Telephone Standards

Standard	Standard Achieved	Considerable Development Needs
Answer all calls within 30 seconds.	• Answers all calls within given time period.	• Does not answer all calls within given time period.
Security and greeting (uses following) Good morning/Afternoon, HPC, may I take your Application /Registration number. For security purposes….(uses ALL 3 security checks to ID customer) my name is… How may I help?	• Uses standard greeting. • Name given and use of applicants /registrants name. • 3 security questions asked.	• Fails to use standard greeting. Greets the customer in a way that creates a poor first impression, sounds unfriendly /bored. • Name not given, applicants name not used. • Does not ask 3 security questions.
Creates a positive impression by being professional, friendly and interested.	• Addresses the customer by their surname at appropriate times during the call. • Sounds interested and gives customers space to think /respond. • Summarizes understanding of customers needs/wants.	• Addresses the customer using their first name when not invited to do so. • Sounds un-interested. • Interrupts the customer at inappropriate times during the call. • Does not acknowledge the customers feelings and fails to respond to them. • Allows their voice to become sharp, sarcastic, abrupt etc.
Treats every call uniquely.	• Sounds interested. • Creates rapport with customer by giving their full attention. • Is accurate, politely brief and clear, so that the customer	• Sounds uninterested and bored. • Does not adapt to the context of the call. • Shows impatience, and displays a lack

	understands what is happening and why. • Actively listens and acknowledges using empathy and patience.	of empathy. • Calls are unbalanced – too many/few questions. • Too little/much information.
Uses a mixture of open and closed questions to identify customer needs	• Gets the information from the customer by asking the right questions at the right time and in the right way. • Is able to rephrase or adjust questions to aid the customer's understanding and to ascertain the necessary information.	• Does not use different types of questions to obtain specific outcomes. • Is too abrupt or too interrogatory. • Does not get the necessary information efficiently. Asks too many questions when one would suffice. • Loses control of the conversation.
Builds rapport by adapting conversational manner to that of the customer.	• Adapts style to each customer by using the customer's words; if necessary simplifying their language • Work at building the relationship by considering the individual. • Develop mutual respect by seeing things from the customer's viewpoint.	• Does not adapt. • Makes no attempt to build rapport or form positive relationships. • Does not deal with the customer on an individual/unique level. • Talks inappropriately to customers – First name, slang. Jargon and too many technical terms.
Actively listens and demonstrates this by summarising, using the customers own words	• Evidence that they repeat back numbers, details and key words to the customers. • Attention clearly centred on the customer.	• Is easily distracted/not appearing to listen. • Is not attentive /focused on the call. • Is unable to repeat back key points from the

		conversation. • Does not display attentive posture/body language during the call.
Summarises to confirm arrangements, agreements and actions	• Summarises what they and the customer have said. • Gives the customer confidence by confirming all advice, actions and agreements.	• Does not summarise during the conversation or at the end of the call. • Does not confirm any actions or agreements so the customer is confused at the end of the call as to the outcome.
Makes informed decisions using all available information considering the needs of the customer and the organisation.	• Actively listens to the customer and acknowledges to ensure the customer is happy that the issue is fully understood. • Understands the "Big picture"* and uses this when considering the needs of colleagues. • Understands how their actions and decisions may impact others in the team or other areas of the business. • Is able to make a decision regarding course of action to be taken. • Fully explains decision to the customer in a way that is clear and easily understood	• Takes action without considering colleagues and the needs of the organisation. • Unable to make an informed decision due to a lack of business knowledge. • Incorrect decision taken resulting in potential pressure on colleagues. • Does not fully explain the decision to the customer or how the decision was made.
Seeks agreement from the	• Confirms	• Does not make any

customer as to the course of action	understanding, arrangements, agreements and actions. • Uses a confident manner to endorse advice.	attempt to confirm customer understanding. • Does not confirm understanding either during, or at the end of the call.
Provides timescales for agreed actions	• Is able to give definite realistic deadlines and timescales. • Is able to fully explain timescales to the customer. • Actively seeks agreement from the customer. • Takes ownership carrying out agreed actions.	• Does not give a timescale. • Gives an unrealistic timescale. • Does not explain a proposed timescale to the customer, or their explanation isn't clear or easy to understand. • Does not seek agreement from the customer
Offer further assistance, then close call by thanking the customer by name	• Offers further assistance sounding genuine. • Thanks the customer for their call by name. • Knows when extra detail will help, rather than hinder the caller.	• Does not thank the customer when closing the call. • Does not offer further assistance, or does so in an unconvincing manner. • Does not clearly terminate the call.

* "Big Picture"

This refers to the needs of your colleagues, customers and the organisation collectively.
The 'whole' rather than the 'individual parts'.

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