

Title	Answer customer enquiries on the telephone in a wide range of contexts		
Level	3	Credits	3

Purpose	<p>This unit standard is for people who work, or plan to work, in the sales or customer service environment.</p> <p>People credited with this unit standard are able to: establish customer requirements over the telephone; meet customer requirements and close call; and complete documentation and follow-up procedures.</p>
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Classification	Service Sector Skills > Service Delivery
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Available grade	Achieved
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Guidance Information

- 1 This unit standard can be assessed against in a real or simulated workplace.
- 2 Definitions

Analysis refers to the process of defining the best way to meet customers' requirements.

Bring-ups refer to notifications that things are due on a certain day.

Wide range of contexts refers conditions of a workplace that communicates with customers by telephone, and may include but is not limited to – complaints, enquiries, orders, reservations.

Workplace refers to a place of paid or voluntary employment.

Workplace requirements refer to documented policies and procedures or established protocols for workplace performance and may include but are not limited to – any legal requirements, standards, codes of practice, company and/or site procedures, and any industry best-practice documents.
- 3 The following legislation and subsequent amendments provide reference, where needed, for this unit standard:
 - Privacy Act 2020
 - Fair Trading Act 1986
 - Consumer Guarantees Act 1993
 - Credit Contracts and Consumer Finance Act 2003
 - Companies Act 1993
 - Health and Safety at Work Act 2015
 - Human Rights Act 1993.
- 4 Evidence requirements for assessment against this unit standard includes a minimum of three enquiries.

- 5 All assessment tasks are to be carried out in accordance with workplace requirements.

Outcomes and performance criteria

Outcome 1

Establish customer requirements over the telephone.

Range examples of customer requirements may include but are not limited to – normal everyday enquiries, problem solving, enquiries outside the usual range of goods and/or service provision, multiple but linked needs, issue recognition.

Performance criteria

1.1 Call is answered and customer is greeted.

Range examples of greeting requirements may include but are not limited to – consistent welcome message, cheerful tone of voice, positive customer attitude, courtesy, timeliness.

1.2 Active listening skills are used to elicit information.

Range active listening may include but is not limited to – full attention, open and closed questions, clarifying, reflecting, paraphrasing, summarising, questioning, use of silence; evidence of four is required.

1.3 Distressed customers are identified, and action is taken to clarify their needs.

Range distressed customers may include but are not limited to – angry customers, sad customers, anxious customers, confused customers.

Outcome 2

Meet customer requirements and close call.

Performance criteria

2.1 Customer requirements and expectations are analysed.

Range analysis process may include but is not limited to – information search, service boundary identification, application of service and product knowledge, application of complaint handling.

2.2 Any customer requirements outside immediate job responsibilities or capabilities are referred to appropriate person.

2.3 Customer information is recorded.

Range recorded information includes but is not limited to – date, enquiry, action taken, and follow-up requirements.

2.4 Call is closed.

Range closing the call may include but is not limited to – confirmation of agreement made, farewell statement, use of customer's name, invitation to use goods and/or services again, thanks for patronage, positive verbal, next course of action.

Outcome 3

Complete documentation and follow-up procedures.

Performance criteria

3.1 Documentation is completed.

Range documentation may include but is not limited to – records, legal requirements, bring-ups, escalations.

3.2 Follow-up is completed.

Range follow-up may include but is not limited to – internal checks for progress (tracking); progress reports to customers by phone, letter, fax, or e-mail; thank you communications; apology letters for delays; promotional communication.

Planned review date	31 December 2025
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Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	27 April 1998	31 December 2014
Review	2	26 September 2001	31 December 2014
Review	3	16 July 2010	31 December 2015
Revision	4	17 July 2014	31 December 2017
Review	5	17 September 2015	31 December 2023
Revision	6	21 January 2016	31 December 2023
Review	7	28 October 2021	N/A

Consent and Moderation Requirements (CMR) reference	0112
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This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

Comments on this unit standard

Please contact ServiceIQ qualifications@serviceiq.org.nz if you wish to suggest changes to the content of this unit standard.