

Unit CU804 Make Telephone Calls to Customers

Aims

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.

Level: 2

Credit value: 6

Learning outcomes The learner will:	Assessment criteria The learner can:
1. Plan their calls effectively	1.1 Use all appropriate customer information to plan their call 1.2 Anticipate their customer's expectations and assemble all the information they might need before their conversation with the customer 1.3 Identify the objective of their call and the way in which they expect the call to end 1.4 Plan the opening part of their conversation with their customer and anticipate possible responses
2. Use communication systems effectively	2.1 Operate telecommunication equipment efficiently and effectively 2.2 Speak clearly and slowly and adapt their speech to meet the individual needs of their customer 2.3 Listen carefully when collecting information from their customer 2.4 Select the information they need to record and store following their organisation's guidelines 2.5 Update their customer records during or after the call to reflect the key points of the conversation

<p>3. Make focussed calls to their customer</p>	<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>4. Know how to make telephone calls to customers</p>	<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>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>

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 Assessment Strategy for Customer Service S/NVQs at Levels 1,2,3 and 4 – February 2010*)
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