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
Element 1: Identify elements and facilities of the host enterprise telephone system **1.1** Identify the *types of outgoing calls* that may be made and their importance to the business *1.2* Identify the *components of the telephone system* **1.3** Describe the *functions and features available in the telephone system* **Element 2: Demonstrate appropriate telephone communication skills** **2.1** Interpret the *enterprise policies and procedures for telephone use* in regard to outgoing calls **2.2** Differentiate between face-to-face and over-the-phone communications *2.3* Use appropriate *telephone communication skills* **2.4** Use appropriate *telephone techniques* **2.5** Describe acceptable *telephone etiquette*	**Unit Variables** 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 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: 1. Front Office *Types of outgoing calls* that may be made may be related to: • 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. *Components of the telephone system* may include: • Landline telephones, including multiple lines and multiple telephone numbers

Element 3: Place outgoing calls on behalf of the enterprise	• Mobile/cell phones
3.1 *Obtain required telephone number* and details of business/person to be called	• Paging systems
	• Switchboards
3.2 Determine *purpose of call*	• Handsets and headsets
3.3 Place call and establish contact with required business/person	• Caller identification (ID) facilities, including VIP caller ID.
3.4 Explain purpose of call	*Functions and features available in the telephone system* may be related to:
3.5 Transfer connected call to caller	• Caller ID display
3.6 Facilitate conference calls	• Call return
3.7 Implement standard re-dial procedures as required	• Transfer and transfer recall
	• Placing calls 'on hold'
3.8 *Log details of call* in accordance with enterprise procedures	• Multiple chat facility
	• Conference call
3.9 Place *emergency calls*	• Integration of facilities
3.10 Enter commonly called numbers into system speed-dial facility	• Speed-dial
	• Automatic re-dial.
Element 4: Place outgoing calls on behalf of guests	*Enterprise policies and procedures for telephone use* may include:
	• Privacy and confidentiality issues
4.1 Greet guest and determine call to be made	• Restrictions on personal use of business telephone, including bans on specific numbers
4.2 Obtain required telephone number and details of business/person to be called	• Costing of telephone calls, including personal (staff) and guests
4.3 Place call and establish contact with required business/person	• Definitions of proper and improper use of equipment and facilities.
	• Standard phrases
4.4 Implement standard re-dial procedures as required	• Authorities to use the system and nominated elements of it

4.5 Log details of call in accordance with enterprise procedures **4.6** *Cost guest calls* for posting to account	• 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