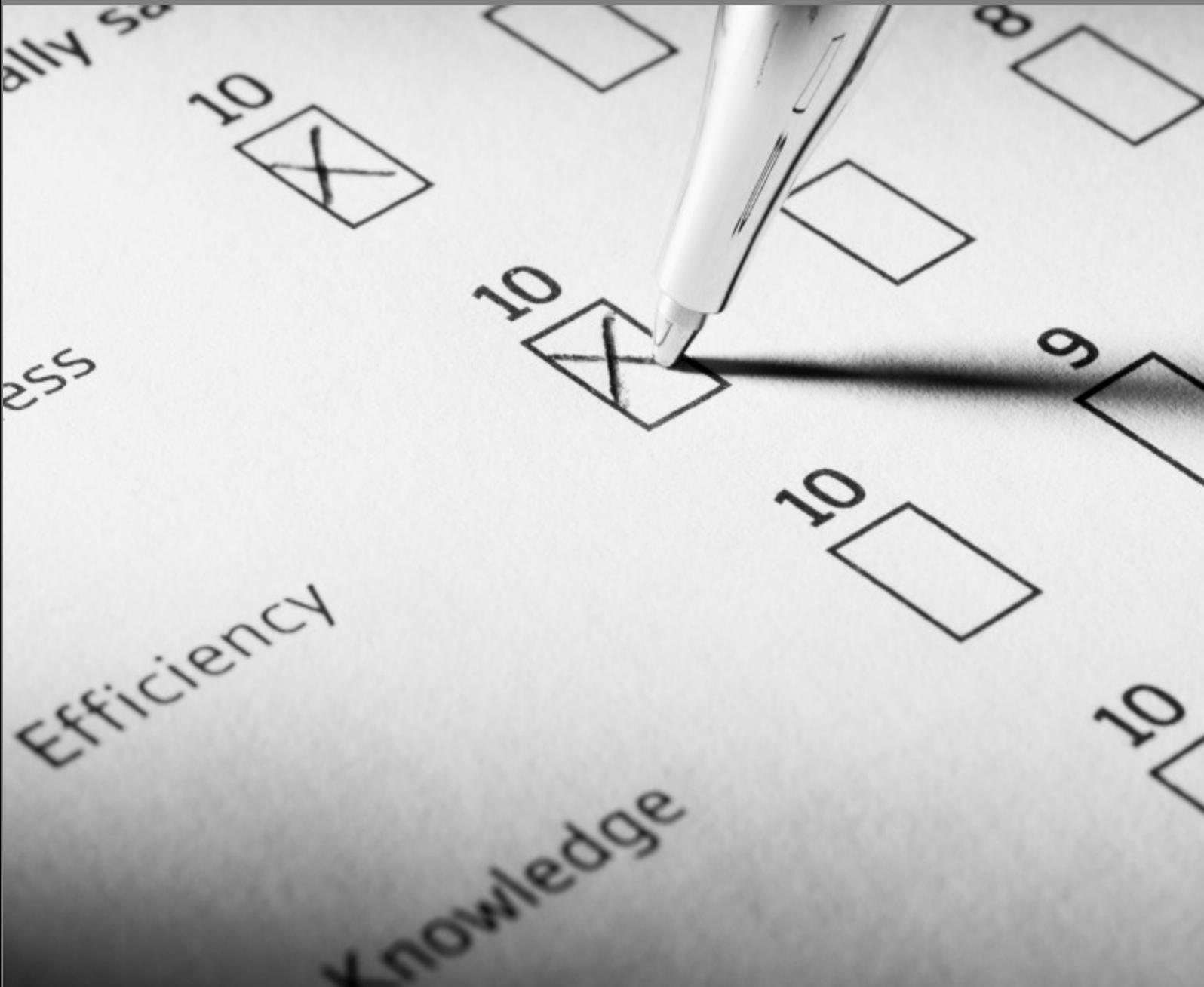




Facilitate outgoing phone calls

D1.HFO.CL2.10

Assessor Manual



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D1.HFO.CL2.10

Assessor Manual



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Angliss
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for foods, tourism
& hospitality

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Competency Based Assessment (CBA) – An Introduction for Assessors

Assessment is the process of identifying a participant's current knowledge, skills and attitudes sets against all elements of competency within a unit of competency.

Suggested Assessment Methods

For each unit of competency a number of assessment tools have been identified including:

- Work Projects
- Oral Questions
- Written Questions
- Third Party Statements
- Observation Checklists.

Instructions and Evidence Recording Sheets have been identified in this Assessment Manual for use by Assessors.

Alternative Assessment Methods

Whilst the above mentioned assessment methods are suggested assessment methods, the assessor may use an alternate method of assessment taking into account:

- a) The nature of the unit
- b) The strengths of participants
- c) The number of participants in the class
- d) Time required to complete assessments
- e) Time dedicated to assessment
- f) Equipment and resources required.

Alternate assessment methods include:

- Practical demonstrations
- Practical demonstrations in simulated work conditions
- Problem solving
- Portfolios of evidence
- Critical incident reports
- Journals
- Oral presentations
- Interviews
- Videos
- Visuals/slides/audiotapes
- Case Studies
- Log books

- Projects and Role plays
- Group projects
- Recognition of Prior Learning.

Whilst there is no specific instruction or evidence collection documents for all the alternative assessment methods, assessors can record competency in the 'Other' section within the 'Competency Recording Sheet'.

Selection of Assessment Methods

Each assessor will determine the combination of Assessment Methods to be used to determine Competency for each Competency Unit on a student by student basis.

'Sufficient' evidence to support the 'Pass Competent'/'Not Yet Competent' decision must be captured.

In practice this means a minimum of 2 – 3 Assessment Methods for each candidate for each Competency Element is suggested.

At least one method should provide evidence of practical demonstration of competence.

The following assessment methods deemed to provide evidence of practical demonstration of competence include:

- Practical Work Projects
- Third Party Statement
- Observation Checklist.

Assessing Competency

Competency based assessment does not award grades, but simply identifies if the participant has the knowledge, skills and attitudes to undertake the required task to the specified standard.

Therefore, when assessing competency, an assessor has two possible results that can be awarded:

- 'Pass Competent' (PC)
- 'Not Yet Competent' (NYC).

Pass Competent (PC)

If the participant is able to successfully answer or demonstrate what is required, to the expected standards of the performance criteria, they will be deemed as 'Pass Competent' (PC).

The assessor will award a 'Pass Competent' (PC) if they feel the participant has the necessary knowledge, skills and attitudes in all assessment tasks for a unit.

Not Yet Competent' (NYC)

If the participant is unable to answer or demonstrate competency to the desired standard, they will be deemed to be 'Not Yet Competent' (NYC).

This does not mean the participant will need to complete all the assessment tasks again. The focus will be on the specific assessment tasks that were not performed to the expected standards.

The participant may be required to:

- a) Undertake further training or instruction
- b) Undertake the assessment task again until they are deemed to be 'Pass Competent'.

Regional Qualifications Framework and Skills Recognition System

The 'Regional Qualifications Framework and Skills Recognition System', also known as the 'RQFSRS' is the overriding educational framework for the ASEAN region.

The purpose of this framework is to provide:

- A standardised teaching and assessment framework
- Mutual recognition of participant achievement across the ASEAN region. This includes achievement in individual Units of Competency or qualifications as a whole.

The role of the 'RQFSRS' is to provide, ensure and maintain 'quality assurance' across all countries and educational providers across the ASEAN region.

Recognition of Prior Learning (RPL)

Recognition of Prior Learning is the process that gives current industry professionals who do not have a formal qualification, the opportunity to benchmark their extensive skills and experience against the standards set out in each unit of competency/subject.

This process is a learning and assessment pathway which encompasses:

- Recognition of Current Competencies (RCC)
- Skills auditing
- Gap analysis and training
- Credit transfer.

Code of Practice for Assessors

This Code of Practice provides:

- Assessors with direction on the standard of practice expected of them
- Candidates with assurance of the standards of practice expected of assessors
- Employers with assurance of the standards maintained in the conduct of assessment.

The Code detailed below is based on the International Code of Ethics and Practice (The National Council for Measurement in Education [NCME]):

- The differing needs and requirements of the person being assessed, the local enterprise and/or industry are identified and handled with sensitivity
- Potential forms of conflict of interest in the assessment process and/or outcomes are identified and appropriate referrals are made, if necessary
- All forms of harassment are avoided throughout the planning, conducting, reviewing and reporting of the assessment outcomes
- The rights of the candidate are protected during and after the assessment
- Personal and interpersonal factors that are not relevant to the assessment of competency must not influence the assessment outcomes
- The candidate is made aware of rights and process of appeal

- Evidence that is gathered during the assessment is verified for validity, reliability, authenticity, sufficiency and currency
- Assessment decisions are based on available evidence that can be produced and verified by another assessor
- Assessments are conducted within the boundaries of the assessment system policies and procedures
- Formal agreement is obtained from both the candidate and the assessor that the assessment was carried out in accordance with agreed procedures
- The candidate is informed of all assessment reporting processes prior to the assessment
- The candidate is informed of all known potential consequences of decisions arising from an assessment, prior to the assessment
- Confidentiality is maintained regarding assessment results
- The assessment results are used consistently with the purposes explained to the candidate
- Opportunities are created for technical assistance in planning, conducting and reviewing assessment procedures and outcomes.

Instructions and Checklist for Assessors

Instructions

General instructions for the assessment:

- Assessment should be conducted at a scheduled time that has been notified to the candidate
- Facilitators must ensure participants are made aware of the need to complete assessments and attend assessment sessions
- If a participant is unable to attend a scheduled session, they must make arrangements with the Assessor to undertake the assessment at an alternative time
- At the end of the assessment the Assessor must give feedback and advise the participant on their PC/NYC status
- Complete the relevant documentation and submit to the appropriate department.

Preparation

- Gain familiarity with the Unit of Competency, Elements of Competency and the Performance Criteria expected
- Study details assessment documentation and requirements
- Brief candidate regarding all assessment criteria and requirements.

Briefing checklist

- Begin the assessment by implementing the following checklist and then invite the candidate to proceed with assessment.

Checklist for Assessors

	Tick (✓)	Remarks
Prior to the assessment I have:		
Ensured the candidate is informed about the venue and schedule of assessment.		
Received current copies of the performance criteria to be assessed, assessment plan, evidence gathering plan, assessment checklist, appeal form and the company's standard operating procedures (SOP).		
Reviewed the performance criteria and evidence plan to ensure I clearly understood the instructions and the requirements of the assessment process.		
Identified and accommodated any special needs of the candidate.		
Checked the set-up and resources for the assessment.		
During the assessment I have:		
Introduced myself and confirmed identities of candidates.		
Put candidates at ease by being friendly and helpful.		
Explained to candidates the purpose, context and benefits of the assessment.		
Ensured candidates understood the assessment process and all attendant procedures.		
Provided candidates with an overview of performance criteria to be assessed.		
Explained the results reporting procedure.		
Encouraged candidates to seek clarifications if in doubt.		
Asked candidates for feedback on the assessment.		
Explained legal, safety and ethical issues, if applicable.		
After the assessment I have:		
Ensured candidate is given constructive feedback.		
Completed and signed the assessment record.		
Thanked candidate for participating in the assessment.		

Instructions for Recording Competency

Specifications for Recording Competency

The following specifications apply to the preparation of Evidence Gathering Plans:

- A Competency Recording Sheet must be prepared for each candidate to ensure and demonstrate all Performance Criteria and Competency Elements are appropriately assessed. This Sheet indicates how the Assessor will gather evidence during their assessment of each candidate
- This Competency Recording Sheet is located at the end of the Assessment Plan
- It is the overriding document to record competency
- The Assessor may vary the Competency Recording Sheet to accommodate practical and individual candidate and/or workplace needs
- Assessor must place a tick (✓) in the 'Assessment Method' columns to identify the methods of assessment to be used for each candidate
- Multiple Competency Elements/Performance Criteria may be assessed at the one time, where appropriate
- The assessor and participant should sign and date the Competency Recording Sheet, when all forms of evidence and assessment have been completed
- The assessor may provide and feedback or clarify questions which the participant may have in regards to the assessment grade or findings
- All documents used to capture evidence must be retained, and attached to the Competency Recording Sheet for each candidate for each Competency Unit.

Instructions for Different Assessment Methods

Specifications for Work Project Assessment

These guidelines concern the use of work projects.

The work projects identified in the Training Manuals involve a range of tasks, to be performed at the discretion of the Assessor.

Work project tasks can be completed through any form of assessment as identified in the Trainer and Trainee Manuals and stated at the start of this section.

Assessors should follow these guidelines:

- Review the Work Projects at the end of each 'Element of Competency' in the Trainee Manual to ensure you understand the content and what is expected
- Prepare sufficient resources for the completion of work activities including:
 - Time – whether in scheduled delivery hours or suggested time participants to spend outside of class hours
 - Resources – this may involve technical equipment, computer, internet access, stationery and other supplementary materials and documents
- Prepare assessment location (if done in class) making it conducive to assessment
- Explain Work Projects assessment to candidate, at the start of each Element of Competency. This ensures that participants are aware of what is expected and can collate information as delivery takes place

- Assessors can use the following phrase as a guide (where an 'X' is identified, please input appropriate information):

“At the end of each Element of Competency there are Work Projects which must be completed. These projects require different tasks that must be completed.

These work projects are part of the formal assessment for the unit of competency titled X:

 - You are required to complete these activities:
 - a) *Using the 'X' method of assessment*
 - b) *At 'X' location*
 - c) *You will have 'X time period' for this assessment*
 - You are required to compile information in a format that you feel is appropriate to the assessment
 - Do you have any questions about this assessment?”
- Commence Work Project assessment:
 - The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
 - Participants complete work projects in the most appropriate format
 - Participants must submit Work Project evidence to the assessor before the scheduled due date
- Assessor must assess the participant's evidence against the competency standards specified in each Element of Competency and their own understanding. The assessor can determine if the participant has provided evidence to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Oral Question Assessment

These guidelines concern the use of oral questioning.

Assessors should follow these guidelines.

- Prepare Assessment Record for Oral Questioning. One record for each candidate:
 - Enter Student name
 - Enter Assessor name
 - Enter Location
- Familiarise self with Questions to be asked
- Prepare assessment location (table and chairs) making it conducive to assessment

- Explain Oral Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):
“These oral questions are part of the formal assessment for the unit of competency titled X.
There are X questions and you are required to answer all of them to the best of your ability and I will record whether or not you have answered correctly.
We have 60 minutes for this assessment.
 - I will give you feedback at the end of the assessment
 - Do you have any questions about this assessment?”
- Commence Oral Questioning assessment:
 - Complete Assessment Record for the Oral Questioning by:
 - a) Ticking PC or NYC, as appropriate
 - b) Entering 'Remarks' as required
 - c) Completing Oral Questioning within 60 minutes
- Complete Oral Questioning and provide feedback to candidate
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Written Question Assessment

These guidelines concern the use of written questioning.

Assessors should follow these guidelines:

- Familiarise self with Questions and Answers provided
- Print and distribute copies of 'Written Questions' for participants. Ideally this should take place with adequate time for participants to answer all questions before the expected due date
- Explain Written Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

“These written questions are part of the formal assessment for the unit of competency titled X.

There are X questions and you are required to answer all of them to the best of your ability.

You may refer to your subject materials, however where possible try to utilise your existing knowledge when answering questions.

Where you are unsure of questions, please ask the Assessor for further instruction. This may be answering the question orally or asking the assessor to redefine the question.

We have X time for this assessment:

- The due date for completion of this assessment is X
- On this date you must forward the completed questions to the assessor by X time on the date of X
- Do you have any questions about this assessment?”

- The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
- Participants may record written answers (where possible)
- Participants must submit the written answers to the assessor before the scheduled due date
- Assessor must assess the participant's written answers against the model answers provided as a guide, or their own understanding. The assessor can determine if the participant has answered the questions to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Observation Checklist

These specifications apply to the use of the Observation Checklist in determining competency for candidates.

Only an approved assessor is authorised to complete the Observation Checklist.

The assessor is required to observe the participant, ideally in a simulated environment or their practical workplace setting and record their performance (or otherwise) of the competencies listed on the Observation Checklist for the Competency Unit.

To complete the Observation Checklist the Assessor must:

- Insert name of candidate
- Insert assessor name
- Insert identify of location where observations are being undertaken
- Insert date/s of observations – may be single date or multiple dates
- Place a tick in either the 'Yes' or 'No' box for each listed Performance Criteria to indicate the candidate has demonstrated/not demonstrated that skill
- Provide written (and verbal) feedback to candidate – as/if appropriate
- Sign and date the form
- Present form to candidate for them to sign and date
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Observation Checklist.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the participant.

Specifications for Third Party Statement

These specifications relate to the use of a relevant workplace person to assist in determining competency for candidates.

The Third Party Statement is to be supplied by the assessor to a person in the workplace who supervises and/or works closely with the participant.

This may be their Supervisor, the venue manager, the Department Manager or similar.

The Third Party Statement asks the Supervisor to record what they believe to be the competencies of the participant based on their workplace experience of the participant. This experience may be gained through observation of their workplace performance, feedback from others, inspection of candidate's work etc.

A meeting must take place between the Assessor and the Third Party to explain and demonstrate the use of the Third Party Statement.

To complete the Third Party Verification Statement the Assessor must:

- Insert candidate name
- Insert name and contact details of the Third Party
- Tick the box to indicate the relationship of the Third Party to the candidate
- Present the partially completed form to the Third Party for them to finalise
- Collect the completed form from the Third Party
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Third Party Statement.

The Third Party must:

- Record their belief regarding candidate ability/competency as either:
 - Pass Competent = Yes
 - Not Yet Competent = No
 - Unsure about whether candidate is competent or not = Not Sure
- Meet briefly with the assessor to discuss and/or clarify the form.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the candidate.

A separate Third Party Statement is required for each Competency Unit undertaken by the candidate.

Competency Standard

UNIT TITLE: FACILITATE OUTGOING PHONE CALLS		NOMINAL HOURS: 20
UNIT NUMBER: D1.HFO.CL2.10		
UNIT DESCRIPTOR: This unit deals with skills and knowledge required to assist staff or guests to place outgoing telephone calls		
ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLE AND ASSESSMENT GUIDE	
<p>Element 1: Identify elements and facilities of the host enterprise telephone system</p> <p>1.1 Identify the <i>types of outgoing calls</i> that may be made and their importance to the business</p> <p>1.2 Identify the <i>components of the telephone system</i></p> <p>1.3 Describe the <i>functions and features available in the telephone system</i></p> <p>Element 2: Demonstrate appropriate telephone communication skills</p> <p>2.1 Interpret the <i>enterprise policies and procedures for telephone use</i> in regard to outgoing calls</p> <p>2.2 Differentiate between face-to-face and over-the-phone communications</p> <p>2.3 Use appropriate <i>telephone communication skills</i></p> <p>2.4 Use appropriate <i>telephone techniques</i></p> <p>2.5 Describe acceptable <i>telephone etiquette</i></p>	<p>Unit Variables</p> <p>The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment</p> <p>This unit applies to the assisting staff or guests to place outgoing telephone calls within the labour divisions of the hotel and travel industries and may include:</p> <p>1. Front Office</p> <p><i>Types of outgoing calls</i> that may be made may be related to:</p> <ul style="list-style-type: none"> • Contacting suppliers, support organisations, ordering stock and products • Contacting emergency services • Placing personal and private calls for staff, management, guests • Marketing and sales activities • Confirming reservations • Making bookings • Following-up a variety of situations • Responding to complaints • Returning calls. 	

Element 3: Place outgoing calls on behalf of the enterprise

3.1 Obtain required telephone number and details of business/person to be called

3.2 Determine *purpose of call*

3.3 Place call and establish contact with required business/person

3.4 Explain purpose of call

3.5 Transfer connected call to caller

3.6 Facilitate conference calls

3.7 Implement standard re-dial procedures as required

3.8 Log details of call in accordance with enterprise procedures

3.9 Place *emergency calls*

3.10 Enter commonly called numbers into system speed-dial facility

Element 4: Place outgoing calls on behalf of guests

4.1 Greet guest and determine call to be made

4.2 Obtain required telephone number and details of business/person to be called

4.3 Place call and establish contact with required business/person

4.4 Implement standard re-dial procedures as required

Components of the telephone system may include:

- Landline telephones, including multiple lines and multiple telephone numbers
- Mobile/cell phones
- Paging systems
- Switchboards
- Handsets and headsets
- Caller identification (ID) facilities, including VIP caller ID.

Functions and features available in the telephone system may be related to:

- Caller ID display
- Call return
- Transfer and transfer recall
- Placing calls 'on hold'
- Multiple chat facility
- Conference call
- Integration of facilities
- Speed-dial
- Automatic re-dial.

Enterprise policies and procedures for telephone use may include:

- Privacy and confidentiality issues
- Restrictions on personal use of business telephone, including bans on specific numbers
- Costing of telephone calls, including personal (staff) and guests
- Definitions of proper and improper use of equipment and facilities.

4.5 Log details of call in accordance with enterprise procedures

4.6 *Cost guest calls* for posting to account

- Standard phrases
- Authorities to use the system and nominated elements of it
- Training requirements
- Role of the telephone in the Emergency Management Plan.

Telephone communication skills could relate to:

- Conveying a helpful and positive attitude to those wishing to place a call
- Using the voice effectively and appropriately given the nature of the caller
- Applying effective listening and questioning skills
- Demonstrating positive speaking skills including clarity and the need to be concise
- Responding professionally to all manner of requests to make outgoing calls
- Choosing appropriate tone, volume and language.

Telephone techniques may include:

- Clarifying caller requirements
- Repeating names, dates and times
- Using the phonetic alphabet when clarifying caller details
- Realising the caller cannot read your facial expressions and understand other pressures that might be applicable at the time of their request for a call.

Telephone etiquette may address:

- Courtesy, civility and respect
- Reduction of background noise
- Correct operation of system functions in order to prevent caller frustration and optimise effectiveness and efficiency in placing required call

- Using outgoing caller name when known
- Thanking caller
- Asking caller if they would like to hold before placing them 'on hold'
- Advising caller of your intentions in respect to dealing with their outgoing call
- Advising caller of the name of the person to whom their call is being directed/transferred
- Apologising for delays, including never leaving a caller 'on hold' for longer than 30 seconds without some form of contact.

Obtain required telephone number may be related to:

- Consulting internal directories
- Consulting client directories
- Consulting external directories, electronic and hard copy, including local, regional, national and international
- Using external directory assistance
- Checking relevant documentation to obtain numbers and relevant details
- Checking internal databases.

Purpose of call could include:

- Returning call
- Making enquiry, clarifying information
- Seeking information
- Following-up
- Selling and marketing activities
- Placing order
- Networking call.

Log details of call could relate to:

- Recording date and time call was placed
- Recording name of person/business called
- Recording name of caller
- Recording call duration for long-distance and international calls
- Recording guest name and room number.

Emergency calls may include:

- Identifying and describing nature of emergency
- Giving precise location of premises and in-house emergency
- Adhering to emergency management plan guidelines.

Cost guest calls may relate to:

- Determining connection fee and cost per minute charges for call
- Identifying duration of call
- Calculating call charge using enterprise formula
- Recording charges on appropriate documentation
- Forwarding documentation to appropriate location for posting, including actual posting of charges where relevant electronic system permits this.

Assessment Guide

The following skills and knowledge must be assessed as part of this unit:

- Knowledge of the enterprise's policies and procedures in regard to telephone operation and implementation of the Emergency Management Plan
- Principles of telephone communication
- Knowledge of suitable list of local and international numbers and codes as appropriate to the enterprise and general caller requirements

- Ability to use the host enterprise telephone systems and facilities
- Ability to apply verbal communication, customer service, decision making, message taking and conflict resolution skills
- Ability to cope under pressure.

Linkages To Other Units

- Communicate on the telephone
- Receive and place incoming phone calls
- Provide information about in-house services
- Provide international (IDD) service information
- Develop and update local knowledge
- Maintain hospitality industry knowledge
- Receive and resolve customer complaints
- Work effectively with colleagues and customers
- Work in a socially diverse environment
- Promote products and services to customers
- Operate a telephone switchboard system, such as PABX.

Critical Aspects of Assessment

Evidence of the following is essential:

- Understanding of the functions and features of the host enterprise telephone system
- Demonstrated ability to implement enterprise policies on telephone use
- Demonstrated ability to communicate on the telephone
- Demonstrated ability to transfer calls to nominated people/extensions

- Demonstrated ability to place calls 'on hold'
- Demonstrated ability to place emergency calls
- Demonstrated ability to cost calls for guests accurately.

Context of Assessment

Assessment must ensure:

- Actual or simulated workplace application of telephone skills.

Resource Implications

Training and assessment must include the use of a real telephone system and real callers; and access to workplace standards, procedures, policies, guidelines, tools and equipment

Assessment Methods

The following methods may be used to assess competency for this unit:

- Observation of practical candidate performance
- Simulated activities
- Role plays
- Oral and written questions
- Third party reports completed by a supervisor
- Project and assignment work.

Key Competencies in this Unit

Level 1 = competence to undertake tasks effectively

Level 2 = competence to manage tasks

Level 3 = competence to use concepts for evaluating

	Key Competencies	Level	Examples
	Collecting, organising and analysing information	1	Develop commonly called lists of countries, companies and individuals
	Communicating ideas and information	2	Speak with callers, determine needs and respond appropriately
	Planning and organising activities	1	Prepare the area for work
	Working with others and in teams	2	Liaise with others to meet stated caller needs
	Using mathematical ideas and techniques	1	Calculate costs for outgoing calls to be posted to guest accounts, or charged against departments
	Solving problems	1	Determine time zone differences for callers; find country and other call codes
	Using technology	2	Operate the telephone system and its integrated elements

Oral Questions

Student name	
Assessor name	
Location/venue	
Unit of competency	Facilitate outgoing phone calls D1.HFO.CL2.10
Instructions	<ol style="list-style-type: none"> 1. Ask student questions from the attached list to confirm knowledge, as necessary 2. Place tick in boxes to reflect student achievement (Pass Competent 'PC' or Not Yet Competent 'NYC') 3. Write short-form student answer in the space provided for each question.

Questions	Response	
	PC	NYC
1. Describe the types of outgoing calls that may be made from your workplace identifying their importance to the business.	<input type="checkbox"/>	<input type="checkbox"/>
2. Describe the components of the telephone system in use at your workplace.	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
3. Tell me about two functions or features of your workplace telephone system – what are they and how do you use them?	<input type="checkbox"/>	<input type="checkbox"/>
4. Explain the workplace policies and procedures that apply to placing outgoing calls on behalf of the enterprise and on behalf of guests.	<input type="checkbox"/>	<input type="checkbox"/>
5. Explain how communicating over the telephone is different to communicating face-to-face.	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
6. Give me an example of two important telephone communication skills.	<input type="checkbox"/>	<input type="checkbox"/>
7. What is the phonetic alphabet and how should it be used when talking on the telephone?	<input type="checkbox"/>	<input type="checkbox"/>
8. Give me three examples of what you believe to be appropriate telephone technique when talking to someone to whom you have placed a call on behalf of the business where you work.	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
9. Your employer has asked you to find the telephone number for a local electrician: how will you find this number?	<input type="checkbox"/>	<input type="checkbox"/>
10. Why is it important to determine the purposes of a call before you place the call?	<input type="checkbox"/>	<input type="checkbox"/>
11. Using your workplace telephone system as the basis for your answer, describe how to place a call to a local number.	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
12. Why is it useful to explain the purpose of a call when connected to the business/person you have placed a call to?	<input type="checkbox"/>	<input type="checkbox"/>
13. How do you transfer a call using your workplace telephone system?	<input type="checkbox"/>	<input type="checkbox"/>
14. Explain how to organise and implement a 'conference call' using your workplace telephone system.	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
15. A number you have rung when making a call for the business rings out without answering: what are the redial protocols in your workplace for this situation?	<input type="checkbox"/>	<input type="checkbox"/>
16. What calls does your workplace require you to log, and what details of those calls must be recorded?	<input type="checkbox"/>	<input type="checkbox"/>
17. You have been told to ring the fire brigade because there is a fire in the store room: tell me how you would handle this call. What would you do, and what would you say?	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
18. Explain to me how you would enter a telephone number into the speed-dial facility of your workplace telephone system.	<input type="checkbox"/>	<input type="checkbox"/>
19. A guest has rung and asked you to place a call on their behalf to their brother in Italy: what information would you ask this guest for in order to comply with their request?	<input type="checkbox"/>	<input type="checkbox"/>
20. You have been asked for a telephone number of a Mr Richard Thomas living in Mildura, Victoria, Australia: how will you find this number?	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
21. Tell me how you would find the country code/international dialling sequence for placing a call to Hereford, England.	<input type="checkbox"/>	<input type="checkbox"/>
22. What are the redial procedures in your workplace if you call an international number for a guest and the number is engaged?	<input type="checkbox"/>	<input type="checkbox"/>
23. What details of an international call placed on behalf of a guest are logged in your workplace and why are they recorded?	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
24. How would you determine the rate to be charged for a five-minute call placed by you for a guest to Paris, France?	<input type="checkbox"/>	<input type="checkbox"/>

Written Questions

Facilitate outgoing phone calls – D1.HFO.CL2.10

Student Name: _____

Answer all the following questions and submit to your Trainer.

1. Why are calls from sales and marketing important to the business?

2. Suggest 3 pieces of information you need to consider when calling suppliers.

3. Name 3 components of the telephone system.

4. Describe 4 functions and features available on a telephone system.

5. What is call recall?

6. Suggest 3 differences between face-to-face communication and the telephone.

7. How are calls costed?

8. List 3 areas relating to the voice volume and tone while on the telephone.

9. Discuss 3 points to remember for listening skills.

10. List 5 letters in the phonetic alphabet – and the words that go with them

11. On what ring should you answer the telephone?

12. In telephone etiquette what should you avoid?

13. Who should hang up first?

14. Where would I get a telephone number from for a guest?

15. Name 3 types of directories.

16. Name 2 purposes of a phone call.

17. Why is it important to establish contact with the required person?

18. What skill is needed when transferring a call?

19. What are the 3 stages of dealing with a conference call?

20. How many steps are there in the redialling process?

21. List 3 things you will need to record when logging calls.

22. Who is likely to place emergency calls?

23. Why do we enter commonly called numbers into the speed dial facility?

24. What is an establishment's greeting phrase?

25. What is directory assistance?

26. How would you talk to the guest to let them know you have established contact with the person required?

27. How do you redial a call?

28. Where does a PMS system log the details of the guests' calls?

29. How do hotels make money out of phone calls?

Answers to Written Questions

Facilitate outgoing phone calls – D1.HFO.CL2.10

The following are model answers only – Trainers/Assessors must use discretion when determining whether or not an answer provided by a Student is acceptable or not.

1. Why are calls from sales and marketing important to the business?

The Sales and Marketing department needs to promote the venue's services and facilities with the intention of attracting customers. This has opened up a whole new field of marketing opportunities. All this adds to the service you are providing and saves you time as well as increasing your revenue

2. Suggest 3 pieces of information you need to consider when calling suppliers.

- Make sure the person you are talking to is the person who is able to help you
- Knowing the name of the person who assists you is the first rule of receiving good service
- Keep your contact information updated with details of your suppliers' representatives
- Have the numbers programmed into your telephone system.
- Suppliers can help you place an order.

3. Name 3 components of the telephone system.

- Mobile phones
- Pagers
- Switchboards
- Handsets
- Headsets
- Caller identification.

4. Describe 4 functions and features available on a telephone system.

- Caller ID
- Transfer a call
- Transfer recall
- Call return
- Calls on hold
- Multiple chat facilities
- Speed dial
- Automatic redial
- Conference call.

5. What is call recall?

- Call return or last call return as it is also known, is a telephony feature offered by a telephone service provider to give a called party the time and telephone number of the last received call
- Call return can also be when a call is not answered - the call can be returned to the switchboard.

6. Suggest 3 differences between face to face communication and the telephone.

- Immediate response
- Body language
- Eye contact
- Last longer
- Better relationship.

7. How are calls costed?

Calls made by either staff or guests are charged according to the number of units or "pulses" (sound that represents a unit of time and therefore a dollar value) which creates a charge for the call.

8. List 3 areas relating to the voice, volume and tone while on the telephone.

- Use your voice effectively. Some of us have more authoritative voices while others have quiet soft voices. Try to project a middle of the range voice.
- The rate at which you speak
- Speak directly into the mouthpiece
- If your pitch is too monotone or too high it can be undesirable
- Keep your voice at a reasonable volume - louder doesn't mean clearer
- Your tone should vary along with inflections - but try and keep it sounding normal.

9. Discuss 3 points to remember for listening skills.

- Give the caller your full attention
- Make sure your mind is focused on the job
- Let the caller finish before you begin to talk
- Let yourself listen before you begin to talk
- Listen for the most important points.

10. List 5 letters in the phonetic alphabet and the words that go with them

Phonetic Alphabet			
• A - Alpha	• H - Hotel	• O - Oscar	• V - Victor
• B - Bravo	• I - India	• P - Papa	• W - Whisky
• C - Charlie	• J - Juliet	• Q - Quebec	• X - X-ray
• D - Delta	• K - Kilo	• R - Romeo	• Y - Yankee
• E - Echo	• L - Lima	• S - Sierra	• Z - Zulu
• F - Foxtrot	• M - Mike	• T - Tango	
• G - Golf	• N - November	• U - Umbrella	

11. On what ring should you answer the telephone?

Second or third.

12. In telephone etiquette what should you avoid?

Use of jargon, extreme volume; never eat, drink or smoke on the phone.

13. Who should hang up first?

The caller.

14. Where would I get a telephone number from for a guest?

Directory.

15. Name 3 types of directories.

- Internal directory
- Client directory
- Local directory
- Regional directory
- International directory.

16. Name 2 purposes of a phone call.

- Returning a call or following up on a previous request or message
- Making an enquiry - clarifying information, checking on what is available
- Seeking information
- Selling and marketing activities to promote the enterprise.

17. Why is it important to establish contact with the required person?

- To ensure you have the correct place and the person is available
- Explain the purpose of a call
- Returning a call or following up on a previous request or message
- Making an enquiry - clarifying information, checking on what is available
- Seeking information
- Selling and marketing activities to promote the enterprise.

18. What skill is needed when transferring a call?

- Knowing the telephone system
- Know the correct procedures.

19. What are the 3 stages of dealing with a conference call?

Before the call, during the call, and after the call.

20. How many steps are there in the redialling process?

2 – Press the code and the redial button.

21. List 3 things you will need to record when logging calls

- Record the date and time the call was placed
- Record the details of any overseas calls
- Record the name of the business/person called
- Duration of the call especially for international and long distance calls
- Record the guest name and room number.

22. Who is likely to place emergency calls?

Telephonist or receptionist.

23. Why do we enter commonly called numbers into the speed dial facility?

To save time and be more efficient.

24. What is an establishment's greeting phrase?

Good morning/afternoon/evening, Hotel X, Linda speaking, how may I help you?

25. What is directory assistance?

Assistance from an operator to find a number when you need to make a call.

26. How would you talk to the guest to let them know you have established contact with the person required?

- "Good afternoon, Hawthorn Manufacturing, Philip speaking, how may I help you?"
- You reply: " This is the Eclipse Hotel calling on behalf of Mr. Todd, we are wanting to speak to a Mr. Snyder in Marketing please"
- Business: " Yes, I will put you through"
- You to Mr. Snyder: "Hello Mr Snyder, I have Mr Todd on the line for you, one moment and I will put him through"
- You to Mr. Todd: "Mr. Todd, I have Mr. Snyder for you. I will connect him you now."

27. How do you redial a call?

Press the redial button.

28. Where does a PMS system log the details of the guests' calls?

The guest folio.

29. How do hotels make money out of phone calls?

- They charge a surcharge
- They charge for every call made - even non-connected calls.

Observation Checklist

Student name	
Assessor name	
Location/venue	
Unit of competency	Facilitate outgoing phone calls D1.HFO.CL2.10
Dates of observation	
Instructions	<ol style="list-style-type: none"> 1. Over a period of time observe the student completing each of the following tasks: <ol style="list-style-type: none"> a) Identify elements and facilities of the host enterprise telephone system b) Demonstrate appropriate telephone communication skills c) Place outgoing calls on behalf of the enterprise d) Place outgoing calls on behalf of guests 2. Enter the date on which the tasks were undertaken 3. Place a tick in the box to show they completed each aspect of the task to the standard expected in the enterprise 4. Complete the feedback sections of the form, if required.

Did the candidate	Yes	No
Element 1: Identify elements and facilities of the host enterprise telephone system		
Identify the types of outgoing calls that may be made and their importance to the business	<input type="checkbox"/>	<input type="checkbox"/>
Identify the components of the telephone system	<input type="checkbox"/>	<input type="checkbox"/>
Describe the functions and features available in the telephone system	<input type="checkbox"/>	<input type="checkbox"/>
Element 2: Demonstrate appropriate telephone communication skills		
Interpret the enterprise policies and procedures for telephone use in regard to outgoing calls	<input type="checkbox"/>	<input type="checkbox"/>
Differentiate between face-to-face and over-the-phone communications	<input type="checkbox"/>	<input type="checkbox"/>
Use appropriate telephone communication skills	<input type="checkbox"/>	<input type="checkbox"/>

Did the candidate	Yes	No
Use appropriate telephone techniques	<input type="checkbox"/>	<input type="checkbox"/>
Describe acceptable telephone etiquette	<input type="checkbox"/>	<input type="checkbox"/>
Element 3: Place outgoing calls on behalf of the enterprise		
Obtain required telephone number and details of business/person to be called	<input type="checkbox"/>	<input type="checkbox"/>
Determine purpose of call	<input type="checkbox"/>	<input type="checkbox"/>
Place call and establish contact with required business/person	<input type="checkbox"/>	<input type="checkbox"/>
Explain purpose of call	<input type="checkbox"/>	<input type="checkbox"/>
Transfer connected call to caller	<input type="checkbox"/>	<input type="checkbox"/>
Facilitate conference calls	<input type="checkbox"/>	<input type="checkbox"/>
Implement standard re-dial procedures as required	<input type="checkbox"/>	<input type="checkbox"/>
Log details of call in accordance with enterprise procedures	<input type="checkbox"/>	<input type="checkbox"/>
Place emergency calls	<input type="checkbox"/>	<input type="checkbox"/>
Enter commonly called numbers into system speed-dial facility	<input type="checkbox"/>	<input type="checkbox"/>
Element 4: Place outgoing calls on behalf of guests		
Greet guest and determine call to be made	<input type="checkbox"/>	<input type="checkbox"/>
Obtain required telephone number and details of business/person to be called	<input type="checkbox"/>	<input type="checkbox"/>
Place call and establish contact with required business/person	<input type="checkbox"/>	<input type="checkbox"/>
Implement standard re-dial procedures as required	<input type="checkbox"/>	<input type="checkbox"/>
Log details of call in accordance with enterprise procedures	<input type="checkbox"/>	<input type="checkbox"/>
Cost guest calls for posting to account	<input type="checkbox"/>	<input type="checkbox"/>
Did the student's overall performance meet the standard?	<input type="checkbox"/>	<input type="checkbox"/>

Feedback to student and trainer/assessor			
Strengths:			
Improvements needed:			
General comments:			
Candidate signature		Date	
Assessor signature		Date	

Third Party Statement

Student name:			
Name of third party:		Contact no	
Relationship to student:	<input type="checkbox"/> Employer <input type="checkbox"/> Supervisor <input type="checkbox"/> Colleague <input type="checkbox"/> Other <i>Please specify: _____</i> <i>Please do not complete the form if you are a relative, close friend or have a conflict of interest]</i>		
Unit of competency:	Facilitate outgoing phone calls D1.HFO.CL2.10		
<p>The student is being assessed against industry competency standards and we are seeking your support in the judgement of their competence.</p> <p>Please answer these questions as a record of their performance while working with you. Thank you for your time.</p>			

Do you believe the trainee has demonstrated the following skills? <i>(tick the correct response]</i>	Yes	No	Not sure
Identifies the types of outgoing calls that may be made and their importance to the business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identifies components, functions and features of the telephone system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Applies policies and procedures regarding telephone use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demonstrates appropriate telephone and communication skills as well as appropriate telephone etiquette	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Differentiates communication styles for face-to-face and telephone communication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Places outgoing calls on behalf of the business demonstrating obtaining correct number and determining purpose of the call	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Establishes contact with the required person and explains purpose of call	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facilitates conferences calls	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Implements standard re-dial procedures and logs calls as required	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demonstrates how to place emergency calls	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Do you believe the trainee has demonstrated the following skills? <i>(tick the correct response)</i>	Yes	No	Not sure
Enters required numbers into speed dial facility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Places calls on behalf of guests in a polite and professional manner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Obtains numbers for guests, places call, re-dials where required and connects guest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Logs and costs guest calls for posting to account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments/feedback from Third Party to Trainer/Assessor:			
Third party signature:		Date:	
Send to:			

Competency Recording Sheet

Name of Student		
Name of Assessor/s		
Unit of Competency	Facilitate outgoing phone calls	D1.HFO.CL2.10
Date assessment commenced		
Date assessment finalised		
Assessment decision	Pass Competent / Not Yet Competent (Circle one)	
Follow up action required (Insert additional work and assessment required to achieve competency)		
Comments/observations by assessor/s		

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 1: Identify elements and facilities of the host enterprise telephone system						
Identify the types of outgoing calls that may be made and their importance to the business						
Identify the components of the telephone system						
Describe the functions and features available in the telephone system						
Element 2: Demonstrate appropriate telephone communication skills						
Interpret the enterprise policies and procedures for telephone use in regard to outgoing calls						
Differentiate between face-to-face and over-the-phone communications						
Use appropriate telephone communication skills						
Use appropriate telephone techniques						
Describe acceptable telephone etiquette						

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 3: Place outgoing calls on behalf of the enterprise						
Obtain required telephone number and details of business/person to be called						
Determine purpose of call						
Place call and establish contact with required business/person						
Explain purpose of call						
Transfer connected call to caller						
Facilitate conference calls						
Implement standard re-dial procedures as required						
Log details of call in accordance with enterprise procedures						
Place emergency calls						
Enter commonly called numbers into system speed-dial facility						

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 4: Place outgoing calls on behalf of guests						
Greet guest and determine call to be made						
Obtain required telephone number and details of business/person to be called						
Place call and establish contact with required business/person						
Implement standard re-dial procedures as required						
Log details of call in accordance with enterprise procedures						
Cost guest calls for posting to account						
Candidate signature:			Date:			
Assessor signature:			Date:			

William
Angliss
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Specialist centre
for foods, tourism
& hospitality



**Australian
Aid** 