

# Unit 219 Use a telephone system

## Unit summary

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Use a telephone system to make, receive and transfer internal and external calls; and to check and deal with recorded messages.

## Skills

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You will apply the following skills:

- Questioning
- Listening
- Researching
- Communicating
- Presenting yourself
- Summarising
- Using technology
- Problem solving

## Performance indicators

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You will:

### **Making calls**

1. Identify the purpose of the call
2. Obtain the name and numbers of the person to be contacted
3. Make contact with the person
4. Communicate information to achieve the purpose of the call
5. Project a positive image of yourself and your organisation
6. Summarise the outcomes of the conversation before ending the call

### **Receiving calls**

7. Answer the phone according to your organisation's procedures
8. Project a positive image of yourself and your organisation
9. Identify the caller, where they are calling from and what they need
10. Provide accurate and up-to-date information whilst protecting confidentiality and security
11. Transfer calls where requested
12. Take and relay messages according to the caller's needs
13. Summarise the outcomes of the conversation before ending the call

## Dealing with message systems

14. Keep your message system up-to-date
15. Check the system for callers' messages
16. Respond to callers' messages within agreed timescales
17. Delete messages when you have dealt with them
18. Leave recorded messages on other people's systems that achieve their purpose

## Knowledge

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You will know:

1. The different features of telephone systems and how to use them
2. Why it is important to identify the purpose of a call before you make it
3. The different methods you can use to obtain the names and numbers of people that you have to make contact with
4. How to use telephone systems to make contact with people inside and outside your organisation
5. Why it is important to project a positive image of yourself and your organisation
6. Why it is important to summarise the outcomes of a telephone conversation before ending the call
7. How to follow your organisation's procedures when making and receiving calls
8. How to identify the caller and their needs
9. Why it is important to give accurate and up-to-date information to callers
10. Why confidentiality and security are important when dealing with callers
11. The types of information that could affect confidentiality and security and how to handle these
12. How to identify the appropriate person to whom you should transfer a call
13. The information you should give when transferring calls, taking or leaving messages
14. The different types of message systems and their main features
15. Why it is important to keep your message system up-to-date

## Evidence requirements

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This section is aimed at the assessor and sets out the evidence requirements for this unit.

1. Evidence for this unit is generated when your candidate is carrying out real work, in a private sector organisation, not-for-profit organisation or public service organisation whether full-time or part-time, paid or voluntary.
2. For this unit, evidence may be collected in an approved Realistic Working Environment or an extended work placement.
3. Simulation is not allowed for this unit.

4. Evidence must show that your candidate has consistently met the standard over a sufficient period of time for you to consider the candidate competent.
5. You may use the following assessment methods when assessing this unit:

Performance evidence	Observation	Yes
	Examination of work products	Yes
Supplementary evidence	Witness testimony	Yes
	Questions *	Yes

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

6. Your candidate needs to show that they:

**Make calls.** Evidence may include:

- Scripts
- Notes
- Recordings
- Minutes of 1-1 meeting
- Team meeting minutes

**Receive calls.** Evidence may include:

- Notes
- Recordings
- Minutes of 1-1 meeting
- Team meeting minutes

**Deal with message systems.** Evidence may include:

- Copy messages to colleagues
- Message pad
- Recordings
- Message book
- Minutes of 1-1 meeting
- Team meeting minutes

7. Contingencies

Performance Indicator 11	Whether the transfer is from one extension to another or by handing the phone to a colleague the candidate must demonstrate that they pass the information gathered from the caller to the recipient
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8. Evidence generated for this unit may contribute towards Unit 201:

- Communicate information
- Plan and be accountable for your work
- Improve your own performance
- Behave in a way that supports effective working

and Unit 202

- Work to achieve your organisation's purpose and values
- Support sustainability
- Support diversity
- Maintain security and confidentiality