



Communicate on the telephone

D1.HRS.CL1.04

D1.HOT.CL1.07

D2.TCC.CL1.05

Trainee Manual



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William
Angliss
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Specialist centre
for foods, tourism
& hospitality

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Introduction to trainee manual

To the Trainee

Congratulations on joining this course. This Trainee Manual is one part of a 'toolbox' which is a resource provided to trainees, trainers and assessors to help you become competent in various areas of your work.

The 'toolbox' consists of three elements:

- A Trainee Manual for you to read and study at home or in class
- A Trainer Guide with Power Point slides to help your Trainer explain the content of the training material and provide class activities to help with practice
- An Assessment Manual which provides your Assessor with oral and written questions and other assessment tasks to establish whether or not you have achieved competency.

The first thing you may notice is that this training program and the information you find in the Trainee Manual seems different to the textbooks you have used previously. This is because the method of instruction and examination is different. The method used is called Competency based training (CBT) and Competency based assessment (CBA). CBT and CBA is the training and assessment system chosen by ASEAN (Association of South-East Asian Nations) to train people to work in the tourism and hospitality industry throughout all the ASEAN member states.

What is the CBT and CBA system and why has it been adopted by ASEAN?

CBT is a way of training that concentrates on what a worker can do or is required to do at work. The aim of the training is to enable trainees to perform tasks and duties at a standard expected by employers. CBT seeks to develop the skills, knowledge and attitudes (or recognise the ones the trainee already possesses) to achieve the required competency standard. ASEAN has adopted the CBT/CBA training system as it is able to produce the type of worker that industry is looking for and this therefore increases trainees chances of obtaining employment.

CBA involves collecting evidence and making a judgement of the extent to which a worker can perform his/her duties at the required competency standard. Where a trainee can already demonstrate a degree of competency, either due to prior training or work experience, a process of 'Recognition of Prior Learning' (RPL) is available to trainees to recognise this. Please speak to your trainer about RPL if you think this applies to you.

What is a competency standard?

Competency standards are descriptions of the skills and knowledge required to perform a task or activity at the level of a required standard.

242 competency standards for the tourism and hospitality industries throughout the ASEAN region have been developed to cover all the knowledge, skills and attitudes required to work in the following occupational areas:

- Housekeeping
- Food Production
- Food and Beverage Service

- Front Office
- Travel Agencies
- Tour Operations.

All of these competency standards are available for you to look at. In fact you will find a summary of each one at the beginning of each Trainee Manual under the heading 'Unit Descriptor'. The unit descriptor describes the content of the unit you will be studying in the Trainee Manual and provides a table of contents which are divided up into 'Elements' and 'Performance Criteria'. An element is a description of one aspect of what has to be achieved in the workplace. The 'Performance Criteria' below each element details the level of performance that needs to be demonstrated to be declared competent.

There are other components of the competency standard:

- *Unit Title*: statement about what is to be done in the workplace
- *Unit Number*: unique number identifying the particular competency
- *Nominal hours*: number of classroom or practical hours usually needed to complete the competency. We call them 'nominal' hours because they can vary e.g. sometimes it will take an individual less time to complete a unit of competency because he/she has prior knowledge or work experience in that area.

The final heading you will see before you start reading the Trainee Manual is the 'Assessment Matrix'. Competency based assessment requires trainees to be assessed in at least 2 – 3 different ways, one of which must be practical. This section outlines three ways assessment can be carried out and includes work projects, written questions and oral questions. The matrix is designed to show you which performance criteria will be assessed and how they will be assessed. Your trainer and/or assessor may also use other assessment methods including 'Observation Checklist' and 'Third Party Statement'. An observation checklist is a way of recording how you perform at work and a third party statement is a statement by a supervisor or employer about the degree of competence they believe you have achieved. This can be based on observing your workplace performance, inspecting your work or gaining feedback from fellow workers.

Your trainer and/or assessor may use other methods to assess you such as:

- Journals
- Oral presentations
- Role plays
- Log books
- Group projects
- Practical demonstrations.

Remember your trainer is there to help you succeed and become competent. Please feel free to ask him or her for more explanation of what you have just read and of what is expected from you and best wishes for your future studies and future career in tourism and hospitality.

Unit descriptor

Communicate on the telephone

This unit deals with the skills and knowledge required to Communicate on the telephone in a range of settings within the hotel and travel industries workplace context.

Unit Code:

D1.HRS.CL1.04
D1.HOT.CL1.07
D2.TCC.CL1.05

Nominal Hours:

10 hours

Element 1: Respond to incoming telephone calls

Performance Criteria

- 1.1 Answer calls promptly, in an appropriate manner in accordance with enterprise standards
- 1.2 Offer friendly assistance to the caller, and accurately establish the purpose of the call
- 1.3 Repeat call details to the caller to confirm understanding
- 1.4 Answer caller enquiries promptly, or transfer caller to the appropriate location/person
- 1.5 Record caller requests accurately and pass on to the appropriate department/person for follow-up
- 1.6 Relay messages accurately to the nominated person within designated timelines
- 1.7 Report threatening or suspicious phone calls promptly to the appropriate person, in accordance with enterprise procedures
- 1.8 Use language, tone and volume appropriate to phone calls

Element 2: Make telephone calls

Performance Criteria

- 2.1 Obtain correct telephone numbers
- 2.2 Establish clearly the purpose of the call prior to calling
- 2.3 Use telephone equipment correctly in order to establish contact
- 2.4 Communicate clearly your name, company and reason for calling
- 2.5 Be polite and courteous at all times

Assessment matrix

Showing mapping of Performance Criteria against Work Projects, Written Questions and Oral Questions

		Work Projects	Written Questions	Oral Questions
Element 1: Respond to incoming telephone calls				
1.1	Answer calls promptly, in an appropriate manner in accordance with enterprise standards	1.1 & 1.2	1, 2, 3	1
1.2	Offer friendly assistance to the caller, and accurately establish the purpose of the call	1.1	4, 5	2
1.3	Repeat call details to the caller to confirm understanding	1,1	6, 7	3
1.4	Answer caller enquiries promptly, or transfer caller to the appropriate location/person	1.1	8	4
1.5	Record caller requests accurately and pass on to the appropriate department/person for follow-up	1.3	9, 10	5
1.6	Relay messages accurately to the nominated person within designated timelines	1.4	11	6
1.7	Report threatening or suspicious phone calls promptly to the appropriate person, in accordance with enterprise procedures	1.4	12	7
1.8	Use language, tone and volume appropriate to phone calls	1.1	13, 14	8
Element 2: Make telephone calls				
2.1	Obtain correct telephone numbers	2.1	15, 16, 17	9
2.2	Establish clearly the purpose of the call prior to calling	2.1	18	10
2.3	Use telephone equipment correctly in order to establish contact	2.1 & 2.2	19	11
2.4	Communicate clearly your name, company and reason for calling	2.1	20	12
2.5	Be polite and courteous at all times	2.1	21	13

Glossary

Term	Explanation
AM – as in 10:00 AM	'Ante meridiem' – before midday
'Call back' facility	A facility where the system will keep trying a 'busy' telephone number and notify you when it becomes available
Caller ID	Caller identification – a facility enabling identification of the number calling
'Call forward' facility	A facility where a person can redirect calls to their phone to another phone number
Cell phone	Mobile phone
Enterprise standards	The standards, criteria and protocols set by a business regarding the use of its telephone system to ensure the provision of quality service delivery
Extension	A telephone connected to the internal telephone system with its own handset and telephone number
Hands-free phone	A telephone where the handset is not connected to the base station by wires
Internal telephone list	A list of telephone extension numbers within the property identifying the department or staff at each location. Can also include cell phone numbers, pagers and fax machine numbers
Operator's manual	The book of instructions provided by the manufacturer of a telephone system explaining how to use the system or equipment
'Outward Calls' register	A log recording the calls made by the establishment to external numbers
PM – as in 2:00 PM	'Post meridiem' – after midday
Phone	Commonly used short-form of the word 'telephone'
Reservation	A booking (for a room or meal)
Ring limit	The number of times a telephone can ring before staff answer the call

Term	Explanation
Telephone message pad	The formal means used by a business to take and record incoming telephone messages for relaying to staff or guests
Transferring a call	Redirecting a telephone call to another telephone or extension
24-hour clock	International time format where times are shown in hours and minutes from midnight: for example, 13:30 is 13 hours and 30 minutes after midnight (1:30PM)

Element 1: Respond to incoming telephone calls

1.1 Answer calls promptly, in an appropriate manner in accordance with enterprise standards

Introduction

Nearly everyone thinks they can use a telephone competently because they all use one on a regular basis in their everyday, private lives.

But using a telephone in a workplace situation is completely different to using the telephone at home or using your cell phone.

This unit will describe many of the essential requirements that will combine to make your use of the telephone at work effective, productive and profitable.



How important is the telephone to a business?

Put simply, the proper use of a telephone can make or break a business.

That's how important it is.

Customer use of the telephone

Because it is used by customers to contact the business to (amongst other things):

- Make reservations for rooms, tours and travel
- Check, query, modify or cancel arrangements already made
- Make enquiries about functions
- Seek information about prices and products
- Lodge compliments and complaints.

We must be very aware that if a customer receives bad service, or has a bad experience, over the telephone they may not follow through on their enquiry and convert their enquiry into an actual sale.

Staff use of the telephone

The telephone is also used by staff to:

- Communicate with other staff or departments
- Seek clarification about work directions
- Contact nominated people in the event of an emergency situation
- Provide feedback about service and customers to management and co-workers
- Obtain help or stock where unexpected levels of demand or trade occur
- Order stock from suppliers
- Make bookings with providers
- Cold call prospects to generate sales/create bookings
- Place service or maintenance calls with support organisations
- Seek advice from government authorities, industry bodies, and a range of business advisors (such as security, legal, accounting and marketing people).



The contexts of phone calls

Telephone calls may take place in a wide range of different contexts including front-of-house and back-of-house locations such as:

- Administration and booking offices
- Reception/front office
- Restaurants, kitchens, bars and gaming areas
- External areas – where staff use a hands-free telephone or cell phone (such as when in the grounds of a property, or when conducting a tour).

Remember: when you are on the phone, you are the business!

It is important for every person who uses a telephone on behalf of the business to understand that while they are on the phone, they are the business.

The way they use that phone, the way they talk and the information they provide all produce an impression about the business in people's minds and it is important that such an impact reflects the real image of the business.

It is very easy to take the use of the telephone for granted (when receiving a call, making a call or transferring a call) and that is one of the biggest mistakes that workplace telephone users make.

Answering calls promptly

All calls must be answered promptly to avoid keeping the caller waiting and must be answered in an appropriate manner in accordance with enterprise standards.

Failure to answer the phone promptly may mean the caller hangs up and gives their business to another company.

Answering 'promptly' can be seen as answering as soon as possible (subject to enterprise requirements).



Using an appropriate telephone manner

An appropriate telephone manner includes the following:

- Using polite language at all times – regardless of the language being used by the caller (see section 1.8 for more information)
- Using appropriate welcoming or greeting phrases – as set by the employer (see 'Applying enterprise standards' below – this section): the style of the greeting should reflect the style of business involved
- Showing enthusiasm (that is, a positive attitude or approach to the call) when taking a call – to demonstrate the business is eager to talk to the caller and to do business with them
- Being friendly – it is important for all those who take telephone calls to understand the need to be friendly to all callers. This friendliness while on the telephone has been referred to as the need to 'put a smile in your voice' when talking on the telephone. Some people recommend placing a mirror near the telephone or on the desk to remind users to smile while on the phone
- Making an offer of help to the caller. A standard requirement when answering all telephone calls is to either ask the caller a direct question enquiring what assistance the caller wants, or have a positive predisposition towards providing whatever help the caller asks for (see more in section 1.2).

Applying enterprise standards

Your on-the-job training will provide you with the specific enterprise standards that apply when answering the telephone. These requirements may be set out in writing in a Telephone Policy or in an Employee's handbook.

If you are not sure what applies where you work, ask your Supervisor.

Enterprise standards may relate to:

- The use of appropriate greetings or welcoming phrases when answering the telephone. These may require you to:
 - Greet the caller
 - Identify the business
 - Identify yourself
 - Make an offer of assistance

- For example:
 - “Hello, Joe’s Bar and Grill, Mary speaking. How may I help you?”
 - “Good afternoon, Sam’s Tours. This is Alan.”
 - “Good evening, thanks for calling Wayne’s Travel. Wayne speaking.”
- Certainly it is totally unacceptable to pick up the telephone and say:
 - “What?”
 - “Yes”
 - “Hello”
- Adherence to ring limits. Some businesses set a ‘ring limit’ within which they want the telephone to be answered: for example, all incoming calls must be answered within three rings
- When the enterprise sets a ring limit it highlights to staff the need to answer the telephone promptly
- Use of the caller’s name. When you know the name of the person calling it is standard practice to use that name throughout the duration of the call
- It is often said everyone likes to hear the sound of their own name (so using the caller’s name is a positive thing to do), and it demonstrates to the caller you have taken the trouble to remember who they are. Using their name personalises the call
- Making an offer of assistance. When taking a telephone call you must always be alert to the need to (as appropriate):
 - Make an initial offer of help to the caller, such as:
 - “Who would you like to speak to?”
 - “Where can I direct your call?”
 - Be responsive to directing the call in accordance with the initial information provided by the caller:
 - “It sounds as if you need to talk to our Function department, Mr Maguire. I’ll connect you to Mr Thomas, our Banquet Manager”
 - “I think you will need to talk to Peter, he’s in charge of reservations”
 - Take a message if the person the caller needs to speak with is unavailable:
 - “I’m sorry Mr Smith, Mr Grey is unavailable at the moment. Can I take a message and get him to ring you back?”

What if it's not my phone that's ringing?



Should you answer a phone that is ringing even though it's not your phone?

The standard advice is not to. It is best to let it ring and allow the system to handle the call by, for example, re-directing it to another extension or capturing a message on an answering machine facility.

If you do answer someone else's telephone the possible problem is that you may not be able to effectively and satisfactorily deal with the call and this will frustrate or annoy the caller.

Placing the call on hold

If the call has to be put on hold it should be done courteously (again, making sure you follow organisational requirements).

Always ask the caller if they want to hold, for example:

- "Can you hold the line, please?"
- "I'm sorry Mr Hickman, Mr Williams is not in his room at the moment. Would you like to hold while I have him paged?"

Remember though to wait for the caller's response; the caller may not want to hold. Nothing is more annoying for the caller to be asked a question and then have you *not* wait for their answer!

Get back to all calls on hold

It is important to get back to all calls on hold as quickly as possible because no-one likes to be left hanging on the telephone.

Many establishments require you to make contact with a caller who is on hold at least every 30 seconds so they know you are still working on their call (and they haven't been forgotten), and so they know they haven't been accidentally disconnected.



1.2 Offer friendly assistance to the caller, and accurately establish the purpose of the call

Introduction



When a phone caller contacts your business, they cannot see your facial expressions or body language so the only way you can communicate your willingness to help and your friendly attitude is through your voice.

In addition, the area you are answering the call in may be extremely busy and crowded with people which can make taking the call more difficult than normal but the caller cannot see this either.

This means the way you use your voice and what you say is therefore much more important when answering the phone than when talking with a customer in a face-to-face situation where they can see what is happening and read your non-verbal communication.

Offering friendly assistance

At all times, callers must be spoken to in a friendly tone. Remember to 'put a smile in your voice'.

Assistance must be offered when and where necessary without giving the impression that doing so is an imposition.

The key to answering queries is to be genuinely helpful which encompasses:

- Focusing on the call to the exclusion of other work. Do not get distracted
- Trying to understand the caller's problem/s so your response is appropriate to the needs of the caller
- Asking questions to obtain more information to assist in providing relevant help
- Putting yourself in the caller's shoes by seeing things from the caller's perspective
- Taking time with the caller by not rushing the call or giving the impression you are eager to move on to another call or other work
- Checking the caller's level of satisfaction with what is happening, has been provided or is being suggested and then altering your service as necessary to improve service delivery.

Establishing the purpose of the call

The first step after providing an acceptable greeting to the caller is to quickly establish the purpose of the call.

You must never assume that you know why the caller has phoned.

You must always be on your guard to prevent listening to just one or two words the caller says and jumping to a wrong conclusion about the reason for the call. You may think you are being helpful, but it is very annoying to the caller.

For example, a caller says “I’m ringing about a reservation in the Grill Room” should not immediately be transferred to the Grill Room. They may have wanted to go on to say “I had a booking there the other night and there was a mix-up with it. I want to speak to the manager to make a complaint.”

Keys in making sure you correctly establish the purpose of a call before processing it include:

- Asking questions. It is common for people who answer telephone calls to have to ask the caller questions to better determine how or where to process their call
- This is because the caller often fully understands what they want to say or who they want to talk to. However they may fail to convey this and appear to assume you know what they want to talk about and who they need to speak with
- Listening to information given by the caller. This highlights how critical it is for those who take incoming telephone calls to apply ‘active listening’ techniques and focus completely on the words being spoken by the caller
- A useful strategy when establishing the purpose of a call is to jot down notes about what the caller is talking about. This provides a visual reference that jogs the memory and always helps to determine what the caller wants and/or where their call should be transferred.



1.3 Repeat call details to the caller to confirm understanding

Introduction

When taking a call it is essential to make sure you quickly identify and confirm the reason the person is calling.

This helps save time for the caller and makes sure they are connected to the appropriate person or department.



How can I do this?

Be aware

The first requirement is the realisation that there is a need to do this.

When you understand the problems that can flow from not obtaining all necessary information you have set the basis for making sure all calls are handled properly.

Part of this awareness is to appreciate that, while you may know your workplace, its procedures and the staff that work there it is unlikely the caller will have such a clear and close understanding.

Repeat back the details provided to you

To make sure you have heard the caller correctly it is advisable to repeat back to the caller the information they have provided to you.

This verifies you have listened to what they have said and interpreted it correctly.



Ask questions

When taking incoming telephone calls there are several times when it is advisable to ask questions of the caller before further processing their call:

- Where the caller has not supplied sufficient information to allow the call to be processed
- Where the caller appears unsure about who they need to talk to or what they want to find out
- Where the topic identified by the caller has proved, on the basis of past experience, to be one where there are a variety of options in terms of where the call should be directed and who should deal with the call. For example:
 - If the caller states “I want to make a booking” you may need to ask:
 - “Is that for a room or a meal?”
 - “Is that for travel or for a local tour?”
 - If the caller says “I want to speak to the manager” you may need to respond:
 - “Certainly, sir. Would you like to speak with the Food and Beverage manager, the Rooms manager or the Duty manager?”



Advise what you are going to do

When you have identified more accurately where the call should be directed it is standard quality service practice to inform the caller what you are doing with their call. For example:

- “I’ll transfer you to Mr Williams. He is our Duty manager at the moment.”
- “I’ll connect you to International bookings. They will be able to help you.”



Giving this advice helps to keep the caller informed, provides them with extra information and allows them to make an additional statement if they feel this is the wrong action for you to take.

Repeating details when taking a reservation

Most requests for a reservation will be forwarded to the appropriate area or person for them to handle. This allows them to obtain extra information from the caller, arrange the best reservation for the caller and confirm or deny the booking.

Where you are required to take a booking you must:

- Identify the basics for the reservation. These will vary depending on whether the booking is for travel, a room or dining but many of the basics remain the same. You will need to identify:
 - Date. Where a date is mentioned, always confirm by repeating it *and* adding the day of the week. For example, “So that’s a booking for two people for Wednesday August 14th”. This provides a double-check that the caller has identified the date they wanted. Callers sometimes provide an incorrect date and this is only identified when you inform them of the day of the week this applies to
 - Time/s. While many businesses use a 24-hour clock (for example, 7:00PM is expressed as 1900 hours), most callers will not. It is important to clarify any times given to you. If the caller says they want a booking for 7 o’clock, is that AM or PM?
 - Names of people for the reservation
 - Numbers. You need to identify the number of people the booking is for. Some bookings will require identification of adults and children
 - Preferences. The majority of bookings involve customer preferences and you must record and meet these wherever possible. For example callers may request:
 - A room with a view over the city
 - An aisle seat
 - A table near the band
- Record the booking details into the appropriate book or onto the appropriate reservations system as required by enterprise procedures. You will receive on-the-job training in this regard



- When entering these details you must ensure:
 - The correct book, system or field is used. For example, restaurants may have separate Reservation Diaries for lunch and dinner bookings
 - Accuracy of all entries. The details entered into the book or system must reflect what the caller wanted
 - Clarity of all handwritten entries so others can read what you have written.

Providing accurate and comprehensive booking details is vital as this information may be used as the basis for rostering staff, purchasing stock, and a range of internal operational procedures.

- Apply standard customer service techniques which may include:
 - Repeating back reservation details – see below
 - Quoting reference/booking numbers, where necessary or appropriate
 - Thanking the caller for their call or booking. All callers must be thanked, even where they only make an enquiry and do not make a booking
 - Asking if you can be of extra service – “Is there anything else I can do for you today, Mr Cox?”
- Apply standard sales techniques which may include:
 - Providing information on products, services, facilities, deals, policies, terms and conditions
 - Up-selling and on-selling as appropriate to the nature of the caller or sale
 - Selling the benefits as opposed to selling only the features of a product or deal.

Standard phrases to use when repeating call details

Your workplace may have a standard way of confirming caller details, such as:

- “Just to confirm your details, Mr Hutchinson, that’s a table in the Bistro for four people this Saturday night, 26th January, at 8:00PM. We look forward to seeing you then. Is there anything else I can help you with at the moment?”
- “Thank you for booking with Global Travel, Mr Thomas. I have booked you a direct Economy one-way flight with Singapore Airlines, departing Singapore on Tuesday 15th September at 3:20PM and arriving in Melbourne on Wednesday 16th September at 1:00AM. You have seat H1, a window seat. The cost for that flight is X and I will charge that to your company account as requested. Is there anything else I can help you with? Can I arrange accommodation or a hire car for you while you are away?”



The need to focus on the call



A Golden Rule when dealing with a phone call is to focus completely on the caller you are dealing with.

This means the telephone call you are answering must be your primary focus as opposed to being distracted by other calls that may be coming in, calls that are on hold or other people or customers in the area.

(Note: most businesses also require that a face-to-face customer takes priority over a telephone that starts ringing)

After the call has been initially answered it may be necessary to interrupt the call to answer another one. Where a need to do this exists you should:

- Excuse yourself from the caller you are talking to
- Answer the other incoming call and either:
 - Apologise for the delay
 - Ask them if they would mind holding
 - Put them on hold, take their details and offer to call them back, or (not the preferred option) ask if they would mind ringing back
 - Transfer the call to the appropriate person or department
- Go back to the original caller and apologise for the interruption and continue to focus on that call. Note that in some situations you will have to make a value judgment about whether to ignore the other incoming call and simply continue with your existing call
- For example, when handling an already annoyed caller, or when talking with a customer who indicates they are likely to spend a lot of money with the organisation (or a regular customer) it can be best to ignore other calls
- Ask your Supervisor what should apply in your workplace, and adhere to their direction.

It is generally best to answer one call at a time and get every one of them right, rather than answer every incoming call and get half (or even 5%) of them wrong, confused or incomplete.

1.4 Answer caller enquiries promptly, or transfer caller to the appropriate location/person

Introduction

Sometimes you will be able to answer caller enquiries yourself and in other cases there will be a need to transfer the call either because the caller has:

- Requested to speak to another specific person or department
- You are unable to satisfactorily deal with their question.

Answering caller enquiries

A caller can ask any number of questions or make a limitless number of enquiries.

Your employer will expect you to cultivate an appropriate range of product knowledge (that is, knowledge about products and services the organisation provides, prices and special deals, packages and company policies and procedures) but you will **never** be able to answer all enquiries.

To help respond effectively to enquiries:

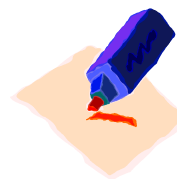
- Identify the exact nature of the enquiries as soon as possible. This will indicate to you whether or not you can deal with the call or whether you need to transfer the call to someone else, or take a message and get back to the caller
- Have resources handy to the telephone that you can refer to help deal with the call. These resources may be company operating manuals, copies of policies and procedures, advertising material, copies of room rates, menus, schedules
- Develop a detailed internal telephone list, identifying all staff in the business and their extension numbers, mobile numbers and pager numbers so you can use this to seek assistance from other staff and/or transfer the call as necessary.



Tips to apply when answering enquiries

The following should be applied when answering enquiries to optimise customer service:

- Remember previous advice. Put a smile in your voice (if appropriate – that is, it is *inappropriate* to put a smile in your voice if the caller is calling to make a complaint)
- Ensure the caller can see you are trying to help them. It is important you become part of the solution to the reason they called, as opposed to becoming an additional problem for them to deal with
- Keep them informed. Tell the caller what you are doing to try to help them. Remember they cannot see you so you have to tell them what you are doing
- Always be honest. Never make up an answer if you don't know, and make sure you tell the caller the full story in response to their question as opposed to just giving them half the story and therefore misleading them or creating unreal expectations
- Refer to documents or other staff where you are unsure. For example, prices change and advertising promotions and campaigns alter over time. Where you are not 100% sure of your facts, look it up or ask the 'right person'
- Realise as quickly as you can when you cannot help the caller anymore. Callers get quickly annoyed at having to explain themselves to you and then having to do the same thing all over again to another person. Never waste the caller's time
- Try harder when you are on the telephone. Make an extra effort when dealing with people on the telephone in recognition of the fact they cannot see you and you cannot see them. Ensure your voice is appropriate and reflects the emotion you want to convey.



Transferring calls

Standard procedures

Your workplace may have standard protocols for you to follow when transferring calls. If they exist you must adhere to them.

Standard procedures for transferring calls include:

- Apologise – if appropriate – for the need to transfer the call. Where the caller has asked for another person there is obviously no need to apologise
- Explain why you need to transfer the call. Highlight the fact the person they are being transferred to will be best able to deal with their call
- Tell them who you want to transfer them to. Give the person's name and title or position within the business
- Ask permission to transfer their call. For example:
 - “Mr Watts, I'm sorry I can't help you with your query but I'd like to transfer you to Mr Brown who is the manager. Would you like to be connected to him? – I'm sure he will be able to give you the information you need.”
- Transfer the call and monitor it. If the call is not answered you must go back to the caller, apologise and make arrangements for the person to phone the caller back.



Dealing with situations where the nominated person is unavailable

Where the person the caller has asked to talk to is unavailable (perhaps you know they are on leave, at lunch, on a Rostered Day Off, or out of the building) you should:

- Apologise and tell them the person is unavailable but do not disclose where they are or why they are away
- Ask if they know of anyone else who might be able to help them. This may involve you politely asking them the reason for their call so you can place it appropriately, or suggest another person who may be able to assist
- Ask if you can take a message and have the person concerned ring them back. Take a short but comprehensive message, repeating back the details to the caller (see section 1.5 for more details)
- Pass the message on to the appropriate person to make sure they receive the message. Always remember taking a message is only part of the job. It is equally important to make sure it is passed on (see section 1.6)
- Monitor the action taken in response to the call. For example, if the person who was required to reply to the call cannot be contacted, or is unable to answer, then you must provide quality service by telephoning the caller and advising them that even though their call has not been answered as intended, it has not been forgotten and will be dealt with shortly (by another person, where appropriate). You must keep trying to contact the caller. In this situation, until you are able to speak with them it is not acceptable to ring once, be unable to talk to them and then ignore the situation.

Can't answer the query?

In some cases you will be the person who the caller needs to speak to, and you may not be able to answer all questions asked of you.

When this occurs an appropriate response is to:

- Apologise – quickly and sincerely. If you do not know the answer to a question then the sooner you identify this and inform the caller, the better
- Ask the caller if you can make some enquiries yourself and get back to them. Remember to 'ask permission' rather than 'tell them' what you are going to do
- Take their details and details of the query. Write down their contact details, ask the best time to call back and capture all the details about the query
- Thank them for their call and confirm you will phone them back at the agreed time on the agreed number
- Find out the required answers. Ask other staff, look up internal documents (price lists, menus, schedules)
- Phone them back and provide promised or requested information as and when arranged or promised
- If you are having difficulty obtaining answers to their questions:
 - Ring them and let them know you have not yet got the answer
 - Apologise
 - Explain the situation. Inform them why you are having difficulty (for example, the person you need to talk to may be away or the system may have crashed)

- Let them know you are still following up. This is to demonstrate you are working on their behalf
- Make a time to phone them back with the required answers and repeat this process where you still cannot find answers.

More on transferring a call



If the call has to be transferred to another department, this must be done promptly and the appropriate person must be located, if possible, before the call is connected.

Never try to connect a call to a person you know is unavailable, or to an extension that will not be answered. This only annoys the caller.

If the required person cannot be located, common practice is to return to the caller (who would be on hold) and ask if a message can be taken and passed on as soon as the person becomes available.

Some businesses have a standard procedure that only allows you to try to transfer a call once. If the person the call is being transferred to is not available the company may require you to take a message rather than attempt another transfer.

Alternatively you may inform the caller the person they want to speak with is busy or on another call and ask them if they would like to continue to hold, if they would like to leave a message or if they would prefer to call back.

Always follow the instructions for your workplace telephone system when transferring calls. Different systems have different ways of transferring calls and the Operator's Manual coupled with on-the-job training is the best way to identify what applies where you work.

Make sure you remember this point!

If you make a promise to get back to a caller at a later time or date then make sure you do!

Sometimes it takes very little for one business to stand out from the competition, and returning or making calls when promised is one way of doing this and one of the easiest things to do.

It demonstrates respect for the caller and shows you value their business.

1.5 Record caller requests accurately and pass on to the appropriate department/person for follow-up

Introduction

Many calls require you to take messages.

This may be because the person the caller wishes to talk to is unavailable or the caller simply wants to quickly provide basic information without having to wait to be connected to a certain person.

The two key elements in taking telephone messages are:

- Recording the message
- Forwarding the message.

Recording the message

If the caller asks to leave a message or it becomes obvious a message needs to be taken, high levels of customer service must be provided. Never give the impression that having to take a message is a nuisance or a burden. It must be done as cheerfully as dealing with all other aspects of telephone operation.



When taking a telephone message:

- Use the designated telephone message form – see below
- Make sure you capture all the information the caller gives you. The message must be meaningful and comprehensive. Remember another person will have to read, interpret and act on it
- Ensure you get the details (times, dates, numbers, prices, addresses and flight numbers) correct. Double-check them. Special attention needs to be paid to spelling of names, addresses and towns. Ask the caller to spell out names and destinations if unsure of the spelling or where variations on traditional spelling exist
- Repeat the message back to the caller to confirm it and allow them to provide extra information or detail (or change the details already provided) and make corrections (adjustments, additions) as required
- Thank the caller for their call, for leaving a message, or for calling back.

Relaying the message

Remember, your job is not finished when you have taken the message. You must follow it up and at least make sure the person for whom the message has been left has received the message.

Standard procedure is to forward the message in hard copy form. That is, it is rarely acceptable to pass on a message verbally.

Activities involved in following-up or relaying a telephone message will depend on the facilities and procedures in place at the business but may involve:

- Checking the person has picked up their message off the staff Message Board
- Checking they have acknowledged your email (via the email 'Read Receipt' facility) where messages are emailed to staff
- Talking to the person face-to-face or over the phone to ask if they have received the message.

In some cases, it may be appropriate for you to also check that the person who the message was meant for has, in fact, taken the necessary action required by the message. This may mean asking if they called the person back, confirmed their booking or provided the necessary information.

Telephone Message Books/Pads

Many businesses have a paper-based message book or a pad of 'telephone message' slips for recording telephone messages.

These may be produced by the business for their individual use but most businesses will use a commercially available option available from stationers.

Either is an excellent way of recording messages.

These books or pads are duplicate in nature. The top copy is given to the person for whom the message is intended and the duplicate or bottom copy stays in the book/pad.

If the top copy is lost, the duplicate copy can always be used as a reference.

When recording a telephone message ensure:

- Legibility – remember that someone else has to read it
- Put your name or initials on it so the recipient knows who took the message, allowing them to contact you for more information
- You record the caller's name, phone number, nature of the call, query or message, and date and time of the call
- What action the recipient is required to take, if any, such as 'ring back', 'forward Function Information Kit': remember these are promises that have been made to the caller so it is vital they are honoured.



Electronic messages

Some businesses record telephone messages on an electronic template on their computer system.

This option serves the same functions as a telephone message book/pad but facilitates fast transmission of the message via email to the intended person.

Naturally, a hard copy can also be printed if required.

Scraps of paper?

Scrap pieces of paper should not be used for recording messages because there is always the chance that the message may be lost. If this happens, there is no back up copy.



1.6 Relay messages accurately to the nominated person within designated timelines

Introduction

This section builds on information in the previous section and emphasises all telephone messages must be passed on.

Speed in doing so is always important.



What is involved?

There is little point in taking a message if it is not passed on.

Options for relaying messages may be covered by a company policy (so check with your Supervisor) but options may include:

- Placing the top copy of the message from the telephone message pad/book/form into the person's pigeon hole. This is not appropriate for an urgent message
- Pinning it to the staff notice board. This is also unacceptable for an urgent message
- Sending the person an email – see previous section re electronic templates for phone messages
- Physically taking the message and giving it to the person (handing it to them – this is appropriate where the matter is urgent)
- Leaving the person a voice message to let them know they have a message and asking them to (as appropriate) contact you, check their email, or pick the message up from their pigeon hole.

It is **never acceptable** just to leave the message in the telephone message book or on the telephone message pad and take no further action on it.

In most instances you will need to monitor the situation and keep calling or checking to see if the person required is available and/or has received the message.

If you are leaving work (that is, going for lunch or going home at the end of your shift) this responsibility should be communicated and passed on to another staff member. Never just leave it and forget about it.

What are appropriate timelines?

The short answer is 'as soon as possible'.

In some cases you may have mentioned to the caller that a person will be unable to call them back until tomorrow, next week or next time they come in to work. If this is the case – and has been agreed to by the caller – then this becomes the 'appropriate timeline' but it is still up to you to make sure it happens.

You must also use your common sense about these timelines.

For example, if a message could not be passed on to someone within a reasonable amount of time (which can be seen as 24 hours, unless there is some urgency associated with the message), then you should notify your Supervisor about the situation. They may decide to handle the message or refer it to someone else.

1.7 Report threatening or suspicious phone calls promptly to the appropriate person, in accordance with enterprise procedures

Introduction

It is a fact of life that the telephone provides a readily available tool for threats or prank calls.

You need to be prepared to take appropriate action on any call that you deem to be threatening or suspicious.

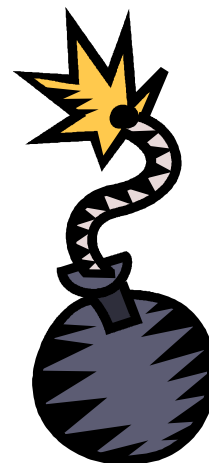
It is never acceptable to ignore any call that could be regarded as either.

Most businesses have standard procedures for staff to take when or if they receive a threatening or suspicious phone call so it is essential you identify and adhere to specific protocols for your individual workplace.

What sort of calls might be involved?

It is possible a business may receive threatening or suspicious phone calls such as:

- Bomb threats
- Hold-up threats
- Threats to staff members
- Threats of retribution
- Threats to damage property
- Nuisance or prank callers.



What action should you take?

Calls falling into any of the above categories must be taken seriously – without exception.

It is **never** up to an individual staff member to make decisions whether or not a threatening phone call is real or not.

All threatening calls must be treated as genuine.

Never assume the caller was a hoax.

Many businesses will have prepared their own internal responses to emergency situations, called an Emergency Action Plan, which are their 'organisational procedures' (which should cover receiving a threatening phone call) and it is important you:

- Become familiar with those procedures now. Do not wait to receive a threatening call before finding out
- Know what questions to ask the caller when they make their threat
- Know where the form is kept to record details of threatening calls
- Alert management or the identified chain of command immediately without alarming customers or causing panic.

It is also useful to try to arrange some practice in relation to taking and responding to a threatening call.

Dealing with a bomb threat

When receiving a bomb threat over the telephone, the call must be handled calmly, ensuring a lot of open questions are asked.

Questions identified by professionals (such as police and anti-terrorist experts) should include:

- "Who are you?"
- "What does the bomb look like?"
- "When is the bomb due to explode?"
- "Why did you plant the bomb?"
- "How can we defuse it?"



Most people making bomb threats do not stay on the telephone for long, so it is important to try to extract as much information as possible as quickly as possible.

After taking the call, you should immediately speak with the appropriate person about the call or threat. This should be done in a quiet place away from others and the details related in a calm and clear manner. This is to avoid panic among customers and other staff members.

Evacuation procedures should be implemented immediately and the appropriate authorities notified (police and fire brigade).

See also:

- <http://www.wikihow.com/Handle-a-Bomb-Threat-over-the-Telephone>
- http://www.dhs.gov/xlibrary/assets/ocso-bomb_threat_samepage-brochure.pdf.

Never assume the caller was a hoax

It is not worth risking lives if your hunch was wrong.

1.8 Use language, tone and volume appropriate to phone calls

Introduction

Standard operating procedures for phone calls will apply in most businesses and will apply to the vast majority of all phone calls received and made.

These will include standard requirements such as:

- Being polite and respectful
- Speaking correctly and distinctly – not mumbling, speaking directly into the phone, eliminating background noises that can hinder communication or cause a barrier to communication
- Not using slang, jargon or other unacceptable language. This includes not using industry terms that the customer may not be familiar with or may not know the true meaning of.

Matching your voice to the call

Normally your voice on the phone should convey warmth, interest, sincerity and a willingness to be of service and assistance to the caller.

It is up to your professional judgment to determine when departures from these protocols are appropriate.

Such situations are extremely rare but may occur as follows:

- There may be instances when you need to raise your voice. For example, the caller may be in a noisy environment, they may have a hearing difficulty, or they may have asked you to 'speak up'
- There may be times when the language you use needs to be considered and adjusted as required. These may be instances such as:
 - Dealing with an industry person who is familiar with trade terminology and with whom you can use industry terms quite safely knowing they will understand what is being said
 - Talking to someone who is a regular patron and is familiar with your business. Therefore you can make reference to various facilities, rooms or services in the business knowing they will understand what you are talking about
 - Talking with a very young or very old person and meeting their expectations in terms of words used
- There may also be times where you believe a change in your tone is called for – perhaps when dealing with someone who is trying to reach a decision and requires lots of information, or someone who is being inappropriately suggestive on the phone.

Rude and aggressive callers

Dealing with a caller who is rude or aggressive does not give you the right to reply in kind and be rude or aggressive in return.

This means in these situations you:

- **Must not** swear back at someone who swore at you
- **Must not** use the same tone of voice as used by the caller when they are obviously annoyed
- **Must not** use the same style of language. Your responses and the language you use must always remain professional and always reflect the company's image
- **Must not** be rude, in return. While at work there is never any justification for being rude to any caller regardless of the circumstances.



Dealing effectively with rude and/or aggressive callers

The keys to dealing with rude and angry people on the telephone are:

- To remain calm and in control. This may be achieved by:
 - Taking a deep breath mentally
 - Recognising the call for what it is. It is an unusual call (that is, accepting most calls are not like this). Do not allow this call to spoil your day or ruin your reputation
 - Seeing the call as a challenge rather than a problem or issue and doing your best to meet the challenge the call presents
- To not respond with anger regardless of how much you may feel like it, feel it is appropriate, or are being provoked. You must respond calmly in order to try to calm the other person down
- To remain polite in your responses using 'Sir', 'Madam', 'please' and 'thank you'. The theory is the more polite you are, the more you encourage a similar response from the caller
- To not take the call personally. Try to remember the caller is not upset with *you personally*; instead they are angry at someone or something else. You just happened to be the one who picked up the phone; so never believe their anger, rudeness, sarcasm, tone of voice is directed at you
- To get to the reason for the call as quickly as possible by re-directing their statements (criticisms, nastiness) back to the real point of the call (that is, what they want to discuss). You need to cut through their initial anger as quickly as possible and start addressing their real problem:
 - "Yes, Sir I can tell you are upset and I apologise. Will you allow me to transfer you to Mr Farah, our manager, so he can talk to you? He has the authority to deal with this kind of issue."

Where a phone call is obviously rude – including calls that are obscene – you should simply hang up straight away and report the call to your Supervisor.

Work Projects

It is a requirement of this Unit that you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

- 1.1 Record yourself answering and responding to five incoming telephone calls ensuring your recordings:
 - Demonstrate the calls were answered promptly, clearly and politely and the purpose of the call was accurately established
 - Adhere to company standards regarding answering the phone
 - Demonstrate you offering friendly assistance or answers to callers
 - Demonstrate you repeating back details of the call to the caller to confirm understanding
 - Demonstrate you transferring calls promptly where required
 - Demonstrate you using appropriate language, tone and volume during the call.
 - 1.2. Submit a copy of the employer's standards, requirements or policies regarding the use of the telephone and/or the requirements for taking incoming calls.
 - 1.3. Provide copies of five telephone messages you have taken ensuring they are comprehensive and accurate. Briefly describe how you made sure each message was received by the person it was intended for.
 - 1.4. Provide a copy of the organisation's procedures to be followed in the event that you were to receive a threatening phone call (such as, for example, a bomb threat). If the organisation does not have such procedures, use these notes and research on the Internet to develop such a procedure and submit that.
-

Summary

Respond to incoming telephone calls

When responding to incoming telephone calls:

- Answer all calls as soon as possible using the business-approved greeting
- Display a friendly and helpful demeanour that demonstrates your willingness to be of service
- Quickly identify the caller's reason for phoning and provide the required assistance promptly or redirect the call so someone else can deal with the call
- Be prepared to clarify caller details, booking details or the reason for the call
- Make sure all telephone messages are recorded accurately and comprehensively and forwarded to the appropriate person
- Follow-up on all telephone messages taken to ensure they have been received and/or actioned
- Treat all suspicious or threatening phone calls seriously and report them immediately to your Supervisor
- Always use language, tone and volume appropriate to the nature of the call to demonstrate respect for the other person and to show their call is valued.

Element 2: Make telephone calls

2.1 Obtain correct telephone numbers

Introduction

Answering a telephone call in a professional and effective manner does not come naturally to most people, and the same applies to making an outgoing call.

Strange as it sounds in the workplace planning and preparation are required before placing a telephone call on behalf of the business.



Why might staff need to make an outgoing call?

Staff may need to make telephone calls to:

- Confirm a reservation with a booking holder
- Place an order with a supplier or lodge a booking with a provider
- Follow up a customer enquiry by phoning the customer back
- Follow up a customer complaint
- Make an enquiry or find information
- Promote a service, facility or product
- Pass on messages.



Obtaining correct telephone numbers

Before making a call there is a critical need to prepare for the call.

Too many people fail to do this because making a phone call is seen as such a simple thing to do. However, there are certain things you should get clear **before** dialling.

First, ensure you have the correct telephone number since calling the wrong number:

- Is embarrassing
- Can lead to bad public relations
- Costs money
- Wastes time.

Speed dialling facilities have helped to eliminate this problem but where speed dialling facilities exist, you need to make sure you:

- Select the correct speed dial number
- Update the number when the other party changes their number.

When dialling an out-of-area or international number, ensure you have the correct codes to allow proper connection. If unsure about the telephone number:

- Look in the telephone book
- Search online directory or relevant website
- Look at a document (such as an invoice, price schedule or promotional literature) from the company you wish to phone
- Search organisation database
- Contact 'Directory Assistance'.

When you find the correct number write it down. Do not rely on memory to dial the number.

Other factors to consider

Make sure you obtain all relevant codes and numbers to allow the call to be effectively made. These may include:

- Country code
- Area code
- Number for the business or person
- Free call number if applicable. Always use the free call number where one exists.



If you do call the wrong number, apologise for any inconvenience caused. Don't just hang up. Many people have 'Caller ID' on their phone and may ring back to see who called them and rudely hang up thereby producing bad public relations for the business.

Time zones

When making a call to another country you should also factor in different time zones that may apply.

Check <http://www.worldtimezone.com/> for information on different time zones.

Additional details

Also check to make sure you have:

- The name of the person you wish to talk to
- Their title and position, if appropriate, for the nature of the call you are going to make
- The name of the department you wish to speak to.

2.2 Establish clearly the purpose of the call prior to calling

Introduction

A common fault people make when making a phone call is to dial the number and *then* try to work out what it is they are going to say.

This often results in:

- Confusion for all parties
- Failure to achieve what was the intended purpose of the call
- Time wasting
- A poor image or reputation for the business
- Loss of business.



Before you dial

In order to optimise the chances of making an effective telephone call, before making the call you need to:

- Establish the purpose of the call – why are you phoning this person or organisation? What is it you want to achieve? Do you want to obtain information or provide it? Exactly what information needs to be captured or given?
- Determine who you need to speak to. If you do not know a person's name you should at least determine which department or area you need to make contact with
- Have all relevant information at your fingertips. Depending on the reason for the call this could include:
 - Previous correspondence with that person or organisation
 - Lists or brochures relating to products or services including price lists, Special deals or offers, product information sheets, menus, flight or tour schedules
 - Details on the important points of the discussion you want to have with the other person such as the details of an offer, the parameters of any negotiation you intend entering into, process details, dates, times, numbers and statistics.

Make sure you only ever negotiate with people within your specified scope of authority and be prepared to pass the call on to a Supervisor or other appropriate person when these limits are reached and/or there is need for the negotiation to go beyond these boundaries.

Preparing and arranging this information can take time so be prepared to do what it takes to get all the details (and get them right). Don't rush this part of using the telephone.

Talking to someone when you are unprepared for the conversation reflects badly on the business, and does not instil confidence in you or the organisation.

An unplanned or unprepared phone conversation has the potential to lose business for the organisation. It is unprofessional and must be avoided.

Additional telephone tips prior to making a call

Additional tips to implement prior to making a telephone call include:

- Make sure you have a pen and paper handy. It should be a standard operating procedure **never** to place a call without these basic tools on hand
- Create a quiet environment. You should try to the best extent possible to make your environment as quiet and distraction-free as possible. This will allow you to focus more on the call and is conducive to better hearing for you and the other person:
 - Close doors and windows
 - Turn off or turn down music systems, radios.

Using 'Outward Calls' registers

Some organisations maintain a Calls Out book or Outward Calls register requiring you to log all calls placed detailing all or some of the following:

- Date and time of the call
- Who placed the call
- Who the call was to or who was spoken to
- Reason for the call.

Ask your Supervisor what applies in your workplace in this regard and ensure you comply with these requirements for every call that needs to be recorded.

Never use the workplace telephone for making private calls

It is never acceptable to use your work phone to receive or make private phone calls.

Using the workplace telephone for these purposes is unacceptable in all workplaces as it costs your employer time and money.



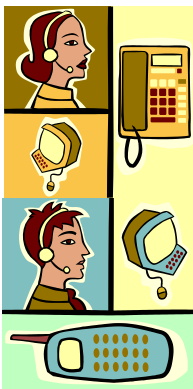
2.3 Use telephone equipment correctly in order to establish contact

Introduction

The telephone at work is likely to be different to what you use at home.

While there are certainly going to be similarities between your home phone and the work phone, the work phone is generally part of a larger system, with more facilities, and commonly requires you to undertake some form of training to become fully competent in its use.

The basics of learning the workplace telephone system



The most important rule to remember about operating your workplace telephone system is:

'All telephone equipment must be used in accordance with the manufacturer's instructions and as per establishment procedures'.

The manufacturer's instructions will explain how to operate the system and establishment procedures will guide the way in which you apply that knowledge.

Where possible, obtain a copy of the operating manual or instructions for your system and make time to read them and practice the basics.

The basics should include:

- Identifying the parts or components of the system – buttons, lights, displays, add-on and integrated components
- Learning how to answer a call – both an internal call and an external call - as well as learning how to identify the difference between these calls
- Learning how to place a call on hold
- Learning how to transfer a call
- Recognising the different tones relating to the system. Most systems produce a different tone to distinguish between internal incoming calls and external incoming calls
- Learning and deciphering the display on the handset or console
- Being able to use the call monitoring features
- Using the speed dial which will involve finding out about the numbers and associated contacts entered into the speed dial facility (this may be a paper-based list or a system-based display on the handset or console)
- Using last number redial
- Using handsets and headsets.

Advanced features

Individual systems vary depending on their size, cost and the needs of the business.

Learning the advanced features may cover things such as:

- Activating 'call forward' for individual numbers. This forwards an incoming call to a designated number if the extension does not answer within a given number of rings
- Activating 'call back' for individual numbers
- Recording voice messages such as greetings
- Setting up conference calls
- Initiating 'Do Not Disturb' for designated numbers
- Initiating password protection on designated lines or numbers
- Establishing call groups
- Adding, deleting and amending system details for nominated internal lines or numbers
- Operating system features that integrate with other systems such as pagers, call costing, wake and reminder calls, barring or limiting calls to and from designated numbers, or messaging
- Using programmable keys or buttons.

How is this training received?

There are limited options in this regard and they are:

- Attending a course conducted by the supplier or manufacturer of the system. This is only an option for those who live in or near a capital city in most cases. In limited cases the supplier may also make an on-site visit to train staff. This usually only applies where a new system has been installed and is not generally available to individual staff as they join an organisation as a new staff member
- Reading the instructions and practicing with the system as you read the manual to assist in becoming familiar with how it operates
- Receiving on-the-job training. This is the most common and features an experienced operator explaining the system to you. It involves you watching and listening to them and then you gradually take over progressively more complex tasks as you learn the system and gain confidence and competency
- Attending in-house training courses. Some establishments will offer training in their training room in relation to what the phone system can do, and how to use it.



Depending on your employer you may find your training will cover telephone equipment such as:

- Single or multiple line telephone systems
- Switchboards
- Cell phones
- Landlines.

2.4 Communicate clearly your name, company and reason for calling

Introduction

When you place an outgoing call this call may be:

- On behalf of a customer
- On behalf of a manager or owner
- For your own business-related purposes such as obtaining a quote, ordering stock or finding information.



When the other party answers your call the first thing to do is clearly:

- State your name
- Identify the business you represent
- Advise them of the reason for your call.

What's involved here?

When you place a call, it is important that you immediately identify yourself and the business you represent.

You should then either request to speak to a particular person, or explain the purpose of the call so you can be transferred to the appropriate department or person.

Remember communication is a two-way process and the person who receives your call can best help you only if you clearly let them know why you rang.

For example, you may use an opening statement such as:

- “Good afternoon, it’s Gary Walsh here from Nursery Ridge Travel. Can I speak with someone who can help me with booking desert tours?”
- “Good morning, my name is Joe Smith from the reception desk at The Walsh on Lime. I’m phoning on behalf of one of our guests, Mr Graham, who is on hold at the moment and wishes to speak to Emma Gregson about a booking he has with you.”
- “Hi, it’s Ryan here from Bob’s Bar and Grill. Can I speak to your accounts department please?”
- “Hello, my name is Linda from Catering and Cakes and I wanted to speak to someone about obtaining information on the products you supply to retail outlets. We’re thinking of changing suppliers and I wanted to get some quotes.”

As advised earlier, you should have a pen and paper ready to note down any names or numbers given to you by the other party.

For example, you may be advised in order to have your call properly dealt with you need to speak with Mary Popov but that she isn’t available at the moment.

The other party may not offer to take your details and get Mary to call you back, but may instead give you Mary’s direct number and tell you that she will be available after 5:00PM if you want to phone back.

Phone tag

Phone tag is where you ring someone and the person you want is unavailable, so you leave a message or your number.

They then return your call and find you are unavailable, so they leave a message.

You then phone them back and the cycle continues!

Some organisations and/or individuals prefer not to get caught up in this 'game of tag' and will neither leave a message nor give a return number. Their preference may be to keep control of the communication by deciding it is best if they retain the decision about when to make the call and speak to the other person.

Talk to your Supervisor and see if your employer has any preferences in this regard.

Note

Most businesses will want you to leave a message where:

- You have promised to call
- You have promised to provide information
- The matter is urgent.



2.5 Be polite and courteous at all times

Introduction

In the same way you are expected to be polite and courteous when taking a telephone call, so too are you expected to be polite and courteous when *making* a call.

The basic requirements

Many of the requirements for being polite and courteous at all times when using the phone have been mentioned in the previous notes.

The points to note when taking or making a call include:

- Always say 'please' when asking for something
- Always say 'thank you' when provided with information or assistance that was required
- Make mention of your appreciation of any special effort the other person has made on your behalf such as locating a certain person, finding required information, making a sensible suggestion that may not have solved your problem but has helped it along the way
- Always remain a professional even when the other party may be rude, unhelpful, or extremely unprofessional themselves
- Never run down a third party to the person you are speaking to. For example, do not mention to the person in Accounts the person on the switchboard was slow, or unhelpful
- Ask when a person who is unavailable is likely to be available or ask them when the best time to call is

- Use the person's name if known or use 'Sir' or 'Madam' according to business protocols when talking to a caller
- Speak at a normal volume. Do not whisper and never shout
- Talk at a normal rate. Do not rush the call
- Use correct language. Do not swear, never use slang expressions, do not joke (many complaints have arisen as a result of a staff member making what they thought was a funny comment but which the other person did not find at all humorous), do not make racist, sexist or ageist comments
- Avoid using industry terms and/or business-specific terminology unless speaking to another industry professional. This can confuse people outside the organisation and make them feel they are being excluded from the conversation
- Eliminate any background noise as far as possible. Turn off radios or music and close doors and windows to reduce noise from other areas
- Talk directly into the phone or headpiece or mouthpiece
- Pronounce your words correctly
- Spell out any words or terms you can realistically expect the other party will be unfamiliar with
- Be careful how you put the phone down when you are talking to the caller. Put it down gently to avoid noise to the other party
- Never talk to a third party while you are on the phone to someone else
- Ask callers if you can help them in any other way before hanging up
- Thank callers for their call, where appropriate
- Let the caller hang up before you do.



Work Projects

It is a requirement of this Unit that you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

2.1 Record yourself making five outgoing telephone calls ensuring your recordings:

- Prove you have obtained the correct telephone number required
- Demonstrate you have established the purpose of the call prior to placing the call
- Demonstrate correct telephone operating skills, as required by the calls
- Demonstrate you speaking clearly, identifying who you are and where you are calling from, and clearly explaining the reason for the calls
- Demonstrate you being polite and courteous.

2.2. Provide a copy or some part of the operating instructions for the telephone system in use at your workplace.

Summary

Make telephone calls

When making telephone calls:

- Always prepare in advance before placing a call
- Obtain the correct telephone number
- Determine what you want to achieve as the outcome of the call
- Identify who you need to speak with
- Plan what you are going to say
- Use the workplace telephone system in accordance with the manufacturer's instructions and workplace protocols
- Identify yourself, the name of the organisation you represent and the reason for your call when making contact with the other party
- Do not use the workplace telephone for private calls
- Maintain a polite and courteous manner at all times.

Presentation of written work

1. Introduction

It is important for students to present carefully prepared written work. Written presentation in industry must be professional in appearance and accurate in content. If students develop good writing skills whilst studying, they are able to easily transfer those skills to the workplace.

2. Style



Students should write in a style that is simple and concise. Short sentences and paragraphs are easier to read and understand. It helps to write a plan and at least one draft of the written work so that the final product will be well organized. The points presented will then follow a logical sequence and be relevant. Students should frequently refer to the question asked, to keep 'on track'. Teachers recognize and are critical of work that does not answer the question, or is 'padded' with irrelevant material. In summary, remember to:

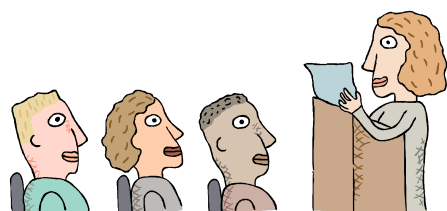
- Plan ahead
- Be clear and concise
- Answer the question
- Proofread the final draft.

3. Presenting Written Work

Types of written work

Students may be asked to write:

- Short and long reports
- Essays
- Records of interviews
- Questionnaires
- Business letters
- Resumes.



Format

All written work should be presented on A4 paper, single-sided with a left-hand margin. If work is word-processed, one-and-a-half or double spacing should be used. Handwritten work must be legible and should also be well spaced to allow for ease of reading. New paragraphs should not be indented but should be separated by a space. Pages must be numbered. If headings are also to be numbered, students should use a logical and sequential system of numbering.

Cover Sheet

All written work should be submitted with a cover sheet stapled to the front that contains:

- The student's name and student number
- The name of the class/unit
- The due date of the work
- The title of the work
- The teacher's name
- A signed declaration that the work does not involve plagiarism.

Keeping a Copy

Students must keep a copy of the written work in case it is lost. This rarely happens but it can be disastrous if a copy has not been kept.

Inclusive language

This means language that includes every section of the population. For instance, if a student were to write 'A nurse is responsible for the patients in her care at all times' it would be implying that all nurses are female and would be excluding male nurses.

Examples of appropriate language are shown on the right:

Mankind	<i>Humankind</i>
Barman/maid	<i>Bar attendant</i>
Host/hostess	<i>Host</i>
Waiter/waitress	<i>Waiter or waiting staff</i>

Recommended reading

User manuals and Instruction booklets for the telephone systems being used in the training institution

Facchinetti, A., 2003, *Responding to the call*, Tertiary press, Croydon, Victoria, Australia.

Finn, C., 2007, *Manners on the telephone*, Picture Window Books, Minneapolis, Minn.

Hajnci, L., 2002, [kit], *What's my line?: telephone tasks and activities for ESL*, Adult Migrant Education Services, Melbourne.

Hickman, A., 2008, *Communicate on the telephone: SITXCOM004A*, William Angliss Institute, Melbourne, Australia.

Hughes, J., 2006, *Telephone English*, Macmillan, Oxford. (includes phrase bank, audio CD and role plays)

Jurek, L., 2008, *Terrific telephone techniques*, 3rd edn., Terrific Trading, West Leederville, W.A.

Lowe, S., 2004, [kit], *Telephoning*, Delta, Addlestone, Surrey.

Marks, G., 2008, *Big hearted telephone customer service: 6 practical steps for great telephone customer service*, Sound Training Solutions Pty. Ltd., Greystanes, N.S.W.

Maxwell, D., 2006, *Phone skills for the Information age*, McGraw-Hill/Irwin, New York.

DVD

'Dealing with Conflict Situation; Communicate on the Telephone, Multi-Media Department, William Angliss Institute, Melbourne, Australia.

Trainee evaluation sheet

Communicate on the telephone

The following statements are about the competency you have just completed.

Please tick the appropriate box	Agree	Don't Know	Do Not Agree	Does Not Apply
There was too much in this competency to cover without rushing.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Most of the competency seemed relevant to me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The competency was at the right level for me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I got enough help from my trainer.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The amount of activities was sufficient.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The competency allowed me to use my own initiative.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My training was well-organized.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My trainer had time to answer my questions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I understood how I was going to be assessed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I was given enough time to practice.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My trainer feedback was useful.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enough equipment was available and it worked well.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The activities were too hard for me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The best things about this unit were:

The worst things about this unit were:

The things you should change in this unit are:



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