

SFJCCDA2.2

Make telephone calls to customers



Overview

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 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 have the opportunity to prepare and are therefore 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 your organisation's customer service.

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Performance criteria

You must be able to:

Plan your calls effectively

- P1 use all 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 expect the call to end
- P4 plan the opening part of your conversation with your customer and anticipate their possible responses

Use communication 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 your 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 your organisation's guidelines and procedures for the use of telecommunication technology
- K3 how to operate your organisation's telecommunication technology
- K4 the importance of speaking clearly and slowly when dealing with customers by telephone
- K5 the effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone
- K6 the importance of adapting your speech to meet the needs of customers who may find your language or accent difficult to understand
- K7 what information it is important to note during or after telephone conversations with customers
- K8 your organisation's guidelines and procedures for what should be said during telephone conversations with customers
- K9 your organisation's guidelines and procedures for taking action to follow up calls made to customers

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Relevant occupations	Public Services; Public Service Professionals; Government and Related Organisations
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Suite	NOS for Operational Delivery Contact Centre roles
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