



UNIT 211

MAKE TELEPHONE CALLS TO CUSTOMERS

This unit is about planning and making calls to customers. The unit sits within the customer service theme of Impression and Image. This theme covers the organisational behaviours and processes that affect how your customers see you and your organisation.

WHY CUSTOMER SERVICE MATTERS TO... A MARKET RESEARCHER

Working as a researcher in a customer service environment requires that the calls made are carefully planned. Researchers must speak clearly, adapting their speech to meet the individual needs of the customer. Records also need to be maintained and it is important that data is updated during or after the call to reflect the key points of the conversation.

UNIT 211 (LEVEL 2 UNIT, 6 CREDITS)**MAKE TELEPHONE CALLS TO CUSTOMERS****What this unit is about**

Many customer service jobs involve contacting customers by telephone. Making an effective telephone call involves some very specific actions and should not be seen as a casual activity. By making a call to a customer you will have the opportunity to prepare and therefore be more likely to be able to lead the conversation in the direction you want it to go.

This unit is about planning and making calls to customers in a way that contributes positively to the organisation's customer service.

AN EXAMPLE

You have to contact one of your customers to let them know their order has been delayed. You prepare for the call by having all the information to hand and have possible answers to comments you expect from the customer. You introduce yourself and confirm you are talking to the correct person. You give the reason for the call, discuss it with the customer and summarise the future action as you close the call.

**What have you done in your workplace that is similar?
Write your answer in this space...**

...now talk to your assessor about how this could be turned into observed evidence.

Elements in this unit

When you have completed this unit, you will have proved that you:

211.1 can plan your calls effectively

211.2 can use communication systems effectively

211.3 can make focussed calls to your customer

211.4 know how to make telephone calls to customers.

Key words and phrases for this unit

assemble information

objective of the call

operate telecommunication equipment

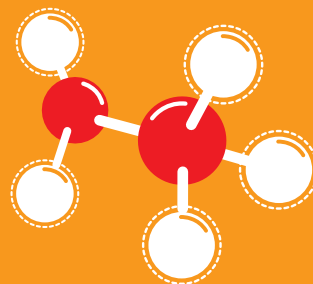
speak clearly

adapt speech

listen

update customer records

summarise



Evidence from this unit could possibly be cross-referenced to standards within other units, e.g. **101, 102, 103, 104, 105, 210, 203** or **205**.

You should note

- 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 landline telephones, mobile telephone, internet telephone connections, video telephone systems or any other technology that involves a conversation with a customer at a distance.

R

is for reliability

Customers expect any goods or services they purchase to be reliable. Reliability also applies to the service they get from you and others in the customer service role. If you promise a customer that, for example, you will call them back at a certain time they will expect that they can rely on you to do that – to deliver what you promised. If you don't, they will see you and the organisation as unreliable.

Assessed evidence

You need to show that you understand and are able to complete all the elements in this unit over a sufficient period of time, with different customers, on different occasions. Evidence may be gained through direct observation or products of work, recorded by your assessor and then referenced in the box below. On the next pages, these evidence references can be written in the relevant boxes of 'What you must cover', 'What you must do' and 'What you must know'.

Evidence reference	Evidence title	Assessment method

Assessment method key

O Observation **Q** Questioning **PE** Product Evidence
WT Witness Testimony **PD** Professional Discussion

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What you must cover

Evidence reference should be entered in the shaded areas below. You must cover **all** the points listed.

1 Your evidence must include examples of dealing with customers who:

- a are receptive to the content of your call

- b are not receptive to the content of your call.

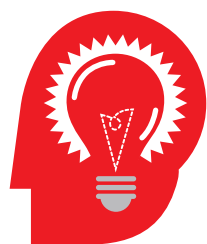
2 You must provide evidence of dealing with customers by telephone:

- a during routine delivery of customer service

- b during a busy time in your job

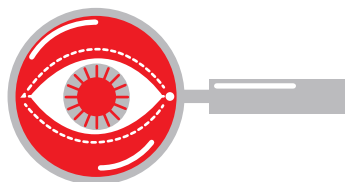
- c during a quiet time in your job

- d when people, systems or resources have let you down.



In the know...

Telephone equipment can carry out a variety of tasks now. Get to know your equipment – being familiar with its uses could greatly improve your performance.



Get it covered...

When making a telephone call it is important to plan it. Planning what you need to say and the information you either need to get from or put across to the customer is vital. Learn to think about a call before you make it.

What you must do

Evidence reference should be entered in the shaded areas below. You must do **all** the points listed.

211.1 To plan your calls effectively, you must:

211.1.1 use all appropriate customer information to plan your call

211.1.2 anticipate your customer's expectations and assemble all the information you might need before your conversation with the customer

211.1.3 identify the objective of your call and the way in which you expect the call to end

211.1.4 plan the opening part of your conversation with your customer and anticipate possible responses.

211.2 To use communication systems effectively, you must:

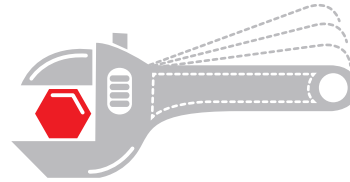
211.2.1 operate telecommunication equipment efficiently and effectively

211.2.2 speak clearly and slowly and adapt your speech to meet the individual needs of your customer

211.2.3 listen carefully when collecting information from your customer

211.2.4 select the information you need to record and store following your organisation's guidelines

211.2.5 update your customer records during or after the call to reflect the key points of the conversation.



What's good to do?

Be flexible – in customer service it is important to adapt your behaviour and language to suit the needs of the customer. However, there is a limit to how flexible you can be. You always need to balance the needs of the customer with those of the organisation.

211.3 To make focused calls to your customer, you must:

211.3.1 open the conversation positively and establish a rapport with your customer

211.3.2 confirm the identity of your customer following organisational guidelines

211.3.3 ensure that your customer is aware of the purpose of your call as early as possible

211.3.4 respond positively to queries and objections from your customer

211.3.5 summarise the outcome of the call and any actions that you or your customer will take as a result

211.3.6 complete any follow-up actions agreed during the call.

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What you must know

Evidence reference should be entered in the shaded areas below. You must know **all** the points listed.

211.4 To know how to make telephone calls to customers, you must be able to:

211.4.1 describe the relevant parts of legislation, external regulations and your organisation's procedures relating to the use of customer information to plan calls

211.4.2 describe your organisation's guidelines and procedures for the use of telecommunication technology

211.4.3 explain how to operate your organisation's telecommunication technology

211.4.4 explain the importance of speaking clearly and slowly when dealing with customers by telephone

211.4.5 describe the effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone

211.4.6 explain the importance of adapting your speech to meet the needs of customers who may find your language or accent difficult to understand

211.4.7 identify what information it is important to note during or after telephone conversations with customers

211.4.8 describe your organisation's guidelines and procedures for what should be said during telephone conversations with customers

211.4.9 describe your organisation's guidelines and procedures for taking action to follow up calls made to customers.

Unit sign-off

The evidence for this unit is valid, sufficient and an authentic record of the candidate's current competence and has been assessed under the requirements of the assessment strategy.

I confirm that the evidence provided is a result of my own work.

Signature of candidate	Date
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I confirm that the candidate has demonstrated competence by satisfying all of the criteria for this unit.

Signature of assessor	Date
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Countersignature of assessor	Date
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Signature of IV (if sampled)	Date
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Countersignature of IV	Date
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Signature of EV (if sampled)	Date
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