

## CFACSA12 (SQA Unit Code – H9XV 04)

### Make telephone calls to customers



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#### 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 customer service jobs involve contacting customers by telephone. Making an effective telephone call involves very specific actions and should not be seen as a casual activity. By making a call to a customer you have the opportunity to prepare and you are therefore more likely to be able to lead the conversation in the direction you want it to go. This Standard is about planning and making calls to customers in a way that contributes positively to your organisation's customer service.

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### Performance criteria

#### Plan your calls effectively

- You must be able to:*
- P1 use appropriate customer information to plan your call
  - P2 anticipate your customer's expectations and assemble all the information you might need before your conversation with your customer
  - P3 identify the objective of your call and the way in which you want the call to end
  - P4 plan the opening part of your conversation with your customer and anticipate their possible responses

#### Use telecommunications systems effectively

- You must be able to:*
- P5 operate telecommunication equipment efficiently and effectively
  - P6 speak clearly and slowly and adapt your speech to meet the individual needs of your customer
  - P7 listen carefully when collecting information from your customer
  - P8 select the information you need to record and store following your organisation's guidelines
  - P9 update customer records during or after the call to reflect the key points of the conversation

#### Make focussed calls to your customer

- You must be able to:*
- P10 open the conversation positively and establish a rapport with your customer
  - P11 confirm the identity of your customer following organisational guidelines
  - P12 ensure that your customer is aware of the purpose of your call as early as possible
  - P13 respond positively to queries and objections from your customer
  - P14 summarise the outcome of the call and any actions that you or your customer will take as a result
  - P15 complete any follow up actions agreed during the call

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#### Knowledge and understanding

*You need to know and understand:*

- K1 relevant parts of legislation, external regulations and your organisation's procedures relating to the use of customer information to plan calls
- K2 how to make use of information, including information through social media, about your customer when making a call
- K3 your organisation's guidelines and procedures for the use of the telecommunications system
- K4 how to operate your organisation's telecommunications system
- K5 the importance of speaking clearly and slowly when dealing with customers by telephone
- K6 the effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone
- K7 the importance of adapting your speech to meet the needs of customers who may find your language or accent difficult to understand
- K8 what information it is important to note during or after telephone conversations with customers
- K9 your organisation's guidelines and procedures for what should be said and not said during telephone conversations with customers
- K10 your organisation's guidelines and procedures for taking action to follow up calls made to customers

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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](http://www.sqa.org.uk)

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**Originating organisation** Skills CFA

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**Relevant occupations** Customer Service Occupations

## **CFACSA12 (SQA Unit Code – H9XV 04)**

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**Suite**

Customer Service (2013)

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**Key words**

customer service; communication; problem solving;  
behaviours; work with others; team working; outgoing  
telephone; outbound; conversation; planning; communication;  
focussing; summarise