

UNIT TITLE: RECEIVE AND PLACE INCOMING TELEPHONE CALLS		NOMINAL HOURS: 15
UNIT NUMBER: D1.HFO.CL2.09		
UNIT DESCRIPTOR: This unit deals with skills and knowledge required to receive incoming calls and to deal effectively with them by transferring and/or re-directing them, as appropriate, or by taking other suitable action within the travel industries workplace context.		
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 incoming calls</i> that may be received 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 incoming calls</p> <p>2.2 Explain the importance of first impressions in relation to telephone answering and the reputation of the business</p> <p>2.3 Differentiate between face-to-face and over-the-phone communications</p> <p>2.4 Use appropriate <i>telephone communication skills</i></p> <p>2.5 Use appropriate <i>telephone techniques</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 all industry sectors that receive and place incoming 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 incoming calls</i> may be related to:</p> <ul style="list-style-type: none"> • Enquire • Enquiries • Reservations • Complaints • Messages for management, staff and guests • Clarification of orders from suppliers • Return calls <p><i>Components of the telephone system</i> may include:</p> <ul style="list-style-type: none"> • Landline telephones, including multiple lines and multiple telephone numbers • Mobile/cell phones • Paging systems 	

2.6 Describe acceptable *telephone etiquette*

2.7 Identify *common caller complaints* about telephoning a business

Element 3: Receive incoming calls

3.1 *Prepare to receive* incoming calls

3.2 *Answer calls* promptly in accordance with house standards

3.3 Identify long-distance or international calls

3.4 *Establish purpose* of incoming calls

3.5 *Respond to caller requests*, where appropriate

3.6 *Take messages* from callers

3.7 *Relay messages* and follow-up as necessary

3.8 Facilitate conference calls

3.9 Deal with *suspicious or threatening calls*

3.10 Manage *difficult callers*

3.11 *Prepare voicemail messages* and background music

Element 4: Re-direct incoming calls

4.1 *Transfer calls* as appropriate

4.2 *Place calls on hold* as appropriate

- Switchboards
- Handsets and headsets
- Caller identification facilities, including VIP caller ID.

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

- Call waiting
- Call forwarding
- Caller ID display
- Line blocking
- Call back busy
- No answer, and busy-no answer
- Call return
- Recorded message service
- Executive busy override
- Transfer and transfer recall
- Placing calls on hold
- Multiple chat facility
- Conference call
- Integration of facilities.

Enterprise policies and procedures for telephone use may include:

- Privacy and confidentiality issues
- Response to threatening or suspicious calls
- Standard greetings
- Authorisation(s) to use the system and nominated elements of it

- Training requirements
- Stated priorities for in-person customers in relation to telephone callers.

Telephone communication skills should relate to:

- Conveying a helpful and positive attitude
- Using the voice effectively and appropriately given the nature of the incoming call
- Applying effective listening and questioning skills
- Demonstrating positive speaking skills, including clarity and the need to be concise
- Responding professionally to all manner of incoming calls
- Choosing appropriate tone, volume and language to use in response to each incoming call
- Screening calls, as required.

Telephone techniques may include:

- Clarifying caller requirements
- Repeating back 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 call.

Telephone etiquette must address:

- Courtesy, civility and respect
- Reduction of background noise
- Correct operation of system functions to prevent caller frustration
- Using the caller's 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 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
- Allowing caller to hang up before terminating the call.

Common caller complaints may include:

- Telephone rings too long before being answered
- Being placed on hold for too long
- Inability to get through, such as the line/number is always busy
- Receptionist becomes defensive or abusive when asked for their name
- Failure to determine where the call should be directed
- Failure to listen
- Incompetence with the system; for example, the caller is disconnected when being transferred
- Lack of professionalism, including failure to place call on hold before talking to colleagues, giving an inappropriate greeting, lack of knowledge about the establishment and its staff
- Improper tone of voice used by receptionist.

Prepare to receive calls may relate to:

- Organising the work area
- Obtaining or preparing internal telephone list, including for staff and guests
- Obtaining list of internal extension numbers
- Obtaining telephone system user manual/s
- Eliminating distraction.

Answer calls may relate to:

- Answering before house ring limit is reached
- Using host enterprise standard greeting
- Identifying self and enterprise, greeting caller and making an offer of assistance
- Focusing and concentrating on the call
- Taking notes
- Identifying whether caller is calling long-distance or internationally
- Identifying if caller is a designated VIP caller
- Screening calls
- Placing existing calls on hold to answer incoming call.

Establish purpose may include:

- Clarifying caller need
- Asking questions
- Repeating information supplied by caller, including paraphrasing to confirm understanding
- Seeking extra information.

Respond to caller requests may involve:

- Answering caller queries
- Seeking more information from caller
- Apologising where an immediate, correct response cannot be given
- Transferring call to the correct/more appropriate extension
- Asking caller if they would like to hold or if they would prefer to be called back
- Following-up.

Take messages should include:

- Offering voicemail alternative, if applicable
- Identifying who message is for
- Clarifying spelling of names
- Obtaining and checking relevant dates, times and numbers
- Repeating back all details
- Noting action required and urgency of message.

Relay messages may relate to:

- Notifying person verbally
- Lodging message in pigeon-hole or message book
- Activating internal message waiting system
- Using internal paging system
- Returning to the caller to advise of progress of message.

Suspicious or threatening calls may relate to:

- Capturing as much detail as possible about the call, caller and nature of the threat
- Notifying management and other staff
- Initiating an evacuation or implementation of the Emergency Management Plan (EMP)
- Notifying relevant authorities
- Assisting in calling department and room numbers to facilitate the warning of people in accordance with the Emergency Management Plan.

Difficult callers may include:

- Callers using a different language
- Aggressive and abusive callers

- Rude and impatient callers
- Intoxicated callers.

Prepare voicemail messages may relate to:

- Determining the content of the message
- Determining appropriate background music
- Recording messages for callers who have been placed on hold
- Recording messages for callers who are being transferred
- Recording messages for individuals where there is no answer on the extension
- Recording out of hour messages
- Recording call waiting messages.

Transfer calls may include:

- Determining name of caller and purpose of call
- Thanking caller for the call
- Advising caller of intention to transfer the call
- Notifying to whom/where the call is to be transferred
- Announcing call, if applicable.

Place calls on hold may include:

- Advising caller of intention to place them on hold
- Asking caller if they would prefer to be called back instead of being placed on hold
- Thanking caller and apologising for delay
- Keeping in regular contact with all on hold calls and enquiring if they are still prepared to wait.

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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
- Knowledge of the principles of telephone communication
- Knowledge of the products, including knowledge about the host enterprise, staff, services offered, rates, contact details
- 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
- Facilitate out-going 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 (PABX) switchboard.

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 answer calls and respond to a range of nominated enquiries
- Demonstrated ability to transfer calls to nominated people/extensions
- Demonstrated ability to place calls on hold
- Demonstrated ability to record telephone voice messages
- Demonstrated ability to take and effectively process telephone messages
- Demonstrated ability to deal with a nominated range of suspicious, threatening and difficult telephone callers
- Demonstrated ability to apply appropriate telephone techniques and etiquette.

Context of Assessment

This unit may be assessed on or off the job:

- Assessment should include practical demonstration either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge
- Assessment must relate to the individual's work area or area of responsibility.

Resource Implications

Training and assessment to include access to a real or simulated workplace but 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:

- Case studies
- Observation of practical candidate performance
- Oral and written questions
- Portfolio evidence
- Problem solving
- Role plays
- 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 internal telephone, staff and contact lists; develop product and property knowledge
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	-	
	Solving problems	1	Deal with telephone complaints
	Using technology	2	Operate the telephone system and its integrated elements