UBU10

Make telephone calls to customers

The aim of this unit is to develop the skills to be able to make calls to customers. You will learn how gather the information needed and plan the structure of the call. You will also learn how your body language can be detected on a call and speaking clearly will help meet the customer's needs.

Level

2

Credit value

3

GLH

16

Observation(s)

2

External paper(s)

0



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Learning outcomes

On completion of this unit you will:

1. Be able to make telephone calls to customers
2. Be able to plan telephone calls to customers
3. Understand how to make telephone calls to customers

Evidence requirements

1. *Environment*
   Evidence for this unit may be gathered within the workplace or realistic working environment (RWE).
2. *Simulation*
   Simulation is not allowed in this unit.
3. *Observation outcomes*
   Competent performance of Observation outcomes must be demonstrated on **at least two occasions**. Assessor observations, witness testimonies and products of work are likely to be the most appropriate sources of performance evidence. Professional discussion may be used as supplementary evidence for those criteria that do not naturally occur.

   Assessed observations should not be carried out on the same day for the same learning outcome. There should be sufficient time between assessments for reflection and personal development.

   You need to meet the same standard on a regular and consistent basis. Separating the assessments by a period of at least two weeks is recommended as competence must be demonstrated on a consistent and regular basis.
4. *Knowledge outcomes*
   There must be evidence that you possess all the knowledge and understanding listed in the Knowledge section of this unit. In most cases this can be done by professional discussion and/or oral questioning. Other methods, such as projects, assignments and/or reflective accounts may also be used.
5. *Tutor/Assessor guidance*
   You will be guided by your tutor/assessor on how to achieve learning outcomes in this unit. All outcomes must be achieved.

   For guidance on the assessment material for some individual units please refer to the '**Qualification Specification**'. This can be found on www.vtctskills.org.uk.
6. *External paper*
   There is no external paper requirement for this unit.

Achieving observations

Achieving observation outcomes

Your assessor will observe your performance of practical tasks. The minimum number of competent observations required is indicated in the Evidence requirements section of this unit.

Criteria may not always naturally occur during a practical observation. In such instances you will be asked questions to demonstrate your competence in this area. Your assessor will document the criteria that have been achieved through professional discussion and/or oral questioning. This evidence will be recorded by your assessor in written form or by other appropriate means.

Your assessor will sign off a learning outcome when all criteria have been competently achieved.

Relationship to National Occupational Standards

Customer Service (2013) National Occupational Standards:

- CFACSA12 Make telephone calls to customers



Observations

Learning outcome 1

Be able to make telephone calls to customers

You can:

a. Use telecommunications equipment in accordance with organisational standards

b. Confirm the identity of customers in line with organisational guidelines

c. Make the customer aware of the purpose of the call as early as possible

d. Speak clearly, concisely and politely, using speech and tone to create rapport

e. Adapt your communication style to meet customers' needs

f. Listen actively to what customers are saying to collect as much information as possible

g. Give clear and concise information that meets customers' needs

h. Record information in line with organisational guidelines

i. Complete agreed follow up actions after closing the telephone call

**May be assessed by supplementary evidence.*

Observation	1	2	*Optional*
Date achieved			
Criteria questioned orally			
Portfolio reference			
Assessor initials			
Learner signature			

Developing knowledge

Achieving knowledge outcomes

You will be guided by your tutor and assessor on the evidence that needs to be produced. Your knowledge and understanding will be assessed using the assessment methods listed below*:

- Projects
- Observed work
- Witness statements
- Audio-visual media
- Evidence of prior learning or attainment
- Written questions
- Oral questions
- Assignments
- Case studies
- Professional discussion

Where applicable your assessor will integrate knowledge outcomes into practical observations through professional discussion and/or oral questioning.

When a criterion has been orally questioned and achieved, your assessor will record this evidence in written form or by other appropriate means. There is no need for you to produce additional evidence as this criterion has already been achieved.

Some knowledge and understanding outcomes may require you to show that you know and understand how to do something. If you have practical evidence from your own work that meets knowledge criteria, then there is no requirement for you to be questioned again on the same topic.

**This is not an exhaustive list.*

Knowledge



Learning outcome 2

Be able to plan telephone calls to customers

You can:	Portfolio reference
a. Identify the objective(s) of calls	
b. Prepare the information needed to make calls	
c. Plan the structure of calls	
d. Identify customers' likely responses and how they can be dealt with	



Learning outcome 3

Understand how to make telephone calls to customers

You can:	Portfolio reference
a. Explain the legislation and regulations relating to the use of customer information when planning to make calls	
b. Explain the importance of keeping customer information up-to-date	
c. Explain the reasons for organisational guidance on dealing with telephone calls	
d. Explain the reasons for organisational identity checking processes	
e. Explain how body language and facial expressions can be detected over the telephone	
f. Describe different questioning techniques when dealing with customers	
g. Explain organisational guidelines for what can and cannot be said or promised	
h. Explain how to handle abusive calls from customers	