

Make and receive telephone calls

Overview

This standard is about using the telephone. It is for anyone in the organisation that regularly uses the telephone such as a receptionist or telephonist. This may be the initial contact a customer has with the establishment therefore it is important that receiving, making or transferring calls is carried out professionally and efficiently. Each organisation will have their own set of standards for doing this task but this standard looks at the minimum requirements necessary.

When you have completed this standard you will be able to demonstrate your understanding of and ability to:

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Performance criteria

You must be able to:

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 required
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
7. Project a positive image of self and the organisation at all times

Receive calls

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

Transfer calls

14. Transfer calls promptly, when appropriate
15. Explain when a call cannot be transferred, the reason why and agree appropriate action with the caller
16. Check regularly to see if the caller wants to continue to hold if unable to connect to the required extension, in line with organisational procedures
17. Project a positive image of self and the organisation at all times

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Knowledge and understanding

You need to know and understand:

1. The different features of telephone systems and how to use them
2. Organisation structures and communication channels within an organisation
3. How to follow organisational procedures when making and receiving calls
4. The purpose of projecting a positive image of self and the organisation
5. The purpose and value of confidentiality and security when dealing with callers
6. The types of information that could affect confidentiality and security and how to handle these
7. The purpose of summarising outcomes of a telephone conversation before ending the call
8. How to identify problems and who to refer them to
9. How to report telephone system faults

Make calls

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

Receive calls

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

Transfer calls

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

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