
Overview

This standard is about making, receiving or transferring telephone calls in line with organisational requirements. It includes communicating information to achieve the purpose of a call, providing callers with accurate and up-to-date information and projecting a positive image of the organisation. It is for administrators who make and receive telephone calls.

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Make and receive telephone calls

Performance criteria

Make calls

You must be able to:

- P1 identify the purpose of the call
- P2 obtain the name and numbers of the person to be contacted
- P3 make contact with the person
- P4 communicate information to achieve the purpose of the call
- P5 summarise the outcomes of the conversation before ending the call
- P6 report telephone system faults to the appropriate colleague

Receive calls

You must be able to:

- P7 answer the telephone according to organisational procedures
- P8 project a positive image of self and the organisation
- P9 identify the caller, where they are calling from and what they need
- P10 provide accurate and up-to-date information to callers while protecting confidentiality and security
- P11 take and pass on messages according to caller's needs
- P12 deal with problems in handling calls, referring to the appropriate person where necessary

Transfer calls

You must be able to:

- P13 transfer calls promptly, when appropriate
- P14 explain clearly, when a call cannot be transferred, the reason why and agree appropriate action with the caller
- P15 when callers are placed on hold, check regularly to see if they wish to continue to hold, in line with organisational procedures

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Knowledge and understanding

You need to know and understand:

- K1 the different features of telephone systems and how to use them
- K2 organisation structures and communication channels within an organisation
- K3 how to follow organisational procedures when making and receiving calls
- K4 the types of information that could affect confidentiality and security and how to handle these
- K5 how to identify problems and who to refer them to
- K6 how to report telephone system faults

Make calls

You need to know and understand:

- K7 the different methods that can be used to obtain the names and numbers of people that need to be contacted
- K8 how to use telephone systems to make contact with people inside and outside the organisation

Receive calls

You need to know and understand:

- K9 how to identify the caller and their needs

Transfer calls

You need to know and understand:

- K10 the information to be given when transferring calls, taking or leaving messages
- K11 how to identify the appropriate person to whom a call is transferred

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Additional Information

Skills

1. communicating
2. personal presentation
3. questioning
4. summarising

Links to other NOS Communications; Customer Service

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