

**U30001: Make and receive telephone calls (Level 1)**

Unit Descriptor:

Use a telephone system to make, receive and transfer internal and external calls.

**At the end of this unit you will be able to apply the following skills:**

- Questioning
- Listening
- Communicating
- Presenting yourself
- Summarising
- Using technology
- Recording

**ELEMENT****PERFORMANCE CRITERIA**

*To be competent you must achieve the following:*

- |                  |  |
|------------------|--|
| 1. Make calls    | 1.1 Project a <b>positive image</b> of yourself and the organization.                          |
|                  | 1.2 Confirm the name and number of the person to be contacted.                                 |
|                  | 1.3 Identify the <b>purpose of the call</b> .  |
|                  | 1.4 Make contact with the person.  |
|                  | 1.5 Communicate information to achieve the <b>purpose of the call</b> .                        |
| 2. Receive calls | 2.1 Answer the phone according to your organisation's procedures.                              |
|                  | 2.2 Identify the caller, where they are calling from and what they need.                       |
|                  | 2.3 Record accurate information when receiving calls.  |
|                  | 2.4 Provide accurate and up-to-date information whilst protecting confidentiality and security |
|                  | 2.5 Transfer calls where requested.  |
|                  | 2.6 Take and relay messages according to the caller's needs.                                   |

**RANGE STATEMENT**

*You must cover the items below:*

**A. Purpose of call:**

- (i) Provide information
- (ii) Obtain information

**B. Positive image**

- (i) Appropriate tone
- (ii) Appropriate language

**UNDERPINNING KNOWLEDGE AND SKILLS**

*You will know:*

1. Why it is important to identify the purpose of a call before you make it.
2. How to use telephone systems to make contact with people inside and outside your organization.
3. Why it is important to project a positive image of yourself and your organization.
4. How to follow your organisation's procedures when making and receiving calls.
5. How to identify the caller and his/her needs.
6. Why it is important to give accurate and up-to-date information to callers
7. Why confidentiality and security are important when dealing with callers
8. How to identify the appropriate person to whom you should transfer a call.
9. The information you should give when transferring calls and taking messages.
10. Why it is important to record information accurately.

**EVIDENCE GUIDE**

*For assessment purposes:*

**(1) Critical Aspects of Evidence**

1. Evidence for this unit is generated when you carry out real work in a private sector, non-profit or public service organization, whether full-time, paid or voluntary.
2. Evidence for this unit may also be collected in an approved Realistic Working Environment or an extended work placement.
3. Evidence must show that you have consistently met the standard over a sufficient period of time for you to be considered competent.
4. You need to show that you:

Demonstrate a **Positive image** and understand **the Purpose of the call** in view of **all** of the following items of range:

**A. Positive image**

- (i) Appropriate tone
- (ii) Appropriate language

**B. Purpose of call:**

- (i) Provide information
- (ii) Obtain information

Candidates need to show that they:

**Make calls.** Evidence may include:

Scripts; notes and recordings.

**Receive calls.** Evidence may include.

Copy messages to colleagues; other relevant stationery; notes; recordings

Evidence will be generated for this unit while generating evidence for units at Level 2.

**(2) Methods of Assessment**

The following assessment methods can be used for this unit:

Observation of you by your assessor.

Performance evidence:            Observation  
   Examination of work results

Supplementary evidence:        Witness testimony  
   Questions\*

\*This includes verbal and written questioning, questionnaires, work based tasks, reflections, case studies, professional discussion and feedback reports.

Here are some examples to give you some ideas about the sort of evidence that can be used for:

Performance criterion 2.5:        Whether the transfer is from one extension to another or by handing the phone to a colleague, the candidate must demonstrate that they pass the information (written/recorded) gathered from the caller to the recipient.

**(3) Context of Assessment**

Simulation is not allowed for this unit.

**(4) Links to other units**

Evidence generated for this unit may contribute towards Units 101 and 102