UBU9

Deal with incoming telephone calls from customers

The aim of this unit is to develop your knowledge, understanding and skills to deal with incoming customer calls. You will learn how to establish the purpose of the call and be able to deal with the query in a way that meets your organisation's customer service standard.

Level

2

Credit value

3

GLH

16

Observation(s)

2

External paper(s)

0



Deal with incoming telephone calls from customers

Learning outcomes

On completion of this unit you will:

1. Be able to establish the purpose of incoming customer calls
2. Be able to deal with customer questions and requests
3. Understand how to deal with incoming customer calls

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:

- CFACSA11 Deal with incoming telephone calls from customers



Observations

Learning outcome 1

Be able to establish the purpose of incoming customer calls

You can:

a. Verify the identity of callers in line with organisational guidelines

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

c. Adapt your own communication style to meet customers' needs

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

e. Use questioning techniques that are appropriate to the conversation

f. Record information in line with organisational guidelines

**May be assessed by supplementary evidence.*

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



Learning outcome 2

Be able to deal with customer questions and requests

You can:

a. Respond in a way that best meets customer and organisational requirements

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

c. Manage the length of the conversation

d. Confirm that the customer is satisfied with the outcomes of the conversation

e. Complete agreed post-call follow up actions

**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 3

Understand how to deal with incoming customer calls

You can:	Portfolio reference
a. Explain why an organisation should have guidance on dealing with telephone calls	
b. Explain why an organisation should have an identity checking process	
c. Explain the importance of keeping customer information up-to-date	
d. Explain the importance of keeping customers informed of the progress of their call	
e. Describe how body language and facial expressions can be detected over the telephone	
f. Describe different questioning techniques used when dealing with incoming calls	
g. Explain how to handle abusive calls	