CFABAA621 SQA Unit Code F93N 04
Make and receive telephone calls

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.

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

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

Additional Information

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

Links to other NOS   Communications; Customer Service

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