

<b>Unit Title:</b>	<b>Make telephone calls to customers</b>
Unit number	A12
Level:	2
Credit value:	6
Guided learning hours:	40

## Unit purpose and aim

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Many customer service jobs involve contacting customers by telephone. Making an effective telephone call involves some very specific actions and should not be seen as a casual activity. By making a call to a customer the learner will have the opportunity to prepare and is therefore more likely to be able to lead the conversation in the direction they want it to go. This unit is about planning and making calls to customers in a way that contributes positively to the organisation's customer service.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<b>The Learner will:</b> 1 Plan their calls effectively	<b>The Learner can:</b> <ul style="list-style-type: none"> <li>1.1 Use all appropriate customer information to plan their call</li> <li>1.2 Anticipate their customer's expectations and assemble all the information they might need before their conversation with the customer</li> <li>1.3 Identify the objective of their call and the way in which they expect the call to end</li> <li>1.4 Plan the opening part of their conversation with their customer and anticipate possible responses</li> </ul>	Candidates must have an understanding of: <ul style="list-style-type: none"> <li>• The information they require prior to making calls to customers</li> <li>• The purpose of the calls</li> <li>• How to plan the calls</li> </ul>
2 Use communication systems effectively	2.1 Operate telecommunication equipment efficiently and effectively	Candidates must have an understanding of: <ul style="list-style-type: none"> <li>• The equipment and how it used</li> <li>• How to communicate effectively via the telephone</li> </ul>

<b>Learning Outcomes</b>	<b>Assessment Criteria</b>	<b>Knowledge, understanding and skills</b>
	<p>2.2 Speak clearly and slowly and adapt their speech to meet the individual needs of their customer</p> <p>2.3 Listen carefully when collecting information from their customer</p> <p>2.4 Select the information they need to record and store following their organisation's guidelines</p> <p>2.5 Update their customer records during or after the call to reflect the key points of the conversation</p>	<ul style="list-style-type: none"> <li>• What information they need to record and how to record it</li> </ul>
3 Make focussed calls to their customer	<p>3.1 Open the conversation positively and establish a rapport with their customer</p> <p>3.2 Confirm the identity of their customer following organisational guidelines</p> <p>3.3 Ensure that their customer is aware of the purpose of their call as early as possible</p> <p>3.4 Respond positively to queries and objections from their customer</p> <p>3.5 Summarise the outcome of the call and any actions that they or their customer will take as a result</p> <p>3.6 Complete any follow up actions agreed during the call</p>	<p>Candidates must have an understanding of:</p> <ul style="list-style-type: none"> <li>• How to build a rapport with the customer</li> <li>• The procedures for confirming identity of the customer</li> <li>• How to clarify the purpose of the call</li> <li>• How to respond to their customer</li> <li>• How to summarise the call and the actions required</li> <li>• The purpose for conducting follow up actions</li> </ul>
4 Know how to make telephone calls to customers	<p>4.1 Describe the relevant parts of legislation, external regulations and their organisation's procedures relating to the use of customer information to plan calls</p> <p>4.2 Describe their organisation's guidelines and procedures for the use of telecommunication technology</p> <p>4.3 Explain how to operate their organisation's telecommunication technology</p>	<p>Candidates must have an understanding of:</p> <ul style="list-style-type: none"> <li>• Organisational procedures and external legislation/regulations relating to telephone calls with customers</li> <li>• The procedures for using the telephone equipment</li> <li>• The importance of speaking clearly and slowly</li> <li>• Behaviours that can be detected by the customer</li> <li>• How to adapt speech for customers with differing needs</li> </ul>

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
	<p>4.4 Explain the importance of speaking clearly and slowly when dealing with customers by telephone</p> <p>4.5 Describe the effects of smiling and other facial expressions that can be detected by somebody listening to them on the telephone</p> <p>4.6 Explain the importance of adapting their speech to meet the needs of customers who may find their language or accent difficult to understand</p> <p>4.7 Identify what information it is important to note during or after telephone conversations with customers</p> <p>4.8 Describe their organisation's guidelines and procedures for what should be said during telephone conversations with customers</p> <p>4.9 Describe their organisation's guidelines and procedures for taking action to follow up calls made to customers</p>	<ul style="list-style-type: none"> <li>• What information they should record relating to the calls</li> <li>• Organisational procedures and guidelines relating to what information, responses they can provide and actions to be taken when following up calls</li> </ul>

## Assessment

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

## Evidence requirements

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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](http://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 are receptive to the content of your call
  - b are not receptive to the content of your call.
6. 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.

## Guidance on assessment and evidence requirements

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Please refer to the OCR Customer Service Centre Handbook available from the OCR website  
[www.ocr.org.uk](http://www.ocr.org.uk)

## National Occupational Standards (NOS) mapping/signposting

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

## Additional information

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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](http://www.ocr.org.uk)