

Unit PPL1FOH4 (HL3M 04) Make and Receive Telephone Calls

I confirm that the evidence detailed in this unit is my own work.

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| **Candidate’s name** |  | **Candidate’s signature** |  | **Date** |
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I confirm that the candidate has achieved all the requirements of this unit.

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| **Assessor’s name** |  | **Assessor’s signature** |  | **Date** |
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| **Countersigning — Assessor’s name**  **(if applicable)** |  | **Countersigning — Assessor’s signature**  **(if applicable)** |  | **Date** |
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I confirm that the candidate’s sampled work meets the standards specified for this unit and may be presented for external verification.

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| **Internal verifier’s name** |  | **Internal verifier’s signature** |  | **Date** |
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| **Countersigning — Internal verifier’s name**  **(if applicable)** |  | **Countersigning — Internal verifier’s signature**  **(if applicable)** |  | **Date** |
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| **External Verifier’s initials and date (if sampled)** |  |

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| **Unit overview** |
| This unit is about using the telephone. It is for anyone in the organisation that regularly uses the telephone such as a receptionist or telephonist. This may be the initial contact a customer has with the establishment therefore it is important that receiving, making or transferring calls is carried out professionally and efficiently. Each organisation will have their own set of standards for doing this task but this unit looks at the minimum requirements necessary. |

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| **Sufficiency of evidence** |
| There must be sufficient evidence to ensure that the candidate can consistently achieve the required standard over a period of time in the workplace or approved realistic working environment. |

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| **Performance criteria** | |
| **What you must do:** | |
| There must be evidence for all Performance Criteria (PC). The assessor **must** assess PCs 1-5, 7-11 and 17 by directly observing the candidate’s work. PCs 6, 12-15 and 16 may be assessed by alternative methods if observation is not possible. | |
| **Make Calls**  **1 Identify the purpose of the call.**  **2 Obtain the name and numbers of the person to be contacted.**  **3 Make contact with the person required.**  **4 Communicate information to achieve the purpose of the call.**  **5 Summarise the outcomes of the conversation before ending the call.**  6 Report telephone system faults to the appropriate colleague.  **7 Project a positive image of self and the organisation at all times.**  **Receive calls**  **8 Answer the telephone according to organisational procedures.**  **9 Project a positive image of self and the organisation at all times.**  **10 Identify the caller, where they are calling from and what they need.**  **11 Provide accurate and up-to-date information to callers while protecting confidentiality and security.**  12 Take and pass on messages according to caller's needs.  13 Deal with problems in handling calls, referring to the appropriate person where necessary. | **Transfer calls**  14 Transfer calls promptly, when appropriate.  15 Explain when a call cannot be transferred, the reason why and agree appropriate action with the caller.  16 Check regularly to see if the caller wants to continue to hold if unable to connect to the required extension, in line with organisational procedures.  **17 Project a positive image of self and the organisation at all times.** |

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| **Evidence reference** | **Evidence description** | **Date** | **Performance criteria** | | | | | | | | | | | | | | | | |
| **What you must do** | | | | | | | | | | | | | | | | |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **10** | **11** | **12** | **13** | **14** | **15** | **16** | **17** |
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| **Knowledge and understanding** | | **Evidence reference**  **and date** |
| **What you must know and understand** | |
| For those knowledge statements that relate to **how** the candidate should do something, the assessor may be able to infer that the candidate has the necessary knowledge from observing their performance or checking products of their work. In **all** other cases, evidence of the candidate’s knowledge and understanding must be gathered by alternative methods of assessment (eg oral or written questioning). | |
| 1 | The different features of telephone systems and how to use them |  |
| 2 | Organisation structures and communication channels within an organisation |  |
| 3 | How to follow organisational procedures when making and receiving calls |  |
| 4 | The purpose of projecting a positive image of self and the organisation |  |
| 5 | The purpose and value of confidentiality and security when dealing with callers |  |
| 6 | The types of information that could affect confidentiality and security and how to handle these |  |
| 7 | The purpose of summarising outcomes of a telephone conversation before ending the call |  |
| 8 | How to identify problems and who to refer them to |  |
| 9 | How to report telephone system faults |  |
|  | **Make calls** |  |
| 10 | The reasons for identifying the purpose of a call before making it |  |
| 11 | The different methods that can be used to obtain the names and numbers of people that need to be contacted |  |
| 12 | How to use telephone systems to make contact with people inside and outside the organisation |  |
|  | **Receive calls** |  |
| 13 | How to identify the caller and their needs |  |
| 14 | The purpose of giving accurate and up-to-date information to callers |  |
|  | **Transfer calls** |  |
| 15 | The information to be given when transferring calls, taking or leaving messages |  |
| 16 | How to identify the appropriate person to whom a call is transferred |  |

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# Supplementary evidence

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| **Evidence** | | **Date** |
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| **Assessor feedback on completion of the unit** |
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