

S106: Make and receive telephone calls

Overview: Make, receive or transfer telephone calls in line with organisational requirements.

Links: Communications; Customer Service

Specific skills: • Communicating • Personal presentation • Questioning • Summarising

Performance Indicators

Make 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. Summarise the outcomes of the conversation before ending the call
6. Report telephone system faults to the appropriate colleague

Receive calls

7. Answer the telephone according to organisational procedures
8. Project a positive image of self and the organisation
9. Identify the caller, where they are calling from and what they need
10. Provide accurate and up-to-date information to callers while protecting confidentiality and security
11. Take and pass on messages according to caller's needs
12. Deal with problems in handling calls, referring to the appropriate person where necessary

Transfer calls

13. Transfer calls promptly, when appropriate
14. Explain clearly, when a call cannot be transferred, the reason why and agree appropriate action with the caller
15. When callers are placed on hold, check regularly to see if they wish to continue to hold, in line with organisational procedures

Knowledge & Understanding

- A. The different features of telephone systems and how to use them
- B. Organisation structures and communication channels within an organisation
- C. How to follow organisational procedures when making and receiving calls
- D. The purpose of projecting a positive image of self and the organisation
- E. The purpose and value of confidentiality and security when dealing with callers
- F. The types of information that could affect confidentiality and security and how to handle these
- G. The purpose of summarising outcomes of a telephone conversation before ending the call
- H. How to identify problems and who to refer them to
- I. How to report telephone system faults

Make calls

- J. The reasons for identifying the purpose of a call before making it
- K. The different methods that can be used to obtain the names and numbers of people that need to be contacted
- L. How to use telephone systems to make contact with people inside and outside the organisation

Receive calls

- M. How to identify the caller and their needs
- N. The purpose of giving accurate and up-to-date information to callers

Transfer calls

- O. The information to be given when transferring calls, taking or leaving messages
- P. How to identify the appropriate person to whom a call is transferred