

FE2A 04 (CFACSA11) Deal with Incoming Telephone Calls From Customers

This Unit has the following Elements:

- A11.1 Use communication systems effectively.
- A11.2 Establish rapport with customers who are calling.
- A11.3 Deal effectively with customer questions and requests.

Unit Summary

This Unit is part of the Customer Service Theme of Impression and Image. This Theme covers the Customer Service behaviours and processes that have the 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 rely on dealing with incoming telephone calls as a key part of their customer service procedures. Customer expectations are high when calling organisations because they have had an opportunity to prepare for their call. In addition, a proportion of calls start with customers in a negative frame of mind because the caller sees making a call as a way of dealing with a customer service problem. This Unit is about being prepared to deal effectively with calls and using effective communication to satisfy customers with the outcome of each call.

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A11.1 Use communication systems effectively

Performance Criteria

You must consistently:

- A11.1.1 Operate telecommunication equipment efficiently and effectively.
- A11.1.2 Speak clearly and slowly and adapt your speech to meet the individual needs of your customer.
- A11.1.3 Listen carefully when collecting information from your customer.
- A11.1.4 Select the information you need to record and store following your organisation's guidelines.
- A11.1.5 Update your customer records during or after the call to reflect the key points of the conversation.

A11.2 Establish rapport with customers who are calling

Performance Criteria

You must consistently:

- A11.2.1 Greet your customer following your organisation's guidelines.
- A11.2.2 Listen closely to your customer to identify their precise reason for calling and what outcome they are seeking from the call.
- A11.2.3 Confirm the identity of your customer following organisational guidelines.
- A11.2.4 Use effective and assertive questions to clarify your customer's requests.

A11.3 Deal effectively with customer questions and requests

Performance Criteria

You must consistently:

- A11.3.1 Identify all the options you have for responding to your customer and weigh up the benefits and drawbacks of each.
- A11.3.2 Choose the option that is most likely to lead to customer satisfaction within the service offer.
- A11.3.3 Give clear and concise information to customers in response to questions or requests.
- A11.3.4 Use questions and answers to control the length of the conversation.
- A11.3.5 Keep your customer regularly informed about your actions when accessing information to provide responses or if they are going to be on hold for a period of time.
- A11.3.6 Put your customer on hold and ensure you cannot be heard if you are discussing action with others or calling a colleague.
- A11.3.7 Summarise the outcome of the call and any actions that you or your customer will take as a result.
- A11.3.8 Check before the call is finished that your customer is content that all their questions or requests have been dealt with.
- A11.3.9 Complete any follow up actions agreed during the call.
- A11.3.10 Take a clear message for a colleague if you are unable to deal with some aspect of your customer's questions or requests.
- A11.3.11 Ensure that promises to call back are kept.

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Knowledge and Understanding for the whole Unit

To be competent at dealing with incoming telephone calls from customers you need to know and understand:

- A11a Your organisation's guidelines and procedures for the use of telecommunication equipment.
- A11b How to operate your organisation's telecommunication equipment.
- A11c The importance of speaking clearly and slowly when dealing with customers by telephone.
- A11d The effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone.
- A11e The importance of adapting your speech to meet the needs of customers who may find your language or accent difficult to understand.
- A11f What information it is important to note during or after telephone conversations with customers.
- A11g Your organisation's guidelines and procedures for what should be said during telephone conversations with customers.
- A11h The importance of keeping your customer informed if they are on hold during a call.
- A11i The importance of not talking across an open line.
- A11j What details should be included if taking a message for a colleague.
- A11k Your organisation's guidelines and procedures for taking action to follow up calls made to customers.
- A11l Your organisation's guidelines for handling abusive calls.

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Evidence Requirements

- 1 Your evidence should be collected when carrying out a real job, whether paid or voluntary, and when dealing with real customers, whether internal or external to the organisation. However, for this Unit, evidence collected in a realistic working environment or a work placement is permissible. Simulation is not allowed for any performance evidence within this Unit. *(Guidelines for a Realistic Working Environment can be found in the Assessment Strategy for Customer Service S/NVQs at Levels 1, 2, 3 and 4 — February 2010)*
- 2 You may collect the evidence for the Unit through work in a private sector organisation, a not-for-profit organisation or a public services organisation.
- 3 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 4 You may provide evidence of dealing with customers using land line telephones, mobile telephone, internet telephone connections, video telephone systems or any other technology that involves a conversation with a customer at a distance.
- 5 Your evidence must include examples of dealing with customers who:
 - a have standard expectations of your organisation's customer service
 - b have experienced difficulties when dealing with your organisation
 - c have made a specific request for information
 - d need to be informed of circumstances of which they are unaware.
- 6 Your evidence must include examples of dealings with customers that are:
 - a planned
 - b unplanned.

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- 7 You must provide evidence of dealing with customers by telephone:
 - a during routine delivery of customer service
 - b during a busy time in your job
 - c during a quiet time in your job
 - d when people, systems or resources have let you down.

- 8 You must provide evidence that you have taken messages that are passed on to colleagues:
 - a verbally
 - b in a form that maintains a permanent record.

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Candidate Recording Form

No	Description of evidence	Performance Criteria								
		A11.1.1	A11.1.2	A11.1.3	A11.1.4	A11.1.5	A11.2.1	A11.2.2	A11.2.3	A11.2.4

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No	Description of evidence	Performance Criteria (continued)										
		A11.3.1	A11.3.2	A11.3.3	A11.3.4	A11.3.5	A11.3.6	A11.3.7	A11.3.8	A11.3.9	A11.3.10	A11.3.11

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No	Description of evidence	Knowledge and Understanding											
		A11a	A11b	A11c	A11d	A11e	A11f	A11g	A11h	A11i	A11j	A11k	A11l

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Notes/Comments

The candidate has satisfied the assessor and internal verifier that the performance evidence has been met.

Candidate's signature _____ **Date** _____

Assessor's signature _____ **Date** _____

Internal verifier's signature _____ **Date** _____