

## Section 1: Understand how to make and receive telephone calls

### Using telephone systems

Please read the following as it will help you answer questions 1, 2 and 3.

When working in a business environment, anyone who deals with administration is most likely going to have to use office equipment, systems and procedures. These will range from telephones to photocopiers, computers to coffee making facilities for guests. Knowing how to operate these and understand what they are for is an essential skill in the business administration department.

Presenting the right image therefore is important and understanding how to make and receive telephone calls appropriately is a part of this image as you will have to speak to colleagues, managers, customers and other people each day.

**Telephone systems** have many different features other than the handset and dials/buttons which are used to handle calls professionally.

- **Call holding** features are those which are used to place a caller on hold whilst you complete another task. This could be to locate paperwork, look up the caller's details and information before speaking to them or contact another colleague whom the caller wishes to speak to
- **Call waiting** features let you know when there is a caller on the line who wishes to speak to you when you are already using the telephone. These are usually lights which flash or tones which beep to let you know there is a caller waiting
- **Re-directing** calls are available on telephone systems where you may be required to forward a call to another colleague. Usually they are features on the telephone which state 'redirect' or 'transfer'
- **Answer phone** features record messages from callers when you or other colleagues are unavailable
- **Teleconferencing** features enable others (more than two people) to hold a 'conference' style conversation over the telephone. These are now often enhanced with video imaging equipment via a computer
- **Text messaging** features enable you to send and receive text style messages (as on a mobile phone).



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**Knowledge Activity 1:** Describe the features of a telephone system which you are used to working with.




Organisation procedures are a set of agreed policies and ways of working which an employer sets out for employees to follow. Most organisations will have established procedures for making and receiving telephone calls. These will be most useful and important if your role in the business administration department means that you often greet and deal with customers, colleagues and others at the ‘face’ of the organisation.

When making telephone calls examples of procedures could include:

- where to locate the correct name and telephone extension of whom you wish to call. This may be via a staff directory or phone book
- the purpose of making the call (in line with company policies)
- how to use the functions of the telephone correctly

When receiving telephone calls examples of procedures could include:

- how you should answer the telephone and the type of greeting to be given
- how to use the functions of the telephone in order to deal effectively with the caller (put them on hold or transfer them to a colleague etc.)
- how you should take and record messages
- how you should identify the caller and then transfer the call to a colleague, passing on their information.

It is important that you are able to use the functions of the telephone correctly and follow organisational procedures so that a positive image of yourself and the organisation is given to callers, customers and colleagues. For example, giving a positive image of yourself and your organisation can attract and retain customers as well as ensure customer satisfaction.

## Section 2: Understand how to handle mail

### Incoming and outgoing mail

Please read the following as it will help you answer questions 4, 5 and 6.

Within most office environments there will be a system and set of procedures for handling incoming and outgoing mail. Staff responsible for receiving and posting mail will have to ensure that:

- incoming mail has been checked that it has been addressed to the correct organisation and sorted by department or person
- incoming mail is correctly received and given to the correct recipient
- outgoing mail is sorted and is correctly labelled with the right postage charge
- outgoing mail is appropriate and relevant to the business (not personal mail).

Mail will be in the forms of parcels, letters, recorded deliveries, packages and other mail (including promotional materials/junk mail etc.).

Within an organisation there will be different internal and external mail systems.

Internal mail systems will involve:

- inter-departmental collection points such as pigeon holes or boxes where staff can collect mail relevant to those working within their department. There may also be outgoing postal trays for mail which comes from a department which then needs to be sent from a central office or location
- site transfer systems – collection and redistribution systems when mail is received into one location but needs to be taken to another (for example, this system would be used when offices are spread out over an industrial park or office block)
- internal envelopes used for mail which is not being externally posted but sent to staff within an organisation.

External mail systems will involve:

- external mail post boxes (centrally located or collected by administrative staff from departments before being posted externally)
- recorded delivery postage
- special delivery postage
- courier services.



