

Unit 18: Making and Receiving Calls

Unit reference number: T/502/4007

QCF level: 1

Credit value: 2

Guided learning hours: 20

Unit aim

This unit aims to develop the learners' knowledge, skills and understanding of administrative tasks associated with making and receiving telephone calls or other suitable electronic equipment.

Unit introduction

In this unit learners will develop their communication skills when dealing with calls using the telephone or other suitable electronic equipment. Learners will be able to identify and use the correct protocols when making and receiving calls, and they will develop their awareness of the types of organisational procedures which must be followed.

Learners will also develop their knowledge of how to create a positive impression while making and receiving calls, and why it is important to an organisation that calls are handled correctly.

Essential resources

Centres need to have access to typical office equipment, such as a telephone and a computer, so that learners can practise and develop their skills when interacting with others.

Learning outcomes, assessment criteria and unit amplification

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

| Learning outcomes | | Assessment criteria | | Unit amplification |
|-------------------|--------------------------|---------------------|--|---|
| 1 | Be able to make calls | 1.1 | Identify the purpose of the call | <ul style="list-style-type: none"> □ <i>Making a call</i>: listening to instructions; identifying purpose of the call; confirming name and number of person to be contacted; asking questions if unsure; communicating information to achieve call purpose; summarising outcomes of the conversation before ending call; following instructions when making the call; giving clear, accurate information |
| | | 1.2 | Confirm the name and number of the person to be contacted before making the call | |
| | | 1.3 | Make a call communicating basic information clearly and accurately | |
| 2 | Be able to receive calls | 2.1 | Answer the call promptly and politely, observing any organisational procedures | <ul style="list-style-type: none"> □ <i>Answering a call</i>: following organisational procedures, e.g. answering call within set time; giving correct greeting; identifying caller and where they are calling from; identifying caller's needs; tone of voice; the need for clarity; listening; questioning; checking; providing accurate and up-to-date information; summarising outcomes of conversation before ending call |
| | | 2.2 | Identify the caller, where they are calling from and the reason for their call | |
| | | 2.3 | Follow any organisational procedures relating to confidentiality and security | |
| | | | | <ul style="list-style-type: none"> □ <i>Confidentiality and security</i>: types of confidential information, e.g. personal calls, calls concerning personal details, e.g. payment; calls concerning company sensitive information; danger in giving confidential details over the telephone; organisational procedures concerning confidentiality and security, e.g. only certain people have access to some types of information, certain types of information are not given over the telephone |

| Learning outcomes | | Assessment criteria | Unit amplification |
|-------------------|--|--|---|
| | | 2.4 Take short messages | <ul style="list-style-type: none"> □ <i>Taking messages</i>: summarising call; noting date, time, caller's name and number, purpose of call; the need for clear, accurate messages; level of urgency; action required by recipient |
| 3 | Know why it is important to an organisation that calls are handled appropriately | 3.1 State how appropriate tone and language create a positive impression | <ul style="list-style-type: none"> □ <i>Positive impression</i>: tone of voice; politeness; clarity; listening; questioning; checking information when taking message; providing accurate, up-to-date information |
| | | 3.2 State how creating a positive impression during a call benefits the organisation | <ul style="list-style-type: none"> □ <i>Benefits</i>: gives caller confidence in the organisation; if an accurate message is taken, the caller's needs can be dealt with more quickly; may lead to repeat business |

Information for tutors

Delivery

This is essentially a practical unit. It is important for learners to have the opportunity to demonstrate their communication skills when making and receiving calls. This may be under simulated conditions but within a realistic context. Learners can discuss, in a group or one to one, the different skills required when making and receiving calls.

Through role play and discussion, learners can participate in verbal communication activities on the telephone and be encouraged to provide constructive feedback on their peers' communication skills. Learners should be encouraged to focus actively on what others are communicating and to question things they are not sure about. Different scenarios should be provided so learners can practise communicating. Within a supportive classroom environment learners will have the opportunity to make positive contributions to discussions and this active involvement should help to develop confidence.

Useful activities to support delivery include discussions, visits to commercial organisations, role play and practical experience.

Learners should be provided with role-play scenarios so that they can practise making and receiving calls. Group or one-to-one discussions can look at procedures relating to security and confidentiality and the importance of giving a positive impression.

Outline learning plan

The outline learning plan has been included in this unit as guidance.

| Topic and suggested assignments/activities |
|---|
| Introduction to unit and structure of the programme of learning. Learners watch DVD on good telephone practice. Group discussion – what type of information is it necessary to be sure of before making a call? What type of information is it necessary to give while making the call? Learners to start compiling a checklist of good telephone communication skills. Role-play exercises – learners practise making calls and communicating information. Assessment – learners to be observed preparing to make and then making a call based on a scenario provided by the tutor (learning outcome 1). |
| Group discussion – why is it important to answer calls according to organisational procedures? Why are there specific procedures relating to confidentiality and security? Tutor to provide examples of organisational procedures for answering calls (these can be the centre's own procedures). Tutor-led discussion on the use of appropriate tone and language when making and receiving calls, and how this can benefit an organisation. Role-play exercises with peer observation – learners practise taking calls based on procedures provided by the tutor. Learners to recognise where the information requested may be confidential. Peer feedback on whether the learner created a positive impression. Group discussion – what information is it necessary to include when taking a message? |

Topic and suggested assignments/activities (continued)

Learners to add to their checklist of good telephone practice.

Assessment – learners to be observed receiving a call based on a scenario set by the tutor. They must write down at least two messages which should be retained as evidence (learning outcome 2).

Assessment – learners to record how to create a positive impression through the use of appropriate tone and language, and how this benefits the organisation for future reference (learning outcome 3).

Assessment feedback, review and evaluation of unit.

Assessment

Assessment criteria 1.1, 1.2, 1.3 and 2.1, 2.2, 2.3, 2.4 can be evidenced through simulated activity such as role play, with learners making and receiving calls. For 1.1 and 1.2, the tutor can give learners a scenario with some background to the call to be made. Learners will need to make the call to achieve 1.3 and be observed giving clear and accurate information. This will need to be evidenced through taped evidence or through a witness or observation statement.

To achieve 2.1 and 2.2, learners will need to take the call within a set timescale identifying the caller and purpose of the call politely, following any given organisational procedures. To achieve 2.3, they will need to observe any given procedures relating to confidentiality and/or security. To achieve 2.4, they will need to record a message. This may be written and include date, time, name of caller and purpose of call.

Assessment criteria 3.1 and 3.2 can be assessed through a group or one-to-one discussion with the tutor. Learners must identify how tone and language create a positive impression and, in 3.2, they must state two benefits of this for the organisation. These criteria should be evidenced through dictaphone or video evidence.

Suggested resources

Books

Barker A – *Improve Your Communication Skills* (Kogan Page, 2010)
ISBN 9780749456276

Lapsley A – *Business and Administration Student Handbook Level 1* (Council for Administration, 2011) ISBN 9780956773814

Tetley C – *Entry 3/Level 1 Business Administration Student Book* (Pearson, 2010)
ISBN 9781846909214

Websites

www.skillsca.org The Council for Administration

www.chalkface.com Worksheets on practical communication skills for the workplace