

## Mock Call Exercise 1 – Answering a Basic Enquiry

### Trainer Information

A Customer is calling about....(insert basic enquiry)

1. This is a basic mock call to practise greeting customers, undertaking DPA and identifying the reason for the call. The mock call will end once the reason for the call has been correctly identified.
2. Customer's Profile: Male AGED 50S, Calm and polite (provide when asked) Example: Mr John Evans, D.O.B 14/08/1967, Address 20 High Street, Worcester, WR12 4UZ, Account number 12345678

### Call Guidance for Advisor

1. Greet the customer using the appropriate company greeting and in a polite and friendly tone. Work with alternatives if the customer doesn't have their account number: E.G. Two security questions answered correctly.
2. Identify the reason for the call
  - Actively listen
  - Ask clarifying questions
  - Get agreement on what the call is about
  - Call will end once the reason for the call has been correctly identified and repeated back to the customer.

### Trainer Feedback Checklist

After the roleplaying exercise, the trainer should provide feedback on the following:

- Did the advisor provide the correct company greeting?
- Did the advisor sound confident and welcoming?
- Was correct DPA carried out and alternative questions asked when needed?
- Was there a good use of questions to correctly identify the reasons for the call?
- Did the advisor demonstrate good listening through verbal nods and by repeating back information to check understanding of the issue?
- Did the advisor access the correct account information?
- Was the correct call structure followed?

