

CFACSA11 (SQA Unit Code – H9XT 04)

Deal with incoming telephone calls from customers



Overview

This Standard is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have most impact on the way your customer sees you and your organisation. Remember that customers include everyone you provide a service to. They may be external to your organisation or they may be internal customers.

Many organisations deal with incoming telephone calls as a key part of their customer service. Customer expectations are high when calling organisations because they have had an opportunity to prepare for their call. In addition, many calls start with customers in a negative frame of mind because they see making a call as a way of dealing with a customer service problem. This Standard is about being prepared to deal effectively with calls and using effective communication to satisfy customers with the outcome of each incoming call.

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Performance criteria

Use telecommunications systems effectively

You must be able to:

- P1 operate telecommunications equipment efficiently and effectively
- P2 speak clearly and slowly and adapt your speech to meet the individual needs of your customer
- P3 listen carefully when collecting information from your customer
- P4 select the information you need to record and store following your organisation's guidelines
- P5 update customer records during or after the call to reflect the key points of the conversation

Establish rapport with customers who are calling

You must be able to:

- P6 greet your customer following your organisation's guidelines
- P7 listen closely to your customer to identify their precise reason for calling and what outcome they are seeking from the call
- P8 confirm the identity of your customer following organisational guidelines
- P9 use effective and assertive questions to clarify your customer's requests

Deal effectively with customer questions and requests

You must be able to:

- P10 identify the options you have for responding to your customer and weigh up the benefits and drawbacks of each
- P11 choose the option that is most likely to lead to customer satisfaction within the service offer
- P12 give clear and concise information to customers in response to questions or requests
- P13 use questions and answers to control the length of the conversation
- P14 keep your customer informed about your actions when accessing information to provide responses or if they are going to be on hold for a period of time
- P15 put your customer on hold and ensure you cannot be heard if you are discussing action with others or calling a colleague
- P16 summarise the outcome of the call and any actions that you or your customer will take as a result
- P17 check before the call is finished that your customer is content that all their questions or requests have been dealt with
- P18 complete any follow up actions agreed during the call
- P19 take a clear message for a colleague if you are unable to deal with some aspect of your customer's questions or requests
- P20 ensure that promises to call back are kept

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Knowledge and understanding

You need to know and understand:

- K1 your organisation's guidelines and procedures for the use of the telecommunications system
- K2 how to operate your organisation's telecommunications system
- K3 the importance of speaking clearly and slowly when dealing with customers by telephone
- K4 the effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone
- K5 the importance of adapting your speech to meet the needs of customers who may find your language or accent difficult to understand
- K6 what information it is important to note during or after telephone conversations with customers
- K7 your organisation's guidelines and procedures for what should be said during telephone conversations with customers
- K8 the importance of keeping your customer informed if they are on hold during a call
- K9 the importance of not talking across an open line
- K10 what details should be included if taking a message for a colleague
- K11 your organisation's guidelines and procedures for taking action to follow up calls made to customers
- K12 your organisation's guidelines for handling abusive calls

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SQA Evidence Requirements to Support this Unit

This Unit is designed to assess the skills and knowledge of candidates in the workplace. Candidate evidence should be generated under workplace conditions (**either paid or voluntary**) and evidence must be generated with different customers on different occasions over a sufficient period of time.

Observation should be the primary and preferred source of evidence of competent performance wherever possible. Observation of candidate performance will be supported by other methods of assessment which may include:

- ◆ witness testimony
- ◆ questioning
- ◆ candidate statement
- ◆ professional discussion
- ◆ product and photographic evidence,
- ◆ relevant active documentation, reports, presentations and
- ◆ other valid evidence which relates directly to learner performance under workplace conditions

A combination of performance and knowledge evidence is required to enable the assessor to confirm that the learner is competent.

Simulation should only be used in exceptional circumstances and it should only be for small parts of the Unit. Simulated assessments **must** be undertaken in a realistic working environment (RWE). A RWE is 'an environment which replicates the key characteristics in which the skill to be assessed is normally employed'. The RWE must provide conditions that are the same as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working. Guidelines for using RWE can be found in the Assessment Strategy for Customer Service SVQs at link: <http://www.sqa.org.uk/sqa/16732.html>

SQA's Guide to Assessment is designed to provide support for everyone who assesses for SQA qualifications. It looks at the principles of assessment, and brings together information on assessment in general as well as on best practice in assessment. The Guide to Assessment can be downloaded free from SQA's website www.sqa.org.uk

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