

Unit: CS9 Deal with customers by telephone (ICS Unit 17)

Overview

This unit is about the skills and competences you need when dealing with your customer by telephone. Customer satisfaction in this situation depends on good feelings about the way the transaction has been handled as well as the features and benefits of the services or products that are offered to the customer. In financial services it is particularly important for customers to feel confident that the information they receive by telephone is accurate and complete. Whilst verbal communication is important, your focus on your customer and the rapport that is formed also depends on your skills with the telephone system and any information you are accessing whilst on the telephone to your customer.

Outcomes of effective performance

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| CS9/O1 | You operate the telephone equipment efficiently and effectively | CS9/O11 | Ensure that your customer is aware of the purpose of your call as early as possible |
| CS9/O2 | You keep your customer regularly informed about your actions when accessing information to provide responses or if they are going to be on hold for a period of time | CS9/O12 | You respond positively to queries and objections from your customer |
| CS9/O3 | You speak clearly and slowly to allow for the possibility that reception on the telephone line may not be perfect | CS9/O13 | You summarise the outcome of the call and any actions that you or your customer will take as a result |
| CS9/O4 | You adapt your speech to meet the individual needs of your customer | CS9/O14 | You listen carefully when collecting information from your customer so that you do not make mistakes or have to keep repeating the question |
| CS9/O5 | You control the length of the conversation if the call is costing your customer money | CS9/O15 | You greet your customer following your organisation's guidelines |
| CS9/O6 | You ensure that promises to call back are kept | CS9/O16 | You listen closely to your customer to identify their precise reason for calling and what they are seeking as the outcome of the call |
| CS9/O7 | You anticipate your customer's expectations and assemble all the information you might need before your conversation with your customer | CS9/O17 | You identify all the options you have for responding to your customer, weigh up the benefits and drawbacks of each |
| CS9/O8 | You plan the opening part of your conversation with your customer and anticipate their possible responses | CS9/O18 | You choose the option that is most likely to lead to customer satisfaction within the service offer |
| CS9/O9 | You plan the objective of your call and the way in which you expect the call to end | CS9/O19 | You summarise the outcome of the call and any actions that you or your customer will take as a result |
| CS9/O10 | You open the conversation positively and establish a rapport with your customer | CS9/O20 | You select the appropriate information you need to record and store following your organisation's guidelines |

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CS9/O21 Take a clear message for a colleague if you are unable to deal with some aspect of your customer's expectations

CS9/O22 You put your customer on hold and ensure you cannot be heard if you are discussing action with others or calling a colleague

Behaviours which underpin effective performance

CS9/B1 You give a consistent and reliable performance at work

CS9/B2 You present information clearly and concisely

CS9/B3 You show respect for others in your dealings with them

CS9/B4 You make information available to those who need it and have a right to it

CS9/B5 You use communication styles that are appropriate to different people and situations

CS9/B6 You carry out tasks with due regard to your organisation's policies and procedures, including those covering health and safety at work

CS9/B7 You comply with legal requirements, industry regulations and professional codes

Knowledge and understanding

1 The importance of speaking clearly and slowly when dealing with customers by telephone

2 The effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone

3 The importance of adapting your speech to meet the needs of customers who may find your language or accent hard to understand

4 Your organisation's guidelines and procedures for the use of telephone equipment

5 Your organisation's guidelines and procedures for what should be said during telephone conversations with customers

6 What details should be included if taking a message for a colleague

7 How to operate the organisation's telephone equipment

8 The importance of keeping your customer informed if they are on hold during a call

9 The importance of not talking over an open telephone

10 Your organisation's guidelines for handling abusive calls