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## **Deal with incoming telephone calls from customers**

### What this unit is about

Many organisations rely on dealing with incoming telephone calls as a key part of their customer service procedures. Customer expectations are high when calling organisations because they have had an opportunity to prepare for their call. In addition, a proportion of calls start with customers in a negative frame of mind because the caller sees making a call as a way of dealing with a customer service problem. This unit is about being prepared to deal effectively with calls and using effective communications to satisfy customers with the outcome of each call.

When dealing with incoming telephone calls from customers you must consistently:

1. Operate telecommunication equipment efficiently and effectively
2. Speak clearly and slowly and adapt your speech to meet the individual needs of your customer
3. Listen carefully when collecting information from your customer
4. Select the information you need to record and store following your organisation's guidelines
5. Update your customer record during or after the call to reflect the key points of the conversation
6. Greet your customer following your organisation's guidelines
7. Listen closely to your customer to identify their precise reason for calling and what outcome they are seeking from the call
8. Confirm the identity of your customer following organisational guidelines
9. Use effective and assertive questions to clarify your customer's requests
10. Identify all the options you have for responding to your customer and weigh up the benefits and drawbacks of each
11. Choose the option that is most likely to lead to customer satisfaction within the service offer
12. Give clear and concise information to customers in response to questions of requests
13. Use questions and answers to control the length of the conversation
14. Keep your customer regularly informed about your actions when accessing information to provide responses or if they are going to be on hold for a period of time
15. Put your customer on hold and ensure you cannot be heard if you are discussing action with others or calling a colleague
16. Summarise the outcome of the call and any actions that you or your customer will take as a result
17. Check before the call is finished that your customer is content that all their questions or requests have been dealt with
18. Complete any follow up actions agreed during the call
19. Take a clear message for a colleague if you are unable to deal with some

aspect of your customer's questions or requests  
20. Ensure that promises to call back are kept

### Knowledge and Understanding

To be competent at dealing with incoming telephone calls from customers you need to know and understand:

K1. Your organisation's guidelines and procedures for the use of telecommunication equipment

K2. How to operate your organisation's telecommunication equipment

K3. The importance of speaking clearly and slowly when dealing with customers by telephone

K4. The effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone

K5. The importance of adapting your speech to meet the needs of customers who may find your language or accent difficult to understand

K6. What information is it important to note during or after telephone conversations with customers

K7. Your organisation's guidelines and procedures for what should be said during telephone conversations with customers

K8. The importance of keeping your customer informed if they are on hold during a call

K9. The importance of not talking across an open line

K10. What details should be included if taking a message for a colleague

K11. Your organisation's guidelines and procedures for taking action to follow up calls made to customers

K12. Your organisation's guidelines for handling abusive calls