

Unit Title:	Deal with incoming telephone calls from customers
Unit number	A11
Level:	2
Credit value:	5
Guided learning hours:	33

Unit purpose and aim

Many organisations rely on dealing with incoming telephone calls as a key part of their customer service procedures. Customer expectations are high when calling organisations because they have had an opportunity to prepare for their call. In addition, a proportion of calls start with customers in a negative frame of mind because the caller sees making a call as a way of dealing with a customer service problem. This unit is about being prepared to deal effectively with calls and using effective communication to satisfy customers with the outcome of each call.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<p>The Learner will:</p> <p>1 Use communication systems effectively</p>	<p>The Learner can:</p> <p>1.1 Operate telecommunication equipment efficiently and effectively</p> <p>1.2 Speak clearly and slowly and adapt their speech to meet the individual needs of their customer</p> <p>1.3 Listen carefully when collecting information from their customer</p> <p>1.4 Select the information they need to record and store following their organisation's guidelines</p> <p>1.5 Update their customer records during or after the call to reflect the key points of the conversation</p>	<p>Candidates must be able to:</p> <ul style="list-style-type: none"> Operate telecommunication equipment Speak in a way that meets the individual needs of the customers Use listening techniques to obtain and record information Store information according to organisational guidelines Update customer records to reflect the conversation with the customer
<p>2 Establish rapport with customers who are calling</p>	<p>2.1 Greet their customer following their organisation's guidelines</p>	<p>Candidates must be able to:</p> <ul style="list-style-type: none"> Follow organisational guidelines when greeting customers Use a range of effective listening techniques

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	2.2 Listen closely to their customer to identify their precise reason for calling and what outcome they are seeking from the call 2.3 Confirm the identity of their customer following organisational guidelines 2.4 Use effective and assertive questions to clarify their customer's requests	<ul style="list-style-type: none"> • Use security procedures to identify customers according to organisational guidelines • Use effective questioning techniques
3 Deal effectively with customer questions and requests	3.1 Identify all the options they have for responding to their customer and weigh up the benefits and drawbacks of each 3.2 Choose the option that is most likely to lead to customer satisfaction within the service offer 3.3 Give clear and concise information to customers in response to questions or requests 3.4 Use questions and answers to control the length of the conversation 3.5 Keep their customer regularly informed about their actions when accessing information to provide responses or if they are going to be on hold for a period of time 3.6 Put their customer on hold and ensure they cannot be heard if they are discussing action with others or calling a colleague 3.7 Summarise the outcome of the call and any actions that they or their customer will take as a result 3.8 Check before the call is finished that their customer is content that all their questions or requests have been dealt with	<p>Candidates must have an understanding of:</p> <ul style="list-style-type: none"> • The limits of their responsibility to meet customer needs within the service offer and who to refer to • Effective questioning techniques • The importance of keeping customers informed <p>Candidates must be able to:</p> <ul style="list-style-type: none"> • Communicate effectively and clearly to meet customer needs • Use a range of relevant questioning techniques • Close calls appropriately • Use equipment effectively • Keep customers informed of what they are doing • Summarise the key points of the call and their subsequent actions • Complete any follow up actions during and after the call • Pass on messages to colleagues in an effective and timely way • Keep promises made to customers

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	3.9 Complete any follow up actions agreed during the call 3.10 Take a clear message for a colleague if they are unable to deal with some aspect of their customer's questions or requests 3.11 Ensure that promises to call back are kept	
4 Know how to deal with incoming telephone calls from customers	4.1 Describe their organisation's guidelines and procedures for the use of telecommunication equipment 4.2 Explain how to operate the organisation's telecommunication equipment 4.3 Explain the importance of speaking clearly and slowly when dealing with customers by telephone 4.4 Describe the effects of smiling and other facial expressions that can be detected by somebody listening to them on the telephone 4.5 Explain the importance of adapting their speech to meet the needs of customers who may find their language or accent difficult to understand 4.6 Identify what information is important to note during or after telephone conversations with customers 4.7 Describe their organisation's guidelines and procedures for what should be said during telephone conversations with customers 4.8 Explain the importance of keeping their customer informed if they are on hold during a call 4.9 Explain the importance of not talking across an open line	Candidates must have an understanding of: <ul style="list-style-type: none"> • Organisational procedures/guidelines for using telecommunication equipment • How to use the equipment • The importance of speaking clearly and slowly • The importance of adapting their communication style to meet individual needs • What information is required • The importance of keeping customers informed • How to take a message for colleagues and the information required • The process for follow up calls • How to handle abusive calls

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	4.10 List details that should be included if taking a message for a colleague 4.11 Describe their organisation's guidelines and procedures for taking action to follow up calls made to customers 4.12 Describe their organisation's guidelines for handling abusive calls	

Assessment

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

Evidence requirements

1. Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. (*Guidelines for a Realistic Working Environment can be found in the OCR Customer Service Centre Handbook which can be downloaded from the OCR website: www.ocr.org.uk*).
2. You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
3. You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
4. You may provide evidence of dealing with customers using land line telephones, mobile telephone, internet telephone connections, video telephone systems or any other technology that involves a conversation with a customer at a distance.
5. Your evidence must include examples of dealing with customers who:
 - a have standard expectations of your organisation's customer service
 - b have experienced difficulties when dealing with your organisation
 - c have made a specific request for information
 - d need to be informed of circumstances of which they are unaware.
6. Your evidence must include examples of dealings with customers that are:
 - a planned
 - b unplanned.
7. You must provide evidence of dealing with customers by telephone:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job
 - d when people, systems or resources have let you down.

8. You must provide evidence that you have taken messages that are passed on to colleagues:
- a verbally
 - b in a form that maintains a permanent record.

Guidance on assessment and evidence requirements

Please refer to the OCR Customer Service Centre Handbook available from the OCR website www.ocr.org.uk

National Occupational Standards (NOS) mapping/signposting

This unit maps fully to competences outlined in the Customer Service 2010 (Institute of Customer Service) suite of National Occupational Standards.

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