

CFASAA212

Manage your own contacts



Overview

Make and receive telephone calls; deal with visitors or visitor for a colleague and your own post in the context of your job role.

Links: Self Administration

Specific skills

1. communicating
2. interpersonal skills
3. planning
4. organising
5. presenting yourself
6. quality checking
7. recording yourself
8. problem solving
9. using technology

CFASAA212

Manage your own contacts

Performance criteria

You must be able to:

Make and receive telephone calls

- P1 make and receive calls following agreed procedures
- P2 exchange information with callers and record important points
- P3 take accurate messages and pass them on to the correct person
- P4 transfer calls to the correct person
- P5 present a positive image of yourself and your organisation
- P6 safeguard confidential information

Deal with visitors

- P7 identify visitors and the reason for their visit
- P8 present a positive image of yourself and your organisation
- P9 follow security and other agreed procedures
- P10 pass on information about the visitor's arrival, where appropriate
- P11 help visitors feel welcome and make sure their needs are met

Deal with your own post

- P12 receive and sort your own incoming post in line with agreed procedures
- P13 pass on information that may be of use to colleagues
- P14 prepare your own outgoing post in line with agreed procedures
- P15 prepare items for urgent or special delivery, identifying the best options for despatch
- P16 arrange for courier service to collect outgoing post, where appropriate
- P17 add correct postage charge to outgoing post
- P18 record post and postage costs in line with agreed procedures

CFASAA212

Manage your own contacts

Knowledge and understanding

You need to know and understand:

- K1 your organisation's procedures for making and receiving telephone calls
- K2 the purpose and value of knowing your organisational structure
- K3 how to locate the correct people / departments that you need to speak to
- K4 the purpose and value of projecting a positive image of yourself and your organisation
- K5 how to speak on the telephone when making business calls including how to address different types of people
- K6 the purpose and value of identifying a caller and their needs
- K7 how to use telephone equipment to transfer calls
- K8 how to take and relay messages accurately
- K9 what is confidential information, why it should be safeguarded and how to do
- K10 the purpose and value of security and other agreed procedures and your responsibilities for following these
- K11 your role in receiving visitors
- K12 the types of visitors you receive, the requirements that they have and how to meet their needs
- K13 communication channels within your organisation
- K14 types of problems that may occur with
- K15 the purpose and value of receiving visitors in a professional way
- K16 the purpose and value of passing on information that may be of use to colleagues
- K17 the range of internal and external post services available and how to choose the most appropriate postal service
- K18 agreed, security and other procedures for handling post
- K19 the purpose and value of following security procedures when handling post

CFASAA212

Manage your own contacts

Developed by	CFA Business Skills @ Work
Version number	1
Date approved	November 2009
Indicative review date	November 2011
Validity	Current
Status	Original
Originating organisation	CFA Business Skills @ Work
Original URN	SAS /A212
Relevant occupations	Agriculture, Horticulture and Animal Care; Business, Administration and Law; Information and Communication Technology; Arts, Media and Publishing; Health, Public Services and Care; Medicine and Dentistry; Nursing and Subjects and Vocations Allie; Health and Social Care; Public Services; Child Development and Well Being; Horticulture and forestry; Animal care and veterinary science; Environmental conservation; Transportation operations and maintenance; Construction, Architecture; Urban, rural and regional planning; Retail and commercial enterprise; Retailing and wholesaling; Warehouse and distribution; Service enterprises; Hospitality and catering; Leisure, travel and tourism; Sport, leisure and recreation; Travel and tourism; Media and communication; Publishing and information services; Preparation for life and work; Preparation for work; Accounting and finance; Administration; Business management; Marketing and sales; Law and legal services
Suite	Self Administration NOS
Key words	communication, negotiation, planning ,organisation, presentation, recording, clients, customers, team members, information, colleagues, interpersonal skills, problem solving, audience, image, stakeholders, telephone, procedures, confidential, messages