumptions and interruptions<br>• Using body language/facial expressions as if the customer is present |
| 3 Be able to deal with customer questions and requests | 3.1 Respond in a way that best meets customer and organisational requirements<br>3.2 Give **clear and concise information** that meets customers' needs<br>3.3 Manage the length of the conversation<br>3.4 Confirm that the customer is satisfied with the outcomes of the conversation<br>3.5 Complete agreed **post-call follow up actions** | **Clear and concise information** will be delivered in language which the customer understands<br><br>**Post 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)


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## 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.

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: | CFACSA11 | • Deal with incoming telephone calls from 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 .