

Process information for the reception function

Overview

This standard is about taking and receiving business telephone calls. It is for people that deal with customers both over the telephone and face to face. It covers finding information for other people – for example customers and colleagues – and giving them this information quickly and clearly. The standard also covers checking numbers and making basic calculations involving whole numbers and money (to two decimal places).

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

- Process information for the reception function

Performance criteria

You must be able to:

Deal with incoming and outgoing telephone calls

1. Answer the telephone promptly, using your organisation's style
2. Identify the caller and determine their requirements
3. Answer queries accurately according to your own level of responsibility
4. Make outgoing calls, for self or on behalf of others, using your organisation's style and procedures
5. Give relevant information promptly and accurately
6. Refer any queries that are beyond your level of responsibility to the appropriate member of staff

Give people the information they need

7. Find out what information is needed
8. Identify the right source for the information
9. Access the information and organise it clearly and logically
10. Give the information to the person who has asked for it within agreed time limits
11. Give only relevant information ensuring that confidentiality is maintained at all times
12. Ask for help from an appropriate member of staff when you cannot find the information required
13. Explain politely to the person asking for the information if you have had problems finding it

Do basic number work

14. Check numbers to make sure they are accurate and correct
15. Carry out and check basic calculations
16. Present the results of your checks and calculations neatly and clearly
17. Report any errors or things that do not match to the appropriate member of staff promptly

Knowledge and understanding

You need to know and understand:

For the whole unit

1. Your organisation's style for answering and making telephone calls and why it is important to use this
2. How to establish a rapport and goodwill with people on the telephone
3. The different types of telephone equipment in your workplace and how to use it
4. Why it is important to communicate effectively and efficiently
5. How to listen, interpret, extract and record information

Deal with incoming and outgoing telephone calls

6. How quickly you should answer the telephone
7. Why it is important to establish a rapport and goodwill with callers
8. How to compose messages accurately and effectively

Give people the information they need

9. Why it is important to interpret information and instructions correctly
10. Sources of information you can use to help deal with queries
11. Your organisation's policies and procedures for confidentiality and why you must follow these
12. Basic legal requirements for data protection

Do basic number work

13. How to add, subtract, multiply and divide numbers
14. How to check figures against other sources of information
15. How to confirm figures are accurate
16. What the procedures are for forwarding checked items
17. What the reporting procedures are for inconsistencies

Scope/range

1. Telephone calls

1.1 to and from people inside your organisation

1.2 to and from people outside your organisation

2. Information sources

2.1 within the organisation

2.2 external sources

2.3 own notes

3. Person requesting information

3.1 inside your organisation

3.2 outside your organisation

4. Basic calculations

4.1 addition, subtraction, multiplication and division of whole numbers

4.2 addition, subtraction, multiplication and division of money to two decimal places

Glossary

Confidentiality

Not giving information to people who should not have it

Level of responsibility

What your organisation allows you to do and doesn't allow you to do

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