

219 Use a telephone system

Summary

Use a telephone system to make, receive and transfer internal and external calls; and to check and deal with recorded messages.

You will apply the following skills:

- Questioning
- Listening
- Researching
- Communicating
- Presenting yourself
- Summarising
- Using technology
- Problem solving

Performance Indicators

You will:

Making calls

1. Identify the purpose of the call
2. Obtain the name and numbers of the person to be contacted
3. Make contact with the person
4. Communicate information to achieve the purpose of the call
5. Project a positive image of yourself and your organisation
6. Summarise the outcomes of the conversation before ending the call

Receiving calls

7. Answer the phone according to your organisation's procedures
8. Project a positive image of yourself and your organisation
9. Identify the caller, where they are calling from and what they need
10. Provide accurate and up-to-date information whilst protecting confidentiality and security
11. Transfer calls where requested
12. Take and relay messages according to the caller's needs
13. Summarise the outcomes of the conversation before ending the call

Dealing with message systems

14. Keep your message system up-to-date
15. Check the system for callers' messages
16. Respond to callers' messages within agreed timescales
17. Delete messages when you have dealt with them
18. Leave recorded messages on other people's systems that achieve their purpose

Knowledge

You will know:

- 1.** The different features of telephone systems and how to use them
- 2.** Why it is important to identify the purpose of a call before you make it
- 3.** The different methods you can use to obtain the names and numbers of people that you have to make contact with
- 4.** How to use telephone systems to make contact with people inside and outside your organisation
- 5.** Why it is important to project a positive image of yourself and your organisation
- 6.** Why it is important to summarise the outcomes of a telephone conversation before ending the call
- 7.** How to follow your organisation's procedures when making and receiving calls
- 8.** How to identify the caller and their needs
- 9.** Why it is important to give accurate and up-to-date information to callers
- 10.** Why confidentiality and security are important when dealing with callers
- 11.** The types of information that could affect confidentiality and security and how to handle these
- 12.** How to identify the appropriate person to whom you should transfer a call
- 13.** The information you should give when transferring calls, taking or leaving messages
- 14.** The different types of message systems and their main features
- 15.** Why it is important to keep your message system up-to-date