Communicate on the telephone

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

Assessor Manual

Australian Aid
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William Angliss Institute
Specialist centre for foods, tourism & hospitality

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Assessor Manual

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The Association of Southeast Asian Nations (ASEAN) was established on 8 August 1967. The Member States of the Association are Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand and Viet Nam.

The ASEAN Secretariat is based in Jakarta, Indonesia.

General Information on ASEAN appears online at the ASEAN Website: www.asean.org.

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Competency Based Assessment (CBA) – An introduction for assessors

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

Suggested assessment methods

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

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

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

Alternative assessment methods

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

a) The nature of the unit

b) The strengths of participants

c) The number of participants in the class

d) Time required to complete assessments

e) Time dedicated to assessment

f) Equipment and resources required.

Alternate assessment methods include:

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

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

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

Selection of assessment methods

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

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

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

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

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

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

Assessing competency

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

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

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

Pass Competent (PC)

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

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

Not Yet Competent' (NYC)

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

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

The participant may be required to:

a) Undertake further training or instruction

b) Undertake the assessment task again until they are deemed to be 'Pass Competent'.

Regional Qualifications Framework and Skills Recognition System

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

The purpose of this framework is to provide:

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

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

Recognition of Prior Learning (RPL)

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

This process is a learning and assessment pathway which encompasses:

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

Code of practice for assessors

This Code of Practice provides:

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

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

- The differing needs and requirements of the person being assessed, the local enterprise and/or industry are identified and handled with sensitivity
- Potential forms of conflict of interest in the assessment process and/or outcomes are identified and appropriate referrals are made, if necessary

- All forms of harassment are avoided throughout the planning, conducting, reviewing and reporting of the assessment outcomes
- The rights of the candidate are protected during and after the assessment
- Personal and interpersonal factors that are not relevant to the assessment of competency must not influence the assessment outcomes
- The candidate is made aware of rights and process of appeal
- Evidence that is gathered during the assessment is verified for validity, reliability, authenticity, sufficiency and currency
- Assessment decisions are based on available evidence that can be produced and verified by another assessor
- Assessments are conducted within the boundaries of the assessment system policies and procedures
- Formal agreement is obtained from both the candidate and the assessor that the assessment was carried out in accordance with agreed procedures
- The candidate is informed of all assessment reporting processes prior to the assessment
- The candidate is informed of all known potential consequences of decisions arising from an assessment, prior to the assessment
- Confidentiality is maintained regarding assessment results
- The assessment results are used consistently with the purposes explained to the candidate
- Opportunities are created for technical assistance in planning, conducting and reviewing assessment procedures and outcomes.

Instructions and checklist for assessors

Instructions

General instructions for the assessment:

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

Preparation

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

Briefing checklist

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

Checklist for Assessors

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

	Tick (✓)	Remarks
After the assessment I have:		
Ensured candidate is given constructive feedback.		
Completed and signed the assessment record.		
Thanked candidate for participating in the assessment.		

Instructions for recording competency

Specifications for recording competency

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

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

Instructions for different assessment methods

Specifications for work project assessment

These guidelines concern the use of work projects.

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

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

Assessors should follow these guidelines:

- Review the Work Projects at the end of each 'Element of Competency' in the Trainee Manual to ensure you understand the content and what is expected

- Prepare sufficient resources for the completion of work activities including:
  - Time – whether in scheduled delivery hours or suggested time participants to spend outside of class hours
  - Resources – this may involve technical equipment, computer, internet access, stationery and other supplementary materials and documents
- Prepare assessment location (if done in class) making it conducive to assessment
- Explain Work Projects assessment to candidate, at the start of each Element of Competency. This ensures that participants are aware of what is expected and can collate information as delivery takes place
- Assessors can use the following phrase as a guide (where an 'X' is identified, please input appropriate information):

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

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

Specifications for Oral Question Assessment

These guidelines concern the use of oral questioning.

Assessors should follow these guidelines.

- Prepare Assessment Record for Oral Questioning. One record for each candidate:
  - Enter Student name

    - Enter Assessor name
    - Enter Location
- Familiarise self with Questions to be asked
- Prepare assessment location (table and chairs) making it conducive to assessment
- Explain Oral Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

  "These oral questions are part of the formal assessment for the unit of competency titled X.

  There are X questions and you are required to answer all of them to the best of your ability and I will record whether or not you have answered correctly.

  We have 60 minutes for this assessment.

    - I will give you feedback at the end of the assessment
    - Do you have any questions about this assessment?"
- Commence Oral Questioning assessment:
    - Complete Assessment Record for the Oral Questioning by:

      a) Ticking PC or NYC, as appropriate

      b) Entering 'Remarks' as required

      c) Completing Oral Questioning within 60 minutes
- Complete Oral Questioning and provide feedback to candidate
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Written Question Assessment

These guidelines concern the use of written questioning.

Assessors should follow these guidelines:

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

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

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

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

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

We have X time for this assessment:

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

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

Specifications for Observation Checklist

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

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

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

To complete the Observation Checklist the Assessor must:

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

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

Specifications for Third Party Statement

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

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

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

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

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

To complete the Third Party Verification Statement the Assessor must:

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

The Third Party must:

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

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

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

Competency Standard

UNIT TITLE: COMMUNICATE ON THE TELEPHONE	**NOMINAL HOURS:** 10
UNIT NUMBER: D1.HRS.CL1.04 D1.HOT.CL1.07 D2.TCC.CL1.05	
UNIT DESCRIPTOR: 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	
ELEMENTS AND PERFORMANCE CRITERIA	**UNIT VARIABLE AND ASSESSMENT GUIDE**
Element 1: Respond to incoming telephone calls **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	**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 communicating on the telephone within the labour divisions of the hotel and travel industries and may include: 1. Front Office 2. Housekeeping 3. Food and Beverage Service 4. Food Production 5. Travel Agencies 6. Tour Operation.

Element 2: Make telephone calls **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	*Appropriate manner* may relate to: • Polite language • Appropriate welcoming phrase • Enthusiasm • Friendliness • Willingness to help. *Enterprise standards* may include: • Appropriate greeting/s • Number of rings call should be answered within • Personal identification • Use of caller's name Offer of assistance if person within organization is unavailable to take the caller's call. *Establish the purpose of the call* may include: • Asking questions • Listening to information given. *Threatening or suspicious phone calls* may include: • Bomb threats • Talking about violent acts. Language, *tone and volume* relates to: • Pleasant • Friendly • Easy to understand.

	Telephone equipment usage may relate to: • Activation system, e.g.: ringing, buzzing, light flashing • Use of speaker button, hand piece or hands-free headset • Placing calls on hold • Transferring calls • Using intercom system to page • Single or multiple lines. **Assessment Guide** The following skills and knowledge must be assessed as part of this unit: • Enterprise policies and procedures in regard to telephone communication • Principles of effective communication in relation to listening, questioning and non-verbal communication • Of the technical features of a specific telephone system • Interpersonal skills to relate to people from a range of social, cultural and ethnic backgrounds • Writing skills for taking basic messages. **Linkages To Other Units** • Work with colleagues and customers • Perform clerical procedures • Communicate in English on the telephone.

	Critical Aspects of Assessment Evidence of the following is essential: • Demonstrate correct use of telephone equipment • Demonstrated ability to provide courteous and friendly telephone service • Demonstrated ability to be clear and concise both verbally and in writing • Demonstrated ability to receive and relay messages accurately • Demonstrated ability to make telephone calls for different purposes. **Context of Assessment** This unit may be assessed on or off the job: • Assessment should include practical demonstration of the ability to communicate on the telephone either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge • Assessment must relate to the individual's work area, job role and area of responsibility • Assessment must include project or work activities that allow the candidate to communicate on the telephone • Assessment must include demonstration of communicating on the telephone and operating telephone equipment under normal workplace conditions. **Resource Implications** Training and assessment to include access to a real or simulated workplace, including access to telephone equipment and in particular those procedures, policies and guidelines that guide effective work practices in relation to communicating on the telephone; and access to workplace standards, procedures, policies, guidelines, tools and equipment.

	Assessment Methods The following methods may be used to assess competency for this unit: • Case studies • Observation of practical candidate performance • Oral and written questions • Portfolio evidence • Problem solving • Role plays • Third party reports completed by a supervisor • Project and assignment work. **Key Competencies in this Unit** *Level 1 = competence to undertake tasks effectively* *Level 2 = competence to manage tasks* *Level 3 = competence to use concepts for evaluating*

Key Competencies	Level	Examples
Collecting, organising and analysing information	1	Collect information from phone calls about name, message and required action; compile a list of key contact numbers
Communicating ideas and information	1	Speak clearly, concisely and courteously to customers and colleagues; record and relay messages

	Planning and organizing activities		Prioritize phone calls and tasks; prepare for complex or difficult phone calls prior to making the call
	Working with others and in teams	1	Transfer calls to the appropriate person; offer assistance to callers when the person they called is unavailable; take clear concise messages that can be easily understood by colleagues
	Using mathematical ideas and techniques	0	
	Solving problems	1	Deal with difficult customers or abusive phone calls
	Using technology	1	Use telephone equipment

Oral Questions

Student name	
Assessor name	
Location/venue	
Unit of competency	Communicate on the telephone D1.HRS.CL1.04 D1.HOT.CL1.07 D2.TCC.CL1.05
Instructions	1. Ask student questions from the attached list to confirm knowledge, as necessary 2. Place tick in boxes to reflect student achievement (Pass Competent 'PC' or Not Yet Competent 'NYC') 3. Write short-form student answer in the space provided for each question.

Questions	**Response**	
	PC	**NYC**
1. Give me an example of how you would answer the phone in the morning to an incoming call from an outside number.	❑	❑

Questions	Response	
	PC	NYC
2. Give me an example of how you have handled an incoming call where the caller was unsure of what they wanted, or who they needed to speak to within your business.	❑	❑
3. Give me some examples of call details you might repeat back to a caller in order to confirm understanding about their call.	❑	❑
4. Tell me how you use your workplace telephone system to transfer a call to another phone or extension.	❑	❑

Questions	Response	
	PC	NYC
5. What method do you use at work to record details of a message needing to be passed on to someone else?	❑	❑
6. What system is used in your workplace to make sure telephone messages are passed on to the necessary person as soon as possible?	❑	❑
7. Tell me what action you would take if you took a phone call and the caller told you there was a bomb in the building.	❑	❑

Questions	Response	
	PC	NYC
8. Why is it important to use the appropriate language, tone and volume for each individual telephone call?	❑	❑
9. Tell me how you would go about finding the necessary international telephone dialling codes for making a call to, say, Melbourne, Australia.	❑	❑
10. Why is it important to determine the purpose of a call before you make the call?	❑	❑

Questions	Response	
	PC	NYC
11. How can you most efficiently use your telephone system to help you dial frequently called numbers?	❑	❑
12. You have just placed a call to a supplier to order some stock (or to another business to make an enquiry). Give me an example of what you would say when the other party answers your call.	❑	❑
13. Why is it important for you to remain polite and courteous at all times when making an outgoing telephone call from your workplace?	❑	❑

Written Questions

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Student Name: ____

Answer all the following questions and submit to your Trainer.

1. In relation to the use of the telephone, what is a 'ring limit'?

   ____
   ____
   ____
   ____

2. Answer 'True' or 'False' to the following statement: *Standard industry advice is to answer any phone that is ringing even if it is not your phone.*

   True ❑ False ❑

3. Answer 'Yes' or 'No' to the following statement: *Should callers be asked if they want to 'hold' before being placed on hold?*

   Yes ❑ No ❑

4. What is the first step to take with an incoming call after providing an acceptable greeting to the caller?

   ____
   ____
   ____
   ____

5. What are the two keys in making sure you correctly establish the purpose of a call before processing it?

6. Answer 'Yes' or 'No' to the following statement: Should details of a phone call where you took a reservation be repeated back to the caller?

   Yes ❑ No ❑

7. What is the Golden Rule when dealing with a phone call?

8. List three tips that should be applied when answering telephone enquiries to optimise customer service.

9. What are the two key elements in taking telephone messages?

10. Give two reasons why details of a telephone message should be repeated back to the caller who leaves the message.

11. After taking a telephone message, what must you ensure happens to it?

12. List three examples of incoming telephone calls that could be regarded as threatening or suspicious.

13. Answer ‘True’ or ‘False’ to the following statement: The only time it is acceptable to be rude and/or aggressive to a caller is when they are being rude and/or aggressive to you.

True ❑ False ❑

14. List three keys to deal with rude and angry people on the telephone.

15. What is the critical need that must be addressed before making an outgoing telephone call?

16. Identify three ways you could obtain an out-of-area or international number or code prior to placing a call.

17. What important factor (apart from obtaining the correct code, number and details of the person to be spoken to) should be taken into account when making an international telephone call?

18. List three actions you should take to optimise the chance of making an effective outgoing telephone call.

19. What is the most important rule to remember about operating your workplace telephone system?

20. Answer 'Yes' or 'No' to the following statement: *Is it standard practice to identify yourself and the business you represent when making an outgoing telephone call to another person or party?*

Yes ❑ No ❑

21. List three points to note when taking or making a telephone call in order to demonstrate politeness and courtesy.

Answers to Written Questions

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

1. **In relation to the use of the telephone, what is a 'ring limit'?**

   The number of times a telephone is allowed to ring according to workplace requirements before it must be answered.

2. **Answer 'True' or 'False' to the following statement: *Standard industry advice is to answer any phone that is ringing even if it is not your phone.***

   False.

3. **Answer 'Yes' or 'No' to the following statement: *Should callers be asked if they want to 'hold' before being placed on hold?***

   Yes.

4. **What is the first step to take with an incoming call after providing an acceptable greeting to the caller?**

   To quickly establish the purpose of the call.

5. **What are the two keys in making sure you correctly establish the purpose of a call before processing it?**

   (A) Asking questions

   (B) Listening to information given by caller.

6. **Answer 'Yes' or 'No' to the following statement: *Should details of a phone call where you took a reservation be repeated back to the caller?***

   Yes.

7. **What is the Golden Rule when dealing with a phone call?**

   To focus completely on the caller you are dealing with 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.

8. List three tips that should be applied when answering telephone enquiries to optimise customer service.

Any from the following:

- Put a smile in the voice (if appropriate)
- Ensure the caller can see you are trying to help them
- Keep them informed about what you are doing to try to help them
- Always be honest
- Refer to documents, other staff where you are unsure
- Realise quickly when unable to help the caller any more
- Try harder when on the telephone.

9. What are the two key elements in taking telephone messages?

(A) Recording the message

(B) Forwarding the message.

10. Give two reasons why details of a telephone message should be repeated back to the caller who leaves the message.

(A) To confirm the message

(B) To allow the other person to add or change information.

11. After taking a telephone message, what must you ensure happens to it?

It is passed on to the appropriate person.

12. List three examples of incoming telephone calls that could be regarded as threatening or suspicious.

Any from the following:

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

13. Answer 'True' or 'False' to the following statement: *The only time it is acceptable to be rude and/or aggressive to a caller is when they are being rude and/or aggressive to you.*

False.

14. List three keys for dealing with rude and angry people on the telephone.

Any from the following:

- To remain calm and in control
- To not respond with anger regardless of how much you may feel like it, feel it is appropriate, or are being provoked
- To remain polite in your responses
- To not take the call personally
- To get to the reason for the call as quickly as possible by redirecting their call back to what they want to discuss.

15. What is the critical need that must be addressed before making an outgoing telephone call?

To prepare for the call.

16. Identify three ways you could obtain an out-of-area or international number or code prior to placing a call.

Any from the following:

- Telephone book
- Search online directory
- Read the number from one of their documents
- Search workplace database
- Contact or ring Directory assistance.

17. What important factor (apart from obtaining the correct code, number and details of the person to be spoken to) should be taken into account when making an international telephone call?

Time zones.

18. List three actions you should take to optimise the chance of making an effective outgoing telephone call:

Any from the following:

- Establish the purpose of the call
- Determine who you need to speak to
- Have all relevant information at your fingertips
- Make sure you have a pen and paper handy
- Create a quiet environment.

19. What is the most important rule to remember about operating your workplace telephone system?

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

20. Answer 'Yes' or 'No' to the following statement: *Is it standard practice to identify yourself and the business you represent when making an outgoing telephone call to another person/party?*

Yes.

21. List three points to note when taking or making a telephone call in order to demonstrate politeness and courtesy

Any from the following:

- Always say 'please' when asking for something
- Always say 'thank you' when provided with information or assistance
- Make mention of appreciation for special effort made by the other person
- Always remain a professional
- Never run down a third party to the person you are speaking to
- Ask when a person who is unavailable is likely to be available
- Use the person's name if known
- Speak at a normal volume
- Talk at a normal rate
- Use correct language
- Avoid using industry terms and/or business-specific terminology
- Eliminate any background noise as far as possible
- Talk directly into the phone or headpiece/mouthpiece
- Pronounce your words correctly
- Spell out difficult words/terms
- Be careful how you put the phone down when you are talking to the caller
- 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.

Observation Checklist

Student name	
Assessor name	
Location/venue	
Unit of competency	Communicate on the telephone D1.HRS.CL1.04 D1.HOT.CL1.07 D2.TCC.CL1.05
Dates of observation	
Instructions	1. Over a period of time observe the student completing each of the following tasks: a) Respond to incoming telephone calls b) Make telephone calls 2. Enter the date on which the tasks were undertaken 3. Place a tick in the box to show they completed each aspect of the task to the standard expected in the enterprise 4. Complete the feedback sections of the form, if required.

Did the candidate	**Yes**	**No**
Element 1: Respond to incoming telephone calls		
Answer calls promptly, in an appropriate manner in accordance with enterprise standards	❑	❑
Offer friendly assistance to the caller, and accurately establish the purpose of the call	❑	❑
Repeat call details to the caller to confirm understanding	❑	❑
Answer caller enquiries promptly, or transfer caller to the appropriate location/person	❑	❑
Record caller requests accurately and pass on to the appropriate department/person for follow-up	❑	❑
Relay messages accurately to the nominated person within designated timelines	❑	❑
Report threatening or suspicious phone calls promptly to the appropriate person, in accordance with enterprise procedures	❑	❑
Use language, tone and volume appropriate to phone calls	❑	❑

Did the candidate	Yes	No
Element 2: Make telephone calls		
Obtain correct telephone numbers	❑	❑
Establish clearly the purpose of the call prior to calling	❑	❑
Use telephone equipment correctly in order to establish contact	❑	❑
Communicate clearly your name, company and reason for calling	❑	❑
Be polite and courteous at all times	❑	❑
Did the student's overall performance meet the standard?	❑	❑

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

Third Party Statement

Student name:			
Name of third party:		**Contact no**	
Relationship to student:	❑ Employer ❑ Supervisor ❑ Colleague ❑ Other *Please specify:*____ *Please do not complete the form if you are a relative, close friend or have a conflict of interest]*		
Unit of competency:	Communicate on the telephone D1.HRS.CL1.04 D1.HOT.CL1.07 D2.TCC.CL1.05		

The student is being assessed against industry competency standards and we are seeking your support in the judgement of their competence.

Please answer these questions as a record of their performance while working with you. Thank you for your time.

Do you believe the trainee has demonstrated the following skills? *(tick the correct response]*	**Yes**	**No**	**Not sure**
Answers calls promptly and in accordance with enterprise standards	❑	❑	❑
Offers assistance to callers	❑	❑	❑
Identifies purpose of calls	❑	❑	❑
Repeats call details to callers to confirm understanding	❑	❑	❑
Records callers' requests where necessary	❑	❑	❑
Relays telephone messages appropriately	❑	❑	❑
Reports threatening or suspicious calls	❑	❑	❑
Uses appropriate language, time and volume on the telephone	❑	❑	❑
Obtains telephone numbers before making calls	❑	❑	❑
Establishes purpose of call before making outgoing calls	❑	❑	❑
Uses telephone equipment correctly	❑	❑	❑
Communicates clearly when using the telephone	❑	❑	❑
Applies appropriate interpersonal skills on the telephone	❑	❑	❑

Comments/feedback from Third Party to Trainer/Assessor:	
Third party signature:	**Date:**
Send to:	

Competency Recording Sheet

Name of Student		
Name of Assessor/s		
Unit of Competency	Communicate on the telephone	D1.HRS.CL1.04 D1.HOT.CL1.07 D2.TCC.CL1.05
Date assessment commenced		
Date assessment finalised		
Assessment decision	Pass Competent / Not Yet Competent (Circle one)	
Follow up action required (Insert additional work and assessment required to achieve competency)		
Comments/observations by assessor/s		

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

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 1: Respond to incoming telephone calls						
Answer calls promptly in an appropriate manner in accordance with enterprise standards						
Offer friendly assistance to the caller, and accurately establish the purpose of the call						
Repeat call details to the caller to confirm understanding						
Answer caller enquiries promptly, or transfer caller to appropriate extension						
Record caller requests accurately and pass on to the appropriate department/person for follow-up						
Relay messages accurately to the nominated person within designated timelines						
Report threatening or suspicious phone calls promptly to the appropriate person, in accordance with enterprise procedures						
Use language, tone and volume appropriate to phone calls						

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

Element & Performance Criteria	**Observation of skills**	**3rd Party Statement**	**Oral Questions**	**Written Questions**	**Work Projects**	**Other**
Element 2: Make telephone calls						
Obtain correct telephone numbers						
Establish clearly the purpose of the call prior to calling						
Use telephone equipment correctly in order to establish contact						
Communicate clearly your name, company and reason for calling						
Be polite and courteous at all times						
Candidate signature			**Date**			
Assessor signature			**Date**			

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