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Make Telephone calls to customers

What this unit is about

Many customer service jobs involve contacting customers by telephone. Making an effective telephone call involves some very specific actions and should not be seen as a casual activity. By making a call to a customer you have the opportunity to prepare and are therefore more likely to be able to lead the conversation in the direction you want it to go. This unit is about planning and making calls to customers in a way that contributes positively to your organisation's customer service.

When you are making telephone calls to customers you must consistently:

1. Use all appropriate customer information to plan your call
2. Anticipate your customer's expectations and assemble all the information you might need before your conversation with your customer
3. Identify the objective of your call and the way in which you expect the call to end
4. Plan the opening part of your conversation with your customer and anticipate their possible responses
5. Operate telecommunications equipment efficiently and effectively
6. Speak clearly and slowly and adapt your speech to meet the individual needs of your customer
7. Listen carefully when collecting information from your customer
8. Select the information you need to record and store following your organisation's guidelines
9. Update your customer records during or after the call to reflect the key points of the conversation
10. Open the conversation positively and establish a rapport with your customer
11. Confirm the identity of your customer following organisational guidelines
12. Ensure that your customer is aware of the purpose of your call as early as possible
13. Respond positively to queries and objections from your customer
14. Summarise the outcome of the call and any actions that you or your customer will take as a result
15. Complete any follow up actions agreed during the call.

Knowledge and Understanding

To be competent at making telephone calls to customers you need to know and understand:

K1. Relevant parts of legislation, external regulations and your organisation's procedures relating to the use of customer information to plan calls

K2. Your organisation's guidelines and procedures for the use of telecommunication technology

K3. How to operate your organisation's telecommunication technology

K4. The importance of speaking clearly and slowly when dealing with customers by telephone

K5. The effects of smiling and other facial expressions that can be detected by somebody listening to you on the telephone

K6. The importance of adapting your speech to meet the needs of customers who may find your language or accent difficult to understand

K7. What information it is important to note during or after telephone conversations with customers.

K8. Your organisation's guidelines and procedures for what should be said during telephone conversations with customers

K9. Your organisation's guidelines and procedures for taking action to follow up calls made to customers