A SOUTH AFRICAN QUALITY ASSURANCE (SAQA) ACCREDITED TRAINING FRAMEWORK FOR TELEPHONE ETIQUETTE AS A UNIT OF OFFICE ADMINISTRATION

STEPHANIE MYRA STEENEKAMP

Treatise submitted in partial fulfillment of the requirements for the

**MASTER'S DIPLOMA IN TECHNOLOGY:
OFFICE ADMINISTRATION**

In the

Department of Secretarial Studies
Faculty of Management
at the

Technikon Free State

Supervisor: Dr. A Lotter (BA Ed, B.Ed, M.Ed, D.Ed)
Co-supervisor: Mr. A van den Berg (M. Comm, HED)

PRETORIA
October 2000

DECLARATION OF INDEPENDANT WORK

I, STEPHANIE MYRA STEENEKAMP, do hereby declare that this treatise submitted to the Technikon Free State for the treatise MASTER'S DIPLOMA IN TECHNOLOGY: OFFICE ADMINISTRATION, is my own independent work that has not been submitted before to any institution by myself or any other person in fulfillment of the requirements for the attainment of any qualification.

SIGNATURE:

DATE: 22/01/2001.

Acknowledgements

Thank you ---

To Dr. Annette Lotter for her inspiration, support and leadership, but above all believing in me;

To Elmarie Cronje for her willingness and help with the editing, and her encouragement;

To Thea Visser for her encouragement to complete this study.

Summary

The aim of this study is to develop a training framework for Telephone Etiquette in terms of the South African Qualifications Authority (SAQA). This refers also to the determining of the NQF-level of competence.

The objectives of the study are:

1. To develop existing Telephone Etiquette with regard to requirements of Corporate Business by interviewing respondents from industry and tertiary institutions.
2. To design a framework for a learning curriculum.

Qualitative research methods are used. Interviews with respondents in industry and lecturers from Institutions of Higher Learning, who are presently engaged in the training of telephone etiquette, were undertaken.

The data obtained is categorized in three categories:

1. Content and methodology of present courses
2. Present application of Telephone Etiquette, and
3. Needs and problems.

Chapter 1 deals with the rationale, aims and objectives.

Chapter 2 refers to the research design and methodology.

Chapter 3 deals with the description of data referring to categories 1 and 2 as indicated above.

Chapter 4 refers the data on the needs and problems, as indicated in category 3 above.

Chapter 5 refers to a literature control and covers material relevant to the methodology of training in terms of SAQA, the structure of the NQF as well as communication and interpersonal skills related to Telephone Etiquette.

In Chapter 6 the conclusion and recommendations are discussed.

The present status and needs of Telephone Etiquette as a curriculum are indicated in Fig. 4.5 and refers to:

1. The Design,
2. Dissemination/training of lecturers
3. Evaluation, and
4. Implementation methodology.

The data contained in Fig. 4.3 clearly indicates that Dissemination and Evaluation is non-existent, which implies that the development of a curriculum for Telephone Etiquette is designed by one set of specialists while lecturers implement the curriculum without input from students or industry or guidance from the curriculators.

Data to be included in the curriculum for Telephone Etiquette is indicated in Fig. 4.3 and is printed in red.

After analysis of the data the recommendations are the following:

1. That the training of Telephone Etiquette remains an important unit of Office and/or Business Administration and should be included in all programs taught at Institutions of Higher Learning.
2. The practical training on Telephone Etiquette is implemented to the maximum.
3. The time allocated and the content of the course should be standardized.
4. Serious attention is given to the training of Telephone Etiquette to accommodate requirements set by industry with special reference to call centers.
5. The use and application of e-mail, answering services and tele-sales be included.
6. The name of the unit/course be standardized and be referred to as "Telephone Management Skills."
7. That clear outcomes be formulated to adhere to the requirements set by SAQA and the NQF.
8. That the curriculum in future be designed and developed according to sound curriculum criteria and principles.

Central University of Technology, Free State

Opsomming

Die doel van hierdie studie is om 'n Opleidingsraamwerk vir Telefoon Etiket te ontwikkel om te voldoen aan die vereistes soos gestel deur die Suid-Afrikaanse Kwaliteits Outoriteit (SAKO). Dit verwys ook na vlakke van bevoegdheid in terme van die Nasionale Kwalifikasie Raamwerk (NKR).

Die doelwitte van die studie is:

1. Om deur onderhoudvoering met industrie en tersiêre inrigtings bestaande Telefoon Etiket te ontwikkel volgens die vereistes van Korporatiewe Besigheid.
2. Om 'n raamwerk vir kurrikulum ontwerp, te ontwikkel.

Kwalitatiewe navorsingsmetodes is toegepas. Onderhoude met respondente in die industrie en dosente by Inrigtings vir Hoër Opleiding, wat tans Telefoon Etiket doseer, is onderneem.

Die data versamel is in drie kategorieë verdeel, naamlik:

1. Inhoud en metodologie van huidige kursusse
2. Huidige toepassing van Telefoon Etiket, en
3. Behoeftes en probleme.

Hoofstuk 1 verwys na die rasionaal, doelwitte en doelstellings.

Hoofstuk 2 verwys na die navorsingsontwerp en metodologie.

Hoofstuk 3 verwys na die beskrywing van data met verwysing na kategorieë 1 en 2 soos hierbo na verwys.

Hoofstuk 4 verwys na die data met betrekking tot die behoeftes en probleme, soos verwys na kategorie 3 hierbo.

Hoofstuk 5 verwys na 'n literatuurstudie relevant tot die metodologie van opleiding in terme van SANKO, die struktuur van die NKF asook kommunikasie en interpersoonlike vaardighede met betrekking tot Telefoon Etiket.

Hoofstuk 6 vervat die gevolgtrekkings en aanbevelings.

Die huidige status en behoeftes van telefoon etiket as 'n kurrikulum word na verwys in Fig. 4.3 en verwys na:

1. Die Ontwerp
2. Disseminasie/opleiding van dosente
3. Evaluasie
4. Toepassingsmetodologie.

Die data soos vervat in Fig. 4.3 wys duidelik dat Disseminasie en Evaluasie nie bestaan nie. Dit dui daarop dat die ontwikkeling van die kurrikulum vir telefoon etiket ontwerp is deur 'n enkele groep deskundiges, en dat dosente studente oplei sonder insette van studente, industrie of onderleiding van die kurrikuleerders.

Data wat in die kurrikulum vir telefoon etiket ingesluit behoort te word, word weergegee in Fig. 4.3 en is in rooi gedruk.

Na analise van die data word die volgende aanbevelings gemaak:

1. Dat die opleiding in Telefoon Etiket 'n belangrike eenheid in Kantoor/Besigheids-administrasie is en behoort in alle kwalifikasies wat aangebied word by Inrigtings vir Hoër Opleiding, ingesluit te word.
2. Dat die praktiese toepassing van Telefoon Etiket tot die maksimum aangewend moet word.
3. Die tyd aan die kursus bestee asook die inhoud gestandardiseer word.
4. Ernstige aandag aan die opleiding van Telefoon Etiket gegee word met insluiting van die behoeftes van kliënte skakel dienste ("call centers").
5. Dat die toepassing en gebruik van e-pos, telefoon antwoord diens en tele-verkope by die kursus ingesluit word.
6. Die naam van die kursus gestandaardiseer word en na verwys word as "Telefoonbestuur en Vaardighede".
7. Dat duidelike uitkomste geformuleer word ten einde te voldoen aan die vereistes soos gestel deur SAKO en die NKF.
8. Dat die kurrikulum in die toekoms volgens betroubare kurrikulum kriteria en beginsels ontwerp en ontwikkel word.

INDEX

CHAPTER 1: RATIONALE, AIMS AND OUTCOMES

CHAPTER 2: RESEARCH DESIGN AND METHODOLOGY

CHAPTER 3: DESCRIPTION OF DATA
Categories 1 & 2

CHAPTER 4: NEEDS AND PROBLEMS
Category 3

CHAPTER 5: LITERATURE CONTROL

CHAPTER 1: RATIONALE, AIMS AND OUTCOMES

1.1 Introduction

In this chapter the rationale, aims and outcomes for the study as well as the research methodology will be formulated. Relevant terminology will be defined.

1.2 Rationale

Technikons, like all Institutions of Higher Learning and other training providers are presently in a transformation period. The changes have come about with the instituting of the National Qualifications Framework (NQF) and the structures and policy contained therein. These changes need to be instituted as to adhere to requirements as published in the "**South African Qualifications Authority Act, 1995 Act Number 58 of 1995**", which is based on the concept of **"Outcome Based Education" (Government Gazette Vol. 393, Num 18787)**. Hereafter referred to as **SAQA**, (South African Qualifications Authority).

At present Institutions of Higher Learning offer Telephone Etiquette in different programs, different units and for different lengths of time. In some cases it forms part of the Communications program, for others it forms part of Office Administration, Secretarial Practice, Office Management or Commercial Administration. At Other institutions Telephone Etiquette is offered as a stand-alone certificate. The period of time spent on this unit differs from one institution to the other, so also does the application in practice, as well as the outcomes required. The training of Telephone Etiquette is also undertaken by other training providers such as corporate companies and is offered as in-house training.

Research is to be directed towards the "unit" Telephone Etiquette, as is presently contained in Commercial Administration/ Office Administration/ Secretarial Practice/ Communication. As a result of this study, it would be possible to determine the unit standards, the credits applied to the unit, outcomes, recommendations, a model design for the learning curriculum, as well as the entry requirements and evaluation standards could be determined so as to adhere to the requirements of the NQF. From this study the skills, practice and knowledge on telephone usage and etiquette, needed for different positions/qualifications or circumstances, are to be determined.

Good Telephone Etiquette is of importance for everyone, no matter what occupation. Nobody in any organization, undertaking or institution can ignore this fact. In an analysis done by **Career Success (August 1997: 16)**, on the time spent per day on secretarial duties, 74% of the day was taken up by using the telephone. In the same study it came apparent that 59% of the test sample enjoyed doing telephone related tasks.

Telephone Etiquette is not important only for the secretary but applies to every person who in his/her daily tasks needs to use the telephone.

The manner in which the telephone is handled will determine whether further business will be done with the organization, or not. When phoning a business organization, the persons who answers the phone, whether it be the switchboard, the secretary or any member of staff, there is but one chance to make a first impression. This will be a lasting impression. **"...when a customer contacts you by phone, they have nothing visual on which to base their judgment of the standard of service they will receive. Therefore the impression they will form of you and the company is based entirely on the way the call is dealt with. It is therefore vitally important that you make every effort to create a favourable impression which will encourage the customer to do business with you" (Burton, 1997: 48).**

Botha agrees by stating that, **"...besides direct face to face interaction, telephone conversations are the second most important and most frequently used means of getting a message across. But, it is by far the most risky form of communication" (Botha, 1992: 25).** With face-to-face communication there is the other person's non-verbal communication and reactions that indicates how the other party feels or reacts to you. **"In the case of telephone communication this is not so, and the tone of voice and words used are the only means of judging the other party's reaction to your message" (Botha, 1992: 25).**

As stated above, first impressions are lasting impressions. Once a negative first impression has been created, it is difficult, if not impossible to change that impression. This is important in any form of communication, but more so when answering a telephone call. The other party has got only a voice to judge by. **"The first and indeed the principal factor to be born in mind is that the medium is oral and aural but not visual! Telephone users often refer to the 'disembodied voice' which is more difficult to understand and which may be prone to communication breakdowns…" (Evans, 1990: 180).**

Aspects to receive attention in this study are:

- Identifying oneself when answering incoming calls
- Preparations to be made before incoming and outgoing calls
- Making of outgoing calls
- Transferring calls
- Putting calls on hold
- Handling incorrect calls
- Closing the call professionally
- Phrases used
- Phrases not to be used
- Importance of listening
- Language proficiency
- Language preference
- Handling the abusive caller, the smooth caller and sexual harassment
- Screening calls
- Handling of the manager's private calls and family matters
- Receiving and taking of messages
- Follow-up on voice mail messages

- Handling of complaints
- Making use of an answering service
- Influence of the voice, volume, tone and speed. The application of these aspects makes telephone usage a skill. Telephone users are often of the opinion that they use the telephone correctly, but this is not always so. "**Not all people are skilful when it comes to telephone communication" (Botha, 1992: 25).**
- Posture, because, **"Posture is quite important when speaking on the telephone, even though the caller cannot see you, the way you are sitting will affect the way you sound" (Burton, 1997: 55).**
- Answering and etiquette regarding Cellular telephones
- Handling of tele-sales.

1.3 Problem statement

A learner's entrance skill for Telephone Etiquette is considered important. Popular research has confirmed that insufficient entrance skills with regard to Telephone Etiquette and the future success could be influenced directly or indirectly.

It seems that training in Telephone Etiquette at Institutions of Higher Learning, Private Institutions and other learning providers is under emphasized.

The problem to be addressed in this study is to research the need for and the application of Telephone Etiquette at Higher Institutions, Corporate companies and other training providers.

Because of the present diversity of undertakings in South Africa there might be new factors coming to the fore with regard to Telephone Etiquette/usage that should be included in the relative program.

1.4 Aim

The aim of this study is to develop a training framework for Telephone Etiquette in terms of the South African Qualifications Authority (SAQA). This includes the determining of the NQF-level of competence.

The training framework should serve as a guideline for all qualifications in Telephone Etiquette being a unit of Office Administration, Office Management, Secretarial Practice, Switchboard operating, Reception or Secretarial Training. This should apply to all training providers as defined by SAQA.

To reach the above aim, the following objectives are relevant:

1.4.1 <u>Objective 1</u>

To evaluate existing Telephone Etiquette with regard to the requirements of Corporate Business by interviewing respondents from industry and tertiary Institutions of Higher Learning.

1.4.2 Objective 2

To design a framework for a learning curriculum.

1.5 Research Methodology

The qualitative method is to be applied in this study. A literature study will also be undertaken to research Telephone Etiquette and to determine the requirement in terms of NQF.

Qualitative research methods will be used to collect data by means of focus interviews with respondents in industry to determine their requirements and their rating of present training undertaken by Higher Education Institutions, interviews with lecturers who are presently engaged in training of Telephone Etiquette, and students in the work place, who have completed programs which include Telephone Etiquette.

Secondly data will be obtained by transcriptions compiled by observation and documentation of videos and tapes. These transcriptions will be qualitatively analysed by means of documentation.

The analysis and outcomes are to be confirmed and/or disputed by applicable literature. The creditworthiness of this study should be increased as both qualitative and quantitative research methods are used.

It is clear that in this study different methods of research and – analysis are triangulated.

1.6 Clarification of terminology

The following concepts might be understood and used differently, therefore, for the purpose of this study the following terminology should be understood as follows:

1.6.1 Telephone Etiquette

Etiquette and good manners are synonym. Good manners begin with self-respect. A person who has self-respect is able to accept and perform common courtesies.

Business etiquette means to give and take, helping one another when and where help is needed. Social etiquette, on the other hand has it's own traditional set of rules **(Dunckel 1992: xvi).** This implies that every worker who uses the telephone needs to acquire knowledge regarding acceptable local and relevant international etiquette related to telephonic interaction.

1.6.2 Telephone skills

According to **Burton (1997: 29)** a skill is something that: **"...comes with practice. It is the degree of deftness and efficiency with which you are able to perform your job. Some jobs demand a high degree of skill, which takes time to acquire."**

Telephone skills are more complex soft skills as it entails skills related to verbal interaction, writing skills, posture and attitude. Attitude implies a vast level of inter-personal and diverse people knowledge.

1.6.3 Telephone techniques

Hornby (1981: 673) defines "technique" as: **"…technical or mechanical skill in art, music etc. and 2 method of doing something expertly…"**

Telephone techniques would therefore assume techniques related to the operation of for, example, the switchboard, various telephone instruments, and handling of e-mail, answering machines and computerized telephones.

1.6.4 Outcomes Based Education (OBE)

Van Der Horst and McDonald, (1997: 7) defines Outcomes-Based Education as: **"… an approach which requires teachers and learners to focus their attention on two things:**

*** Firstly the focus is on the desired end result of each learning process. These desired end results are called the outcomes of learning and learners need to demonstrate that they have attained them. They will therefore continuously be assessed to ascertain whether they are making any progress.**

*** Secondly, the focus is on the instructive and learning process that will guide the learners to these end results. Teachers are required to use the outcomes as focus when they make instructional decisions and plan their lessons.**

Outcomes-Based Education is thus a learner-centered, results-orientated approach to learning ..."

The Education Information Center (EIC), (1997: 22) indicates the following with regard to OBE: **"In outcomes-based education and learning, learning programmes replace the syllabus. The learning programmes will be designed to assist learners to achieve the outcomes"**(see paragraphs 5.2.1, 5.2.1.1, 5.2.1.2, 5.2.1.3 and 5.2.1.4).

1.6.5 South African Qualifications Authority (SAQA)

S.A.Q.A refers to the South African Qualifications Act, 1995, Act Number 58 of 1995. This act is based on the concept of OBE.

Olivier, (1999: 11) refers to the aim of the SAQA Act as:

"To provide for the development of a National Qualifications Framework and for these purposes to establish the South African Authority, and to provide for matters connected therewith" (see par. 1.2).

1.6.6 National Qualifications Framework (NQF)

The NQF is a new approach to education and training in South Africa in that it provides for life-long learning, which means it provides the opportunity to learn on an ongoing basis **(EIC, 1997: 6).**

Olivier, (1999: 17) indicates that: **"The NQF can also be seen as a menu from which learners can choose to establish individual learning paths"** (see par. 5.2.1.5).

1.6.7 Outcomes

In the booklet: **"Understanding the National Qualifications Framework," (1997: 8),** outcomes is referred to as: **"...anything you can show that you can do."** It is also referred to as meaning: **"...other things. Like having ideas, understanding things, knowing how to make decisions and how to solve problems. And having good personal skills, like being able to communicate well, and many more."**

Olivier, (1999: 35) indicates 3 kinds of outcomes that should be achieved to qualify for a credit, unit standard or qualification and: **"...learners should be able to demonstrate that they achieved the following outcomes at a specific level:**

a) Critical cross-field outcomes which are designed by SAQA and apply to all learning areas.

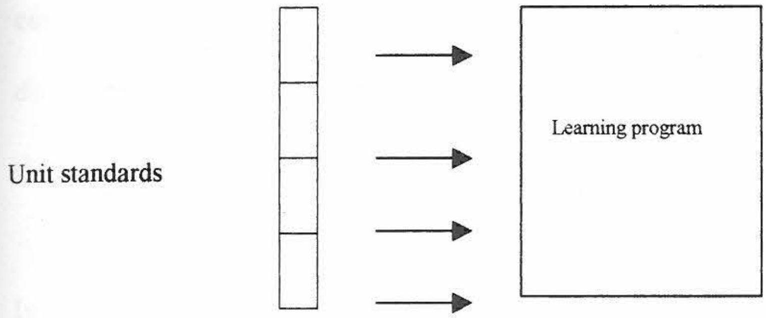
b) Specific outcomes, which means contextually demonstrated knowledge, skills and values.

c) **Outcomes which means the contextually demonstrated end product of learning."**

1.6.8 Unit standards

The learning program is made up of various unit standards.

The **(EIC, 1997: 23)** indicates the following with regard to unit standards:



According to **Olivier, (1999: 33) "Unit standards are nationally agreed and comparable statements supported by specific outcomes and their associated assessment criteria together with other relevant and needed information."**

The purpose of unit standards is to provide:

a) an assessor document;

b) the basis to develop learning programmes; and

c) an educator's and trainer's guide for preparing learning material.

"Unit standards must express clearly defined learning outcomes associated with clearly defined criteria in order to ensure that standards are adhered to" (Olivier, 1999: 35).

1.6.9 Assessment criteria

Pahad, (1997: 5) defines assessment as **"...the process used to decide if the learner is competent or not. A learner must show that he or she knows, understands and can do whatever is required to demonstrate competence."** With reference to the NQF, these requirements are the specific outcomes.

In this regard **Olivier, (1999: 201)** states: **"Outcomes-based assessment means assessing knowledge, skills and values as they are mastered when integrated learning processes are followed within a specific context to achieve a pre-set outcome. The assessment process should not be seen as a means in itself and in isolation from the learning process, but should be regarded as part of the learning process."**

Those learners who do not meet the criteria during the said learning, should attain clear feedback and support from educators to attain the required standard.

Olivier, (1999: 202) also indicates that: **"The assessment criteria are statements, which assist facilitators and learners to provide evidence to decide whether an outcome or aspect thereof has been fused together neatly"** (see par.5.2.1.7).

1.6.10 Credits assigned

The **EIC, (1997: 14)** refers to the following being a credit: **"A credit is the formal recognition that you have achieved understanding knowledge and skills in a particular area or section of learning – these are the essential and specific outcomes. These outcomes are written in the form of a unit standard, which states what you are capable of doing. You will be awarded credits for each unit standard you complete successfully."**

A unit standard is valued as one credit, which is equivalent to ten hours of learning.

1.6.11 Design modes for learning curriculum

This aspect is best described by **Olivier, (1999: 129)** when he refers to: **"Learning programmes are the vehicles through which curricula are implemented within delivery systems, such as schools or computer-based interactive learning. Outcomes-based learning programmes are developed to serve as guidelines that will allow teachers** (educators) **to be innovative and creative in directing learners to achieve outcomes.**

A learning programme consists of specific outcomes selected from individual areas of learning, which permits learners to achieve outcomes. Learning programmes are also sets of learning activities in which learners will be involved while working towards the achievement of sets or clusters of specific outcomes. These learning programmes are taken up and published as curricula."

1.6.12 Articulation possibilities

The NQF paths the ways to move between education and environments once the necessary credits have been obtained. This implies that there can be movement from a work situation to a study situation and back again, depending on personal circumstances and choices.

Recognition of prior learning is also granted. This means that recognition is granted for learning obtained in either formal or informal situations. Assessment will be done on gained understanding, information and skills. From this information it will be determined at which appropriate level a learner is placed.

"Learning and skills which people have acquired through experience and on-site training or self-education could be formally assessed and credited towards certificates, in order to enable them to qualify for entry to additional education and/ or training" (White Paper on Education and Training, 1995).

Central University of Technology, Free State

1.6.13 Qualification as defined for the purpose of the NQF

"The SAQA Act defines a qualification as the formal recognition of the achievement of a range of credits embodied in a coherent number of unit standards. The term "coherent" emphasis the fact that a random cluster of achievements will probably not lead to a qualification granted by SAQA" (Olivier, 1999: 30).

A qualification thus refers to a formal recognition of achievements of a required number and type of credits indicated at a specific NQF level (see Fig. 4.1).

According to **Olivier, (1999: 30) "All qualifications contain three categories of standards, namely:**

1) Fundamental elements...

2) Core elements ... and

3) Elective elements ..."

1.7 Program of Investigation

Chapter 1 refers to the rationale, aims and objectives.

Chapter 2 refers to research design and methodology.

Chapter 3 refers a description of data as indicated in Categories 1 and 2.

Chapter 4 refers to the needs and problems related to the training of Telephone Etiquette as indicated in Category 3.

Chapter 5 refers to a literature control and categories of themes as identified during the interviews will be compared with the available literature.

Chapter 6 contains the conclusion and recommendations after analyses of the data.

1.8 Summary

In this chapter the rationale, aims and outcomes were discussed. Reference was also made to the different aspects regarding Telephone Etiquette that are to be included as well as the clarification of certain concepts.

In chapter 2, the design and methodology used for this study will be discussed.

CHAPTER 2: RESEARCH DESIGN AND METHODOLOGY

2.1 Introduction

"Those who become investigators quickly learn that the formal, pre-planned design is no more than a framework within which imaginative, catch-as-catch improvisation does the productive work. Planned treatments go awry, and surprises lead the investigator down new paths" (Cronbach, 1982: 99).

This chapter seeks to discuss theoretical research methodology issues, that is, the qualitative paradigm and the influence on research methodology with specific reference to this study. This explains and justifies the choice of techniques employed for gathering data. In this case and, in particular, in order to put into perspective the methodological approaches, the researcher regards the outline and reflection on the process of development of the study, especially with reference to methods, as very important and worthy of mention. This is essentially a presentation of the pilot process in a narrative form due to the nature of the research.

The experience and lessons learnt by the researcher are cherished and have demonstrated quite well the pitfalls of going into the field without adequate theoretical background reading. This could also be a lesson to those who may read this piece of research.

Even though it is not necessarily forbidden to become involved in fieldwork prior to literature review **(Bogdan & Biklen, 1992: 79-135)**, it is advisable to read widely and be confident about the research methods one intends to use for a research project.

2.2 The research paradigm

Distinctions between qualitative and quantitative research are firmly entrenched in a number of social science disciplines **(Elsworth, 1994: 321).** These have different philosophical premises, and epistemic roots that must be understood, respected and maintained for credible and sound research outcomes **(Leiniger,)** in **Morse, (1994: 101).**

An appropriate form of research is one, which includes consideration of both human consciousness, and political action in order to answer moral questions about issues, which the scientific approach, cannot **(Robottom & Hart, 1993: 54)**. Human ideas, experience and intentions are not totally things like molecules and atoms **(Wals, 1992: 47)**.
Qualitative research that emphasizes description, induction, grounded theory and eliciting people's understanding and opinions, is therefore the ultimate alternative.

"The laboratory of the qualitative research is everyday life and cannot be contained in a test tube, started, stopped, manipulated or washed down the sink" (Morse, 1994: 1).

Many terms, such as constructivist approach, interpretative approach, post-positivist or post-modern perspective **(Creswell, 1994: 4)** is used to describe the qualitative paradigm. **Guba and Licoln, (in Keeves, 1988: 82)** speak of the naturalistic paradigm. They site its characteristics and benefits as, for example, that it offers a contextual relevance and richness unmatched by any other paradigm. Naturalistic approaches take full advantage of not considering humans as instruments, providing a more than adequate trade-off for the presumably more "objective" approach that characterises scientific inquiry **Guba and Lincoln (in Keeves, 1988: 83).**

Fraenkel and Wallen, (1993: 382) illustrate the major characteristics of qualitative research as being its ability to generate detailed data with rich descriptions of what is being studied. The research is in-depth and tends to rely on direct quotations reflecting people's personal perspectives and experiences. This follows an inductive analysis approach where important categories of data, dimensions and interrelationships emerge from the data.

2.3 Research design

It is noted that rigid rules cannot be set for making decisions on data collection methods **(Patton, 1987: 9).** A qualitative, explorative, descriptive and contextual design was deemed most appropriate for this research project **(Yin, 1989: 16; Merriam, 1991: 111).** In qualitative research: **"...research questions are not framed by operationalizing variables, rather, they are formulated to investigate topics in all**

their complexity, in context ... people conducting qualitative research may develop a focus as they collect data, they do not approach the research with specific questions to answer or hypothesis to test. They also are concerned with understanding behaviour from the subject as own frame of reference" (Bogdan & Biklen, 1992: 2).

The view is supported by **Fraenkel and Wallen, (1993: 3-82)** and **Morse, (1994: 1)**, who state the process of qualitative research presents a challenge as procedures for organising images are ill-defined and rely on processes of inherence, insight, logic, and luck, and eventually, creativity and hard work.

However unlike quantitative data collection, qualitative methods permit the researcher to study selected issues, cases or events in depth and detail, the fact that data collection is not constrained by predetermined categories of analysis, contributes to the depth and detail of qualitative data **(Patton, 1987: 9).**

This is rather true for qualitative investigation where prediction and selection of methods and instruments are not possible in fourth-generation research because of variation in the issues, claims and concerns put forward by the stakeholders **(Swanson & Chapman, in Morse, 1994: 69).**

The choice of research tactics follows not from the research doctrine, but from the decision in each case as to the best possible available techniques; therefore, the problem defines the method. Equally, no method is used exclusively or in isolation. Different techniques are combined to throw light on common problems **(Partlett and Hamilton, 1976: 92).** This means that data collection usually involves multiple research techniques in order to obtain sufficient data about aspects of what is investigated **(Janse Van Rensburg, 1994: 15).**

The questions that are asked determine which strategy is best suited for the specific type of research strategy. If the question is largely 'how' or 'why' **(Yin, 1989: 12)**, as in the case of this research, then the research is explorative and explanatory.

The research methodology has to match the needs of the research. According to **Merriam, (1991: 20)** qualitative research is descriptive and, one of the main objectives of the project is to describe holistically. The aims of the research are not to generalise but to provide a comprehensive description of the research investigated and hope to uncover the interaction of significant factors and characteristics.

2.4 Reliability and validity of the study

The issues of reliability and validity are inherent methodological problems in qualitative research for as **Rudestam and Newton,** put it, **"...one cannot separate the investigator from the object of inquiry" (1992: 31).** Therefore this study does not lean on the notion of objectivity in studying a human phenomenon as often happens in experimental and quasi-experimental studies of quantitative design **(Kincheloe, 1991: 142).**

Reliability refers to the repetition of same study under similar situations so that they can reach similar conclusions **(Hopkins and Newton 1996: 149; Rudestam and Newton, 1992: 38).** In this research, the problem of reliability is likely to be addressed by taking the transcription from the tape to each respondent interviewed. The researcher requested each respondent interviewed, to read the transcripts carefully and to sign if it is correct. The researcher requested the respondents to correct the script or edit as needed.

In addition, the researcher will also give the transcripts and the protocol to a external decoder whose observations and/or categorisation of the data will be collaborated with those of the researcher. This is likely to increase the reliability of the observations from the interviews consulted. Reliability therefore, means consistency of the observations; **(Kincheloe, 1991: 127, Stanfeld, 1993: 71).**

The issue of validity as defined by **Stanfeld, "... addresses itself to the truth of an assertion that they make about something in the empirical world" (Stanfeld, 1993: 69).** It was felt that to obtain a degree of greater truthfulness, the respondents remained anonymous. **Mouton and Marais, (1990: 86-88)** argued that in other instances validity demands knowing how the respondents interpret questions. In this research a interview schedule was used to ensure that each respondent correctly interprets each question (see Annexure A).

Gay, (1992: 155-160) and **Marshall and Rossman, (1994: 144)** feel we can divide validity into two types: external validity and internal validity. External validity relates to the extent of the applicability of research findings to other contexts. The other problem is that of internal validity which refers to the consistency of the effect of the interview questions. This means that the interview questions must be able to measure what they are intended to measure. To ensure internal validity, the researcher repeated the research questions in similar format, and made follow-ups on certain ideas to ensure content validation **(Kerlinger, 1986: 418; Walford, 1994: 97).** The internal validity of the research was further enhanced through triangulation with various groups of respondents. This ensures the validity and trustworthiness of the data.

2.5 Method of data collection

Strauss and Corbin (1996: 18)"...maintain that qualitative research demands certain requisite skills which are to step back and critically analise situations, to recognise and avoid bias, to obtain valid and reliable data, and think abstractly."
The choice of qualitative research for this study was determined by a reflection on the nature of the problem, which focused on various experts, personal perceptions and requirements for a curriculum on Telephone Etiquette. This research attempts to uncover the nature of students' experience with the curriculums of which little is yet known as revealed in the literature review in Chapter Two. Qualitative methods were therefore a better choice than quantitative methods as it gives intricate details of the phenomenon under study.

However, **Burgess, (1993: 77-78)** for example, shows that various researchers use various research strategies of qualitative methods for data gathering and analysis. In trying to overcome problems associated with quantitative research, the researcher reflected on focus group interviews among others, as qualitative research strategies for this research.

For this study data was obtained by conducting personal interviews with identified respondents. Pre-prepared questions were put to the respondents and further questions followed on answers supplied. Interviews were tape-recorded and verbatim transcriptions compiled.

2.6 Population of the study

The population of this study consisted of 3 categories of experts namely, employers, secretaries and lecturers. Possible respondents were identified at random from interaction and relationships in the work environment. Respondents were contacted telephonically and interviews arranged. Follow-up telephone calls were made confirming dates and times for the interviews. The respondents who availed themselves were interviewed. (See par. 6.8).

Ten respondents were interviewed through semi-structured focus interviews. Each group of respondents were selected by using the following criteria:

Employers: Senior employers who, in the work environment, deal with staff who have regular external, internal and international telephone interaction and where the "image" of the organization is of great importance.

The inclusion of Corporate Business in the study is to obtain relevant documentation with regard to Telephone Etiquette, conduct interviews with staff that are engaged in telephone interaction and to observe the conducting of telephone interaction. Valuable information regarding present standards set by Corporate Business is obtained.

Secretaries: Experienced members of staff, who fulfill the role of secretary, and who, in their daily work environment, have internal, external and international telephone interaction.

Lecturers: Lecturers, who lecture in qualifications and/or subjects where Telephone Etiquette is included, and where possible, have corporate experience, were selected. Relative valuable data is obtained from manuals and/or study guides used.

All three categories of respondents were willing to be interviewed in English and agreed on having the interview recorded.

2.7 Sampling

Ten respondents from the three categories were interviewed by means of semi-structured interviews.

2.8 Pilot study

To determine the relevance and correctness of the research questions, related to the aim of the study, the first respondent interviewed was a lecturer. After this pilot interview the data was analysed to check the thickness of description of data and relevance of the relevant questions. Where necessary questions were changed, ruled out and/or adapted.

2.9 Interviews

Scholars in research studies describe an interview as the face-to-face conversation of an investigator with the subject **(Marshall & Rossman, 1994: 80). Allison, (1993: 25),** also agree and regard an interview as an encounter between two persons started by the interviewer for obtaining research-relevant data. In dissertation, the researchers take an interview as a research technique carried out with a definite purpose of gathering data by means of a spoken word using a planned series of questions.

Burgess, (1993: 6), Gall, Borg and Gall, (1996: 305-306) and identified several types of interviews: first, the structured interview in which the researcher poses a set of questions and record responses on a standardised schedule. Such research will be based on a structured interview where the respondents are expected to declare their experiences in a set format. **(Kember & Kelly, 1993: 15).**

Secondly, the unstructured interview in which the researcher is free to modify sequence of questions or wording of questions can be chosen. During the unstructured interviews, free responses are given in the respondent's own words, and the researcher exerts little control over his subjects. The researcher will allow respondents to offer responses in a flexible manner but will still guide and motivate the respondents through follow-ups to their responses.

Thirdly, there are individual interviews, which are conducted, in a private setting with one person at a time. Individuals feel free and express themselves trustfully **(Walford, 1994: 97).**

Fourth, there is the focus group interviewing which is a technique in which the groups are generally composed of seven to ten people. However the range can vary from as small as four and as large as twelve members. The participants are unfamiliar to one another and have been selected because they share certain characteristics, which are relevant to the study as would be shown in the paragraphs to follow.

In any focus interview, the interviewer creates a permissive atmosphere by asking questions eliciting discussions and expression of differing opinions and views. These types of interviews are conducted several times for the researcher to identify trends in the perceptions and opinions expressed. This method assumes that an individual's attitudes and beliefs are borne out of the society. People need to listen to other' opinions and understandings in order to form own. Individual interviews were chosen for this study because of the sensitivity of the topic and position of respondents chosen.

At the same time, the target group is also homogeneous, as it is comprised of respondents with similar expertise and position in company.

In this research study the unstructured individual focus interview will be used to collect data.

2.10 Steps for data collection

In collecting data for this research, the researcher followed the following steps to ensure the success of the individual focus group interview as a technique for collecting empirical qualitative data as suggested by **Allison, (1993: 129-13 1); Kingry, et al (1990: 124) and Sekeleko, (1997: 25-26)**

Step one: The researcher obtained permission to conduct interviews from each respondent and their company, while ensuring confidentiality of data.

Step two: The interview schedule is set up well in advance. The researcher sends the interview schedule to the interviewees two weeks in advance so that they can reflect and familiarise themselves with the interview schedule. Hence this step will ensure that respondents are prepared for the process. This will not affect the reliability and the validity of the study in that the study is a qualitative research and searches for definite patterns and values of a social phenomenon that cannot rely on the number of times a particular response was given. Hence follow-up questions will be made so as to limit any possible effect on the reliability of the research instruments due to the pre-view of the interview schedule. This is also likely increased the validity of the interview schedule as the research instrument for this study.

Step three: Dates for interviews are confirmed and the researcher sends reminders ten days before the actual days for interviews.

Step four: The researcher is prompt and follows the agenda. At the beginning of each interview the researcher introduces him/her self and explains the purpose and importance of the study again. The researcher explains the purpose of the interview and that the use of the tape-recorder, as a way of ensuring that everything that will be said, is well captured. The researcher guarantees confidentiality to all respondents.

Step five: The researcher conducts the interviews until the respondents start to repeat similar views and issues.

Step six: The researcher translates each interview verbatim into a written typed script. The typed transcripts are distributed to the respondents who have to acknowledge their accuracy. The researcher also requests permission to utilise the data for the study. This step also serves as a reliability check for the study.

All these steps are followed to ensue that there is no discrepancies between the respondent's contribution and the data collected by the researcher for this study. The individual focus interview data is analysed and interpreted according to the protocol for data analysis as will be discussed below.

2.11 Protocol for data analysis

After the collection of the data, a protocol drawn based on the guidelines proposed by **Strauss and Corbin, (1996: 62-69) and Weitzman and Milestone, (1995: 333)** is followed step-by-step as follows:

Step one: The researcher reads the transcripts once for a holistic view. The researcher puts all preconceived ideas aside.

Step two: The researcher reads the transcripts for the second time. The researcher also underlines relevant answers. This step involves a line-by-line analysis with the relevant and irrelevant phrases or words or terms distinguished. The researcher lists relevant responses in the language of respondents ("in vivo codes"). (See annexure B).

Step three: Labeling the phenomenon: This step entails the conceptualisation of data that entails the researcher giving of each discrete incident, ideas or event, a name.

Step four: Identification of categories: This refers to grouping ideas or labels that appear to belong together to the same phenomenon. The patterns or codes or themes developed have a theoretical power, that is, a theory of the study gradually emerges. In this study the categories discovered relate to the relevant responses to the interview questions as depicted

Step five: Description of categories. In this step, the essence is on giving a 'thick description' of each category as identified in step four. The density and saturation of categories directed the description of the categories. The theoretical analysis of each category will be subjected to a literature check after each description. (See Chapter 5).

2.12 Method of data analysis

Content analysis was used to analyse the transcripts

The interviews were analysed by the researcher and one independent decoder.

All three sets of respondents were willing to be interviewed in English and agreed on having the interview recorded. Confidentiality is ensured.

2.13 Summary

In this chapter the research strategy of the study is outlined. It briefly outlines the choice and rationale for the selection of a qualitative paradigm.

CHAPTER 3: DESCRIPTION OF DATA

Categories 1 and 2

3.1 Introduction

In this Chapter as well as in Chapter 4, the data, as retrieved from individual semi-structured interviews, will be discussed in detail. The data will be discussed in categories before being compared with literature and interpreted in Chapter 5.

Reference to needs and problems, (Category 3), are discussed in Chapter 4.

3.2 Analysis of data

Ten Individual semi-structured interviews were analysed according to the method of content-analysis of **Kerlinger, (1986).** Three kinds of interviews were conducted, namely 3 with lecturers, 3 with secretaries and 4 with employers (see par.2.14).

After the initial analysis twenty-two themes were identified. These themes are categorized into 3 categories where themes are grouped together into meaningful units and sub-themes.

The themes are grouped into categories as follows:

Category 1. Content and methodology of present courses.

Category 2. Present application of Telephone Etiquette.

Category 3. Needs and problems.

Categories 1 and 2 are discussed in Chapter 3, and Category 3 in Chapter 4.

(See fig. 3.1).

The information is separated into two chapters because of the volume of the data.

CATEGORIES

CATEGORY 1	CATEGORY 2	CATEGORY 3
CONTENT AND METHODOLOGY OF PRESENT COURSES	PRESENT APPLICATION OF TELEPHONE ETIQUETTE	NEEDS AND PROBLEMS CHAPTER 4
3.4.1 Content of present courses 3.4.1.1 Incoming calls 3.4.1.2 Dealing with calls when the manager is not available 3.4.1.3 Phrases not to be used 3.4.1.4 The abusive caller 3.4.1.5 If a caller should insist on speaking to the manager 3.4.2 Methodology of present courses 3.4.2.1 Transparencies 3.4.2.2 Role play/ simulation 3.4.2.3 Textbook 3.4.2.4 Lecturing 3.4.2.5 Study guides 3.4.2.6 Videos	3.5.1 Incoming calls 3.5.1.1 Time spent 3.5.1.2 Identification/ Introduction 3.5.1.3 Manager not available 3.5.1.4 Putting a caller on hold 3.5.1.5 Manager does not want to speak to the caller 3.5.1.6 Handling calls outside area of expertise 3.5.1.7 Handling callers who do not know what they want 3.5.1.8 Callers who cannot be heard 3.5.2 Outgoing calls	4.3.1 Needs regarding content 4.3.1.1 Cellular phones 4.3.1.2 Tele-sales 4.3.1.3 Answering machines 4.3.1.4 Language preference a) English b) Afrikaans and English c) English, Afrikaans and an additional official language 4.3.1.5 Language proficiency 4.3.1.5.1 Written communication 4.3.1.5.2 Verbal communication a) Voice b) Tone and Pitch c) Pronunciation d) Pauses and phrasing

3.4.3 Duration of training	3.5.3 Messages 3.5.4 Visitors 3.5.5 Language proficiency 3.5.6 Handling media 3.5.7 In-house training 3.5.7.1 Orientation 3.5.7.2 Additional training 3.5.8 Inclusion of telephone etiquette in all qualifications	e) Tempo f) Variation 4.3.1.6 E-Mail 4.3.1.7 Practical Application a) Role play b) Simulation c) Experiential Learning i) Inclusion in course ii) Level iii) Directive to employers iv) Duration v) Monitoring and feedback from employers 4.3.1.8 International alphabet 4.3.1.9 Interpersonal skills a) Listening skills b) Assertiveness c) Handling difficult customers d) Sexual harassment e) Smooth caller f) Emotion g) Customer service h) Attitude 4.3.1.10 Messages

		a) Message form b) Important information 4.3.2 Terminology 4.3.2.1 Course name a) Telephone management skills b) Telephone etiquette 4.3.3 Call centers 4.3.4 Phrases or words not to be used 4.3.4.1 Use of the word "hallo" 4.3.4.2 Other phrases not to be used 4.3.5 Different technique application Woman vs. Men 4.3.6 Training a) Media i) Transparencies ii) Video iii) Television iv) Observation v) Tapes b) Method c) Content d) Language laboratory

		e) Compulsory training i) All staff to be trained ii) All qualifications to include telephone etiquette f) Time spent on training 4.3.7 Introduction/ Identification when answering incoming calls 4.3.7.1 Company or personal name 4.3.7.2 Image 4.3.8 Important requirements with regard to telephone etiquette 4.3.9 Handling social calls

Fig. 3.1. Summary of categories and themes.

3.3 Discussion of data

Although data will be discussed according to the identified categories, some of the themes are interrelated. This will be indicated in the summative paragraphs.

3.4 Category 1: Content and methodology of present courses.

3.4.1 Content of present courses

Five sub-categories were identified (see fig. 3.1).

3.4.1.1 Incoming calls

On the question put to the respondent (L2: 3) on how students are taught to answer incoming calls the reply was:

"*We teach them to use the phrases is indicated in our manual and….*"

The reply from respondent (L3: 5) on the question how students should answer incoming calls, the following was indicated:

"*Well, if you work for a company the first thing you should do is that you should say the name of the company, and then also your name and then you must greet the person and ask whether you can assist them or not.*"

Finally, when respondent (L1: 3) was requested to give an example of how incoming calls should be answered the following was indicated:

" Schuma, Schuma enterprises. Good morning, can I help you?"

3.4.1.2 Dealing with calls when the manager is not available

Three respondents were questioned on the inclusion of handling telephone calls should the manager not be available. The following was indicated:

" *Unfortunately Mr. More is not available, may I take a message*" (L1: 4).

Respondent (L3: 8) answered as follows: "It is part of the syllabus and they are doing it."

Finally the following was indicated:

" *We just indicate they (students) say: 'Sorry, he is not in right now, can I take a message, or would you like to speak to someone else?"*

The question was then asked: "*And if the caller were to ask: "When will he be available?"*

The following was replied: "*Unless he has indicated how long he is going to be, we would indicate that he is not available and he did not indicate how long he is going to be. One cannot say he will be back in say, three hours, because if they were to phone again after three hours, he might still not be back*" (L2: 5).

3.4.1.3 Phrases not to be used

Two respondents indicated the following when questioned on the phrases students are taught not to use:

"Like saying 'nê', repeating yourself, and 'hello' and basically repetition, I ..." (L3: 4).

And: *"Do not say: who is calling, or who are you?*

It is rude.

Do not say the boss is in the gents, or in the loo.

If the boss is not in, do not say: He is not back from lunch yet" (L2: 3).

3.4.1.4 Dealing with the abusive caller

Three respondents were questioned on how the abusive caller should be handled.

The response was:

"Yes, they do that" (L3: 8).

And: *"We just tell them if someone is abusive, or upset, they should remain calm. They should try and identify the problem and try and solve it, and not to react to someone who is upset, because I know it is at times very easy to just let fly yourself"* (L2: 4).

Another respondent confirmed the above statement with a: *"Yes"* (L1: 4).

3.4.1.5 If a caller should insist on speaking to the manager

One respondent was requested to indicate how students are trained to deal with a caller who insists on speaking to the manager. The following was the reply:

"Well, he is not available, what else can one say?

We tell the students that they must say they are sorry, he is not available, can I take a message, and if it is that urgent, is there someone else that could help" (L2: 5).

3.4.2 Methodology of present courses

Three respondents were questioned on the methodology used in the training of Telephone Etiquette. Replies received are divided in six sub-themes as follows:

3.4.2.1 Transparencies

One respondent referred to the use of transparencies as follows:

"*First introduce the topic by means of transparencies ...*" (L1: 2).

3.4.2.2 Role play/simulation

Two respondents indicated that role-play/simulation was used in the training of Telephone Etiquette. The following was indicated:

"*No, normally we simulate an office whereby we have a receptionist, and then we have the manager at the back and we have a visitor here ...*" (L1: 4).

Respondent (L1: 4) also indicated the following:

"*We get an imitation phone and we imitate the ring ... and we pick it up and we start answering ... whether they apply the knowledge that they have learned.*"

The response from respondent (L3: 3) was:

"*No. We do not do practicals because we do not have the facilities.*"

As well as:

"I do that (role-play) *in Training* (not telephone etiquette) *unfortunately again it is not very successful ..."*

3.4.2.3 Textbook

Two respondents indicated that a textbook is used in the training of Telephone Etiquette.

Respondent (L2: 3) indicated:

"... and the text book ... "

And: *"It is the N4 text book"* (L3: 8).

It was also indicated further (L3: 9): *"They use only the text book ... Therefore, the more information that is in the text book, the better for the student and lecturer."*

Respondent (L1: 5) referred to using: *"Prescribed books and also books from the library"*.

3.4.2.4 Lecturing

From the respondent's answers it is clear that the traditional method of lecturing is still used, for example, *"No. We do not do any practicals because we do not have the facilities" (L3: 3).*

On the use of, for example, tapes being used in the training of students, the response from respondent (L2: 2) was:

"No, mainly because we have so many students."

In reply to the question whether training received on Telephone Etiquette was done in theory, practically or both, respondent (S1: 2) replied:

"Mostly theory."

According to this respondent no role-play was applied either.

3.4.2.5 Study guides/manual

One respondent referred to the use of a study guide or manual. The following was indicated:

"*We only use videos and the manual.*"

And: "*The students would use the Business Admin. I manual*" (L2: 6).

3.4.2.6 Videos

Two respondents indicated that videos were used in the training of Telephone Etiquette. The following was indicated:

"*We have books and videos*" (L1: 5).

And: "*... then also a couple of videos, for example the Siemans Analog ..., the Three Way Conferences etc. and the video "When I'm calling you."*"

As well as: "*Yes, I have a video that deals with cell phones.*"

'Does' ..." *No, it is basically just what the cell phone consists of and the functions that can be performed.*

It covers a very small portion of etiquette" (L2: 6).

3.4.3 Duration of training

Questioned on the duration of training on Telephone Etiquette the following information was obtained from three respondents:

"*For to five weeks*" (L1: 2).

And:

"*In Business Administration I, we cover it over three weeks, we see the students for four periods a week, each period being 40 minutes*" (L2: 2).

Finally: "*If ... When I taught Office Practice or Communication, usually telephone etiquette is only part of a module or a chapter, but fortunately that has changed. I ... to spend in theory and discussion, say two weeks ...could be between five or ten hours for the two weeks ...*" (L3: 3).

3.5 Category 2: Present application of Telephone Etiquette

3.5.1 Incoming calls

On the question of incoming calls, two themes were identified.

3.5.1.1 Time spent

On a question on the time spent on taking incoming calls the following was indicated:

Respondent (L2: 1)

"*The same* – 50%."

Other respondents indicated:

"70%" (S3: 2).

"*About 70%* (S1: 1).

"*About 70%* (S2: 1).

"*More than 50% of the day*" (L1: 1).

3.5.1.2 Identification/Introduction

On the introduction used when answering incoming calls, the following was indicated:

"*I had two lines – on my boss's telephone I would say: Dr. Stuarts office. How may I help you?*

And on my line I would say: Glenda speaking, how may I help you?" (L2: 1).

And: "*Normally when we do role play they* (students*) would say*:

Schuma, Schuma enterprises. Good morning, can I help you" (L1: 3).

Finally: "*Well, if you work for a company the first thing you should do is that you should say the name of the company, and then also your name and then you must greet the person and ask whether you can assist them or not. So not very fast, you should do it slowly, even if you do it a hundred times over and over, if you are the receptionist*" (L3: 5).

3.5.1.3 Manager not being available

Five respondents were questioned on how to deal with the situation where the manager is not available to take a call. The following was indicated:

"... Mr. so-and-so is not here without offering an alternative like: could I take a message, or I expect him back after three o'clock, or offer any alternative".

On using the phrase: "*He is not available*" the same respondent indicated the following:

"Why is he not available? Is he just not taking calls? Is he not taking calls because he is sick in hospital? It might be a situation where if you can't speak to him, you could speak to one of his associates, but now you don't know. You're waiting to call him later, just to find out that he is actually on leave for the next week" (E2: 9).

Respondent (S1: 4) responded as follows:

"He is not in the office at the moment, can I take the message?

Or, He will be available at such a time and you may call him back then."

3.5.1.4 Putting a caller on hold

Three respondents were questioned on the handling of calls that need to be transferred. Four sub-themes were referred to, i.e:

a) Introduction

Respondents were requested to indicate what is said when a caller is to be transferred. The following was indicated:

"*Will you please hold for Mr. Mosia, he is still busy on the other line*" (S1: 4).

Respondent (S2: 3) indicated the following:

"*Could you hold the line, I'll put you through, or*

Just hold for her, she is busy."

Lastly:

"*I always tell them I am putting you through to so-and-so or to accounts department*" (S3: 5).

b) Indicating who the call is being put through to

On the question whether an indication is given to whom the calls are being transferred to, the respondents indicated as follows:

"*Yes, you are going through to Mr. Mosia*" (S1: 4).

"*Not always. Depending if it is a friend, I would just transfer.*

Other times I would" (S2: 3).

And: "*I mention either the person, or the department or the position*" (S3: 5).

c) Length of time a caller is kept on hold

On the accepted length of time a caller should be kept on hold the following was indicated:

"*About two to three minutes*" (E1: 4).

"*Not too long. We have an automatic system that reverts the call back*" (S2: 3)

And:

"*Well it depends, but I would prefer ten seconds.*"

On the question whether an automatic reverse system was used and how long it takes, the reply was:

"*Yes.*"

"*Yes I did, it is twenty seconds*" (S3: 5).

d) What is said when returning to the caller

When asked what is said when returning to the caller, before transferring the call, the following was replied:

"*Thank you for holding. You are going through now*" (S1: 4).

And: "*I'm sorry the person you are holding for is busy, would you like to hold or can I take a message*?" (S2: 3).

And further: "*You must always tell him, give reasons why he is still holding. You would rather say the line is still busy or he is on his way going back to the office, or something, you must tell the truth.*" (S3: 5).

In closing, respondent (E1: 3) made the following comment:

"*There is nothing more irritating as having to wait to be transferred and the person does not come back to say what is happening. You either have to sit and listen to the irritating music played over and over, or eventually you ring off, because nothing is happening. This is one of the biggest time wasters.*"

3.5.1.5 When the manager does not want to speak to the caller

Four respondents were questioned on how callers, the manager does not wish to speak to, should be handled. The following responses were offered:

"*Firstly, I try to find out from the person what it is that he wants, and may be it might not even be the right department. So I try to get the story and from there I transfer him. If not, I try to take the story and promise to phone back*" (S1: 5).

And:

"*I will still be polite and humble, and I would deal with him, and I would never even show that my boss does not want to take the call. That is where you need to be very tactful*" (S3: 6).

3.5.1.6 Handling calls outside area of expertise

Three respondents were asked to comment on how to handle callers when information received is outside their area of expertise. The following was indicated:

"*I try to transfer them to who ever, my senior, who would help them*" (S1: 5).

And: "*If it is something I cannot handle, and ... and the person who can handle it is available, I would tell the person at the other end that I am sorry but I am not qualified to help him, could I please put them through to someone who is*" (S2: 4).

3.5.1.7 Dealing with callers who do not know what they want

Here too, three respondents were questioned on how to deal with callers who do not know what they want. The following was indicated:

"*We get them every day.*

You have to be polite to them. You ... You need to let them know to what they want"

(S3: 6).

And: "*I try to find out what they want from what they are saying. I try to detect what it is they want and put them through to the relevant person*" (S1: 5).

3.5.1.8 Dealing with callers who cannot be heard

Two respondents were requested to indicate what should be said if a caller cannot be heard. The response was:

"*Well ... Excuse me but can you raise your voice a bit, my phone is faint, I cannot hear you properly*" (S3: 7).

And: " *By telling him, asking him to speak a bit louder.*

Unfortunately I cannot hear you, will you please speak a bit louder" (S1: 5).

3.5.2 Outgoing calls

Six respondents were asked to react to a question regarding the time spent on outgoing calls as well as whether outgoing calls are made on behalf of the manager.

The response was:

The secretary to respondent (E1: 2) does not make outgoing calls on his behalf because:

"*I feel she has enough to do. I prefer doing it myself.*"

From respondent (S3: 2), the following responses on the question for whom outgoing calls were made: "*For my boss who is the chief of "PARTY" and the deputy chief of PARTY.*"

And finally the following response on the question whether outgoing calls were made:

"*Yes. Nearly all his calls.*

He instructs me who to call. I dial the number, get the person on the line and put the call through to him" (S1: 1).

3.5.3 Messages

Ten respondents were questioned on the taking down of messages as well as in what form messages are taken. All respondents stressed the importance of taking down messages correctly.

Respondent (E2: 7) was questioned on whether applicants were tested on their ability to take down messages. On replying "*unfortunately not*", the respondent was questioned on why "unfortunately not." The following was replied:

"*Because it poses a very big problem.*" And further on: "*One of the problems was message taking. They would not put a date, or a time ... Message taking can be a big frustration, if it is not done correctly... And ... the first complaint is: 'she does not know* *how to take messages, she never puts the time on, she never takes surnames, she never takes numbers, ...' Do you know how much time you waste by having to figure out what this message means.*"

3.5.4 Visitors

Two respondents were asked whether a telephone call has precedence over a visitor coming into the office. From respondent (S3: 7) the reply was:

"*I would just offer you a seat while I am answering the phone.*"

Respondent (S1: 6) indicated: "*I tell the visitor I have to answer the phone.*"

3.5.5 Language proficiency

Eight respondents were questioned on the importance of language proficiency in the handling of the telephone. The following was forthcoming:

"*The basic problem with the students is their second language English, is not very good and that is why they make so many mistakes when speaking on the telephone.*

I am sure if they were to answer in their own language they would be fine" (L2: 3).

The following comment from respondent (E3: 3).

"*I would say, 70% of our sales yes. There are certain clients who demand to speak Afrikaans, or demands to speak English, or he can only speak English, so if you can't speak the language, you are not going to sell.*"

And finally:

"It is important really. Because if we cannot communicate we will not be able to conduct any business" (L1: 3).

3.5.6 Handling media

Four respondents were questioned on the present use of media in the training of Telephone Etiquette. The media used was referred to as:

"*We only use videos and …* (L2: 3),

and: "*First introduce the topic by means of transparencies …*" (L1: 2),

and on the questioned asked to respondent (S1: 2) on what her opinion was on how the training should be done, the reply was:

" *By means of … tapes, video. And practically use the telephone*."

3.5.7 In-house training

Eight respondents were questioned on making use of either in-house – or additional training in Telephone Etiquette.

Four respondents indicated that the companies they work for did not have in-house training and were also not sent for any additional training on Telephone Etiquette.

(L2: 1, S2: 3, E1: 2, and S3: 4), who indicated that she had not received additional training because: "*They are satisfied with me*."

The following two aspects were identified:

3.5.7.1 *Orientation*

One respondent referred to receiving in-house training on Telephone Etiquette during orientation (L1: 2).

3.5.7.2 *Additional training*

One respondent (S1: 3) indicated that additional training on Telephone Etiquette was received. When questioned on the value thereof the answer was:

" Yes, definitely.

The facilitator made use of tapes, taping our voices and indicating what was done wrong."

Finally, two respondents, (E2: 2 and E4: 4) indicated the following with regard to the question on either in-house training or additional training on Telephone Etiquette.

"So we do acknowledge that there is a great need for training of these people (call centers) and there certainly are some companies that are up to date with their training facilities but there is a very big lack of training skills on the call center side" (E2: 2).

And: *"No, we do have our own internal people within Spoornet, if ...when I sent my people asking for telephone training, I went to a private firm, ...* " (E4: 4).

3.5.8 Inclusion of Telephone Etiquette in all qualifications

Three respondents, (L1: 6, L2: 2 and L3: 3), were questioned on the importance of the inclusion of Telephone Etiquette in all qualifications. All three the respondents were of the opinion that it should be included, because:

It (telephone etiquette*) is for keeps, it... even with the cell. phone, is still an important component of our life* (L1: 6).

And: "... *because every one is going to be in industry and will have to use the telephone*" (L2: 2).

3.6 Summary

In this chapter the content and methodology of the present courses as well as the present application of Telephone Etiquette were discussed as indicated in Fig. 3.1.

In the following chapter, Chapter 4, the needs and problems with regard to Telephone Etiquette is to be discussed as indicated in Fig. 3.1 and Fig.4.1, Category 3.

CHAPTER 4: NEEDS AND PROBLEMS

Category 3

4.1 Introduction

This chapter is a continuation of Chapter 3. The needs and problems with regard to Telephone Etiquette are described. In summary, a task analysis is given to determine the present focus and development of needs and problems of Telephone Etiquette as a micro-curriculum.

Nine sub-categories were identified (see Fig.3.1 and 4.1).

CATEGORY 3	
NEEDS AND PROBLEMS **CHAPTER 4**	
4.3.1 Needs regarding content 4.3.1.1 Cellular phones 4.3.1.2 Tele-sales 4.3.1.3 Answering machines 4.3.1.4 Language preference a) English b) Afrikaans and English c) English, Afrikaans and an additional official language 4.3.1.5 Language preference 4.3.1.5.1 Written communication 4.3.1.5.2 Verbal communication a) Voice b) Tone and pitch c) Pronunciation d) Pauses and phrasing e) Tempo f) Variation 4.3.1.6 E-Mail	4.3.1.7 Practical Application a) Role play b) Simulation c) Experiential Learning i) Inclusion in course ii) Level iii) Directive to employers iv) Duration v) Monitoring and feedback from employers 4.3.1.8 International alphabet 4.3.1.9 Interpersonal skills a) Listening skills b) Assertiveness c) Handling difficult customers d) Sexual harassment e) Smooth caller f) Emotion g) Customer service h) Attitude 4.3.1.10 Messages a) Message form b) Important information

4.3.2 Terminology 4.3.2.1 Course name a) Telephone management skills b) Telephone etiquette 4.3.3 Call centers 4.3.4 Phrases or words not to be used 4.3.4.1 Use of the word "hallo" 4.3.4.2 Other phrases not to be used 4.3.5 Different technique application Women vs. Men 4.3.6 Training a) Media i) Transparencies ii) Video iii) Television iv) Observation v) Tapes b) Method	c) Content d) Language laboratory e) Compulsory training f) Time spent on training 1) All staff to be trained on telephone techniques 2) All qualifications to include telephone techniques 4.3.7 Introduction/Identification when answering incoming calls 4.3.7.1 Company or personal name 4.3.7.2 Image 4.3.8 Important requirements with regard to telephone etiquette 4.3.9 Handling social calls

Figure 4.1

(Figure 4.1 is a repetition of Fig. 3.1)

4.2 Analysis of data

In this category 9 themes were identified.

4.3 Discussion of data

Some of the themes discussed are interrelated to that discussed in Categories 1 and 2 in Chapter 3. This will be identified in the summative paragraph.

4.3.1 Needs regarding content

Ten needs regarding content were identified and should be included in a module on Telephone Etiquette (see Fig. 3.1 and Fig 4.1).

4.3.1.1 Cell-phones

Of the 3 respondents asked on the use of cellular phones, all 3 indicated that there is a need that all office staff should be competent in the usage of a cell-phone:
"...is very important, because a lot of, especially your high profile business people, and you know, if you have a industry that generates a lot of activity ...." (E2: 11). This respondent indicated further: "... *It is very important ... you get so many makes of cellular phones, ... There really is a need for that."* (E2: 11).

Another respondent was of the opinion that: *"After hour calls should be diverted to personal cellular phones"* (E1: 3).

Respondent E4 is of the opinion that: *"... all the staff get a chance to use cell-phones, because it is an extension of hours that one uses the cellular phone for"* (E4: 9).

4.3.1.2 Tele-sales

Six respondents were questioned on the inclusion of the use of tele-sales in training and the importance thereof. One respondent received training. Two of the respondents indicated that they had not received training on the use of tele-sales, while three indicated that tele-sales is not part of the present training. On the need thereof the following:

"I think that all of the above that we have referred to, is important because there are many opportunities lately, which earlier on you did not find. It is part of big business and then they also advertise positions on that, so I think that is totally a division on its own" (L3: 7).

And further: *" Ja, I was working, what you call an evening work. That is when I used that"*... (S3: 4).

4.3.1.3 Answering machines

Six respondents were questioned on the use of and/or importance of answering machines with regard to the training in Telephone Etiquette. One respondent had received training. On the question of the inclusion of this in the training, two respondents indicated that it was not included. One respondent's answer was: "*No, we briefly explain the working of the answering machine and that is it*" (L 3: 7).

With regard to this the following:

"*Answering machines are briefly covered in the manual, what it is, and how to leave a message and we also discuss with the student do they leave messages or not. The majority say they do not, because they do not like talking to a machine. We therefore reiterate how important answering machines are and that is the reason why it is used*" (L2: 4).

And: "*A lot of times people just leave a name and number on the answering service. They should be trained to convey, in one sentence, the purpose of the call, because the person on the other side, listening to the message at a later stage knows how to prioritise, this is something that is extremely urgent and important, and the next thing is a call I could return on my way home*" (E2: 11).

4.3.1.4 Language preference

With regard to language preference, three needs were identified. English, Afrikaans and any of the other official languages. Ten respondents were questioned on the use of language preference of which 7 were in favour of English, 2 two in favour of English and Afrikaans while two were in favour of the inclusion of one of the other official languages.

a) English

With reference to English, the respondents indicated the following:

"*We operate in the Pretoria market only, and Pretoria which is seen as the more conservative city, they are adamant that they should be English, or know English very well. Even the Afrikaans applicant will be tested on how well she speaks English. Even for the affirmative action positions the main requirement is always that they should speak English*" (E2: 5).

And: "*I think, English is the state language, and that would be my first priority when I look at somebody in this business*" (E4: 2).

b) English and Afrikaans

With reference to being bilingual, i.e. English and Afrikaans, the respondents indicated the following:

"*We prefer that they must be bilingual. Afrikaans and English*" (E1: 1).

On the question put to respondent (L1: 3), on what language students were trained in, the reply was: "*English and Afrikaans. And their mother tongue comes naturally.*"

c) English, Afrikaans and an additional official language.

The respondents that were in favour of an additional language responded as follows: "*If you just look at Afrikaans speaking people, sometimes misinterpreting what an English person actually means, regardless of what he hears and saying, and even more so with all the other official languages. That has been identified as a big problem*" (E2: 3).

Respondent (S1: 2) responded as follows: *"English, Afrikaans and one other African language. The language used in the area that you work."*

4.3.1.5 Language proficiency

Two aspects related to language proficiency were indicated, i.e:

4.3.1.5.1 Written communication

All respondents were positive when asked on the inclusion of language proficiency in the training of Telephone Etiquette. Many aspects of communication in general, were referred to as being important. Of the responses given, are:

"*Office Techniques is based on language*" (S3: 3).

"*It is important. Because if we can not communicate we will not be able to conduct any business*" (L1: 3).

"*Very important. You must be able to express yourself*" (S1: 2).

" ... *phrasing is important when answering the telephone and first impressions are also important so your phrasing should be right*" (S2: 2).

"*Well if you do not know how to express yourself, it makes it difficult for the other person to understand you, it takes a lot of time, it wastes time, and time is money*" (L3: 6).

Written communication also influences the taking of messages (see par. 4.3.1.10).

4.3.1.5.2 Verbal communication

Verbal communication, for the purpose of this study, refers to the following:

a) Voice

The voice is indicated as being important because:

"*We can't rely on facial expression, eye contact or body language.*

The very first thing our clients are confronted with, is a voice.

The nature of this voice triggers instinctive positive, negative or neutral feelings.

The first thing you have to ask yourself: are there any aspects of the voice that may lead to complications or unwanted response result as far as client's understanding of our policy, is the impression of us" (E3: 1).

And: "... *I think once voice manner at the end of the day, if it sounds like you are not interested, in what he is saying, people pick it up straight away, so you must be very accommodative and have empathy, and that must be part of your voice*" (E4: 6).

Further aspects with regard to verbal communication is:

b) Tone and pitch

Tone and pitch refers to: "*That which makes a voice high or low, smooth or shrill*" (E3: 2).

c) Pronunciation

Pronunciation refers to: "*Correct way of saying* words" (E3: 2).

d) Pauses and phrasing

(E3: 2) refers to pauses and phrases as: "*That which creates the sense and logic in verbal communication.*"

e) Tempo

Referred to as: "*Speed of verbal communication*" (S3: 2).

f) Variation

As quoted by (S3: 2), variation refers to that: "*Which brings life to the spoken word.*"

4.3.1.6 *E-Mail*

Of the 8 respondents asked whether E-mail could influence the amount of incoming and outgoing calls, five were of the opinion that it will not, while 3 indicated that it will not immediately, but would in future, affect the amount of calls handled.

The response from some of the respondents were:

"*... but personally, no, I don't think so. Because ... the feedback is delayed, and two-way communication will always be important ...*" (L3: 9).

And: "*I don't think so. I think telephone is the easiest thing that you can do. With E-mail you still have to sit down and type the message*" (S1: 6).

One respondent is of the opinion that there is space for both. He replied: "*I think there is space for E-mail and a space for ... can you imagine dealing with a problem client over* *the E-mail. How many times are we going to communicate with each other till we understand. So I don't think e-mail will ever replace the telephone*" (E4: 9).

Lastly: "*Yes I do. E-mail is also a new area where skills can be developed, because although it is an informal way of communication, one still needs to be polite when replying to ensure that you answer exactly what the client wants from you. So language is still important*" (E1: 3).

4.3.1.7 Practical application

To be able to determine the importance of the practical application in the training of Telephone Etiquette, respondents were required to give their opinion on the following three aspects:

a) Role-play

All respondents questioned were in favour of role-play in the training of Telephone Etiquette:

"*We also use, in that course, extensive role-play situations*" (E4: 5).

Also: "*Role-playing definitely is part of it and then demonstration and then active participation, but you must put them (students) in that position and not just pretending; they must understand the responsibility about it*" (L3: 4).

Three respondents indicated that role-play was not used. (S1: 2, S3: 2 and L2: 3).

"*In the class room they do not have the practical experience, apart from the telephone they are using, ...*" (L3: 3).

b) Simulation

One respondent referred to simulation used in the training situation:

"No, we normally simulate an office whereby we have a receptionist, and then we have the manager at the back and we have a visitor and we have a caller on the line and we see how she handles the two situations whereby she has a visitor here and then the manager on the other hand and also the telephone ringing ..." (L1: 4).

c) Experiential learning

Three respondents were questioned on the inclusion of experiential learning in the qualification offered. Five sub-themes were identified as follows:

i) Inclusion in the course

Two of the respondents questioned indicated that experiential learning is included in the course offered.

One respondent indicated that: *"Yes, they should, but basically they only do it through case studies"* (L3: 8).

ii) Level

Two respondents indicated that experiential learning is done during the third level of study.

iii) Directive to employers

One respondent was positive that, directives regarding Telephone Etiquette are given to employers, when experiential learning is conducted.

iv) Duration

With regards to the time spent on experiential learning the following was indicated:

"Nine weeks" (L1: 4).

"Six months" (L2: 5).

v) Monitoring and feedback from employers

Two respondents indicated that monitoring is done. With reference to the feedback from employers on student's handling of the telephone, the following:

"Average. The most employers would expect them to communicate in Afrikaans, which we do not offer here" (L1: 5).

And: *"Not good.*

Definitely not good.

That they do not know how to speak on the telephone. And not only the basic things, it is also like if there is a crisis, they really just do not know how to cope with it, or handle it. They are not too sure what to do at all" (L2: 6).

4.3.1.8 International alphabet

Six respondents were questioned on either the use of, or the inclusion of the international voice alphabet in the training. Of the 6 respondents, one indicated that it was used:

"That is what I do, that is what I do" (S3: 3).

4.3.1.9 Interpersonal skills

Eight sub-themes were identified as follows:

a) Listening skills

Ten respondents were questioned on the importance of listening skills. All ten indicated the importance thereof. The following was the response:

"It is yes" (S3: 3).

"Because once you miss a number, you obtain the wrong information.

"You need to listen very carefully to hear what the caller requires. If you do not listen you might give wrong information" (S1: 3).

And: *"Definitely, even more than just good telephone manners because a lot of people ... Listening also plays a very important role; it is not just the talking"* (L3: 7).

And finally: *"Listening skills is of vital importance. In the sales environment, one of the key elements will be to determine the emotional and practical need of the client. Can only be determined by listening to the client, if you don't listen to the client, if you don't listen, you obviously won't sell a policy, that's a fact. So listening skills, vitally important"* (E3: 3).

b) Assertiveness

Four respondents were questioned on being assertive on the telephone. Three respondents were in favour of being assertive. The following was indicated:

"You have to be assertive at times, especially when you are on a switchboard, and other calls come through ..." (S2: 5).

"I think one should be at times. Especially in my line of work where you have to deal with students. They tend to take advantage and say what they want" (S1: 5).

c) Handling difficult customers

Two respondents came out clearly on the importance of knowing how to deal with the difficult or irate customer. The following was indicated:

"I think that is one of the major areas. Once you have given a person a chance to talk, they usually feel a little better, because they have blown off. I think the wonderful thing one learns on irate or upset customers is once you have won an upset customer, he is a friend for life, a normal customer is not normally a friend, he could be upset tomorrow, ..." (E4: 6).

And: "... person who really has to pacify the irate customer. So it is very much about the communication skills of your call center operators" (E2: 2).

d) Sexual harassment

Three respondents were questioned on sexual harassment over the telephone.

Two indicated that students are not trained to deal with it over the telephone, while one respondent indicated the following:

"There is only a few sentences in the text book, but it is important that they should do that as well" (L3: 8).

e) Smooth caller

Here too three respondents were questioned on which two indicated that it was not covered in the training, while one indicated:

"Ja, we also do that, but is basically just a discussion" (L3: 8).

f) Emotion

Four respondents were questioned on the influence of moods on telephone handling.

Three indicated that ones mood does affect the way the telephone is handled, and indicated as follows:

"Yes, it should be, but it is not supposed to be like that. Never allow yourself to bring your moods to the office" (S3: 6).

Further: *"Sometimes, yes. Why...*

The person at the other end hears your voice tone and if you are tired or slightly irritable, they do pick it up. I would ..." (S2: 4).

And: *"You dare not have an operator that comes across abrupt or disinterested, they are really people that never may have personal problems that they bring to work"* (E2: 2).

So we deal with customers it is very important to us" (S2: 3).

g) Customer service

Four respondents were questioned on the importance of customer service on the telephone. All four indicated that it is important and replied as follows:

"You know I think for business to survive we do need the customers, so we need to make them feel welcomed. We should give them the best service. They should be the number one priority" (S1: 4).

And: "*Because we deal with customers, it is important to us*" (S2: 3).

And lastly: "*It is very important. Because the moment you answer the phone people know what kind of company they are dealing with. So the company is like in our hands. So ... So it really matters very much*" (S3: 4).

h) Attitude

With regard to attitude on the phone the following was indicated:

"*Also maybe their attitude could be changed* ..." (L2: 6).

And: "*They* (employees*) always have to have the same attitude, the mental fitness every day*, ..." (E2: 2).

4.3.1.10 Messages

All respondents were questioned on the importance of taking messages, the use of a message form and important information needed.

a) The message form

Seven respondents indicated that a message form is used. One respondent indicated when asked if the message pad is used, that:

"*No not always. I think one gets to know your boss. I write it on "post it" note pads. and I put it on his table*" (S1: 4).

And: "*We do have a message pad that we require them to complete*" (L1: 3).

Also: "*Well we basically teach them how to draft their own message form if they do not have an appropriate message form available*" (L3: 6).

Two respondents indicated the use of a book in which the messages are recorded.

One respondent indicated that messages are, after hours, taken electronically by an answering machine, because: "*We only look at messages after hours, we have, our* *phones go over to cell-phones for another few hours to also cover other countries like England and America*" (E4: 3).

b) Information required

With regard to the information required regarding the successful completion of message taking one respondent indicated the following:

"*Message taking can be a big frustration, if it is not done correctly.*

Do you know how much time you waste by having to figure out what this message means?" (E3: 7).

Respondents indicated the following as being important information required to complete a message.

"*No, not just the first name, but also the surname, because it could be possible that there is more than one person in that department or the company with the same name. The date is important then also the topic and the message itself*" (L3: 6).

"*They don't have the whole story, they will just have little bits and pieces of the message, and they may forget to say how urgent the message is. They also forget to put the time down*" (L2: 4).

And: "*They often forget to take the telephone numbers, the codes, then sometimes they forget the company or the firm they are taking this call from, and in connection with what*" (L3: 6).

4.3.2 Terminology

Nine respondents were questioned on an appropriate title for a course or module in Telephone Etiquette.

4.3.2.1 Course name

Different views were expressed with regard to a name for a course or module in telephone training.

These were:

a) Telephone Management Skills

"*Telephone Management Skills ... because Telephone Management Skills define what the management of the telephone is.*

Telephone management can mean anything, but managing your skills is better.

Skills also meaning something you can train for" (S2: 5).

And:

"*That would be fine.*

I think, speaking on the telephone is a skill. You don't just automatically know how to speak on the telephone. So you will have to learn it. So... So one could be trained in it" (L2: 7).

As well as: "*Definitely not just skills, definitely not just techniques, definitely not just management, it should be something of everything, a little bit of everything, like, good* *telephone etiquette or telephone management, or etiquette in telephone management, or excellent telephone management, ...*" (L3: 9).

Further:

"*... but if you say management, it includes managing your voice, your language and messages*" (L1: 6).

b) Telephone Etiquette

One respondent preferred the term "Telephone Etiquette" (E1: 3).

The other respondent indicated the following when asked what is preferred, the term "skills or techniques":

"*Yes, the techniques. To me it also indicates that there could be different applications of the skills*" (E2: 12).

Finally:

"*By answering the phone, taking calls for your boss, messages etc., you are actually managing*" (S1: 6).

4.3.3 Call centers

According to one respondent (E2: 1) call centers are becoming more important in South Africa. Thus: "*Call centers being the buss word in the market at the present moment. Call centers have given a totally new concept, brought a whole new concept into your telephone operator and your receptionist type of position.*"

With reference to specific requirements for the call centers the following:

"And ... would normally be personality and communication skills," as well as: *"of course also the listening skills. That is part of the communication skills ... "*

4.3.4 <u>Phrases or words not to be used</u>

Eight respondents were questioned on phrases and or words that they considered should not be used.

4.3.4.1 Use of the word "hallo"

Seven of the respondents indicated that the use of the word "hallo," was not acceptable. The reasons being:

"It sounds unprofessional, also it could be offensive to the caller. Especially, when you are not well acquainted with the caller" (S2: 1).

Also: *"Because it is unprofessional or unethical, if I may use a stronger word"* (L1: 3).

And lastly: *"I think that what you say on the telephone projects the image of your employer.*

You should give a good impression of your company" (S1: 2).

4.3.4.2 Other phrases not to be used

Other phrases quoted by respondents are inter alia:

"Hi, Skattie, How-zit, Ta-Ta" (S2: 1).

With reference to these words, the following:

"*That happens a lot. You know, the workplace is becoming less informal, ... you have your clients that used to be Mr. Jonker or Mr. so-and-so, that now says:*

Nee man, call me Piet. They become quite offended if you don't call him Piet.

But I personally still feel that it is still the work place ...

I really do not think there is place for that in the work place. I ... even though the work place is becoming more informal" (E2: 10).

"*Do not say: who is calling, or who are you.*

It is rude.

Do not say: the boss is in the gents, or in the loo.

If the boss is not in, do not say: " he is not back from lunch yet" (L2: 3).

"*... and saying: What you want, because we get people who are not sure what number they are dialing. So they are like struck and it is not on to say: What you want. Why are you calling here? Or, I can't do that. No it is not acceptable to do that"* (S3: 2).

4.3.5 Different technique application

Women versus men

Two respondents were requested to indicate if there were differences in approach by women and men when dealing with matters on the telephone. The response was the following:

"*Men are usually more abrupt and technical and informative, but unfriendly. While women, unfortunately tend to talk too much*" (L3: 10).

And: "*Women are predominantly ... more tolerant. They don't come across abrupt as easily as men. A man could be putting on his nicest telephone voice and still come across abrupt. Men are not tolerant.*

Also if I could add there, also men are also different in problem solving abilities over the phone.

Women are more prepared to resolve problems over the phone than men.

Women are more relaxed or more willing to use the telephone to sort problems and differences, where men are not. They use the telephone as method to get you to set up a meeting" (E2: 11).

4.3.6 Training

Five sub-themes were identified with reference to the training of students in Telephone Etiquette. These are:

a) Media

With regard to the following 5 sub-themes were indicated,

i) Transparencies

One respondent referred to the use of transparencies in the training of Telephone Etiquette, and said the following: "*First introduce the topic by means of transparencies and then we do role play*" (L1: 2).

ii) Video

One respondent indicated the following with regard to videos used in the training of students: " ... *and showing videos that we have in the library*" (L1: 2).

Another respondent indicated the following with regard to the use of videos specifically related to the use of cellular phones: "*Yes I have a video that deals with cell-phones*" (L2: 4).

iii) Television

With regard to the inclusion of television in the training of Telephone Etiquette it was indicated by respondent (L1: 2), that it was not used in class, but referred to it as follows: "*For example I would say to them that yesterday on this program, did you see it, and they would say yes, then did you see so-and so answering the telephone. Then we identify what it is she did wrong and what she did right.*"

iv) Observation

The reference made by (L1: 2) above, with regard to the use of the television, could also apply to the application of observation in the training of Telephone Etiquette.

Further reference with regard to observation was indicated by (L3: 4) as follows: "*I think it could be a good thing if it possible at Colleges that you could sometimes, especially on a N6 level, some of the students part time, take them to the office, and say, once a week, or an afternoon that they should be in the office, part of the reception, answering the phone and know what to do when you put through calls ...*"

v) Tapes

The following question was put to respondent (L2: 2) "*Do you make use of tapes for example to tape student's voices?*" The reply was: "*No, mainly because we have so many students. We have 150 first year students, so it is quite impossible to do it with each one ...*"

b) Method

The respondents referred to different methods of training. The following was indicated when asked which text book was used: "*It is the N4 book*" (L3: 8).

Also with reference to text books the following: "*... and the text book by Ms S.M. Steenekamp*" (L2: 3).

Other methods also used were: "*We only use videos and the manual, but you could also use role-play and also using the telephone instrument, phoning a company and obtaining information from them*" (L2: 3).

And: "*The students would use the Business Admin. I manual, where there is a chapter on telephone techniques ...*" (L2: 6).

Finally: "*During this time they watch a video on answering the telephone and we will go through the theory with them, we also have exercises at the back of the book, for example, how to take down a telephone message*" (L2: 2).

c) Content

When asked what study guides, text book or notes students were using,

Respondent (L3: 9) answered as follows: "*They use only the text book I referred to previously (see paragraph b), method)*"

Because of the number of students in the class lecturers do not have the time to refer to other sources.

Therefore, the more information that is in the text book, the better for the lecturer and the student" (L3: 9).

d) Language laboratory

Three respondents (L1, L2 and L3) were questioned on the availability and/or use of a language, or other laboratory that could be used in the training of Telephone Etiquette. The respondents' replied as follows:

"*No, unfortunately not. I think a lot of students also see that* as a threat. *So*..., I *don't know, I haven't done that before but I doubt whether that will be successful*" (L3: 4).

From lecturer (L2: 6) the response was: "*I do not know.*" And finally:

On the question whether the institution has a language laboratory the answer was:

"*Yes.*" Whether it was used in the training the response was: "*It is suppositively to be so. I have not followed this up. I have not asked the students as to whether they do*" (L1: 5).

e) Compulsory training

The aspect of compulsory training is divided into two sub-themes as follows:

i) All staff be trained

On the importance of all staff, in industry, being trained on Telephone Etiquette, the following was indicated:

" *We ... and in these branches the telephones are manned by what we call 'higher desk clerks' and I think there is sometimes a problem in the way they answer calls. There is a lack of professionalism in the way they talk to the public.*

There certainly is room for improvement" (E1: 3).

And: "*Yes, I definitely think so, because often in business you find somebody at the other end that is really breaking down the business.*

You need to enhance the image of your firm" (S2: 5).

And lastly: *"It ... that had a call center fall flat on their faces, because of not training the people. They used operational staff ... these people had the product knowledge but they did not have the telephone skills and communication skills and they could not communicate what they knew to whoever was on the other side of the line"* (E2: 2).

ii) All qualifications to include Telephone Etiquette

Three respondents were questioned on the inclusion of Telephone Etiquette in all qualifications (programs) offered.

The following was indicated firstly:

"Yes, definitely. Because if I think of this College then we also offer courses in Engineering Study and then the technical side of the workshops and they are all of them definitely will answer the phone or take a message or communicate with the outside world ... I think it should be compulsory ... " (L3: 3).

Secondly: *I would think so, yes.*

Because everyone is going to be in industry and will have to use the telephone.

Therefore everyone should be trained, whether an office clerk or not" (L2: 2).

And finally the following: "*Yes. Because with each and every position you hold, you are going to be handling telephones.*

People are going to phone to make appointments, to make enquiries, and to make business with you, so you really have to have good telephone etiquette" (L1: 2).

f) Time spent on training

Respondents L1, L2 and L3 were asked to indicate the time spent on the training of Telephone Etiquette. These respondents answered as follows:

Respondent (L1: 2) indicated:

"*Four to five weeks.*"

Respondent (L2: 2) indicated: "*In Business Administration I, we cover it over three weeks, we see the students for four periods a week, each period being 40 minutes.*"

And lastly respondent (L3: 3):"*If ... and I think it would be fair to spend in theory and discussion, say two weeks on telephone etiquette in class which means it could be between five or ten hours for the two weeks ...*"

4.3.7 Introduction/Identification when answering incoming calls

4.3.7.1 Company or personal names

All ten respondents were questioned on how the telephone should be answered. The question being whether one should indicate the company/department first or the name of the person answering, first. The following was forthcoming:

" *Financial department, Johnson crane hire. Who would you like to speak to*?" (E1: 2).

And:

"College Fund, good day. You ... No, it is not my company, unless, maybe, if I am given my own office, and this is my direct number, I would say: Numsa, good morning" (S3: 4).

Lastly: *"Yes, that is also one of our company policies that whoever answers the phone has to state who it is that is speaking"* (E2: 6).

4.3.7.2 Image

Seven respondents referred to the importance of projecting a good image when answering incoming calls.

The following was referred to:

" The person that you are speaking to over the telephone cannot see you therefore you have to form a favourable image and that is portrayed by proper telephone training and if it is not done the image of the company is at stake" (L1: 2).

And: *"It is the most important aspect in any company. It is the first image you get"* (L3: 9).

Lastly: *"First impressions are always lasting impressions, and if your skill on the telephone, or the way of answering is not right, you are definitely breaking down your firm"* (S2: 5).

4.3.8 Important requirements regarding Telephone Etiquette

The response received from all ten respondents was divergent. The following was indicated:

"*Well, there is a hundred. The most important thing for me is:*

- *Attitude. You might not have the right answer, but if you have the right attitude, you're half way there.*
- *With attitude I would say goes friendliness;*
- *Courtesy, and all the nice things that you associate with attitude.*
- *Helpfulness. That is a big complaint I have against receptionists and switchboard operators that I deal with. You ... I feel she should at least offer an alternative"* (E2: 6).

And: "*To train the person to speak clearly, concisely, to listen and to reply accordingly*" (S2: 2).

And finally the following from respondent (E1: 2).

- "*Must be courteous to the public.*
- *Must be able to attend to queries coming in.*
- *We sometimes get difficult customers and she must be able to handle them and when the call is ended, we sit with a satisfied client.*
- *She must always present a good image of the department and the company.*
- *It is very important that she knows exactly what goes on in the company as well as in the department.*"

4.3.9 Handling social calls

Three respondents were questioned on receiving and handling social calls. The response was as follows:

"*The same as any other calls.*" When asked if many social calls are received, the answer was: " *Yes a lot.*" The respondent was further asked if it did not take up a lot of time, the answer was: "*Not*" (S1: 5).

And: "*If I have the time to take a social call, I would.*

Try and keep it as short and concise as possible.

If the call is inconvenient I will tell the person at the other end that I will get back to him/her during the evening " (S2: 4).

And lastly: "*Well I do not give them much time. They... I put first priorities to office work, second to my personal calls*" (S3: 6).

4.4 Conclusion

The above themes can be used in a task-analysis to determine present focus and development needs of Telephone Etiquette as a micro-curriculum.

Carl's (1995: 21) model for curriculum development is widely used as a guide towards sound curriculum development. Equal status is given to the four stages of curriculum development e.g. Design, Dissemination, Implementation and Evaluation of the curriculum. The themes as discussed in chapters 3 and 4 can be grouped as seen in

Fig. 4.2

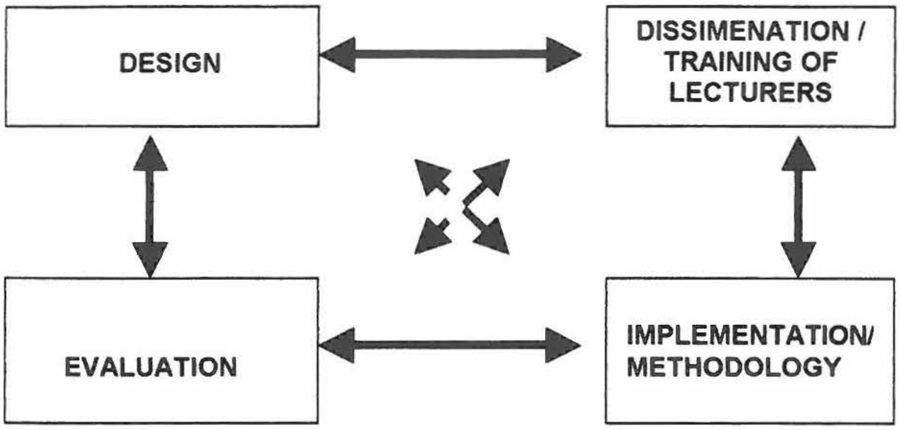


Fig 4.2

4.5 Present focus of curriculum development of Telephone Etiquette

(See Fig 4.3)

It is obvious just by glancing at the summary of the data in Fig. 4.3, that Dissemination and Evaluation are non-existent. This implies that the development of curricula for Telephone Etiquette is designed by one set of specialists, while lecturers implement the curricula without any input from students or industry or guidance from the curriculator. The fact that no evidence could be found regarding the continuous or summative evaluation of curricula implies that the process of design in this case was a once-off process, which is not revisited for efficiency.

Key to Fig 4.3:

The blue print represents the present situation while the present needs are printed in red.

Fig 4.3 Present status and needs of telephone etiquette as a curriculum

IGN

ses

nanager is not available

it on speaking to the

hniques in all

Needs to be included in new curriculum
* Needs regarding content
Cellular phones
Tele-sales
Answering machines
* Language preference
English
Afrikaans
English, Afrikaans and other
* Language proficiency
Written communication
Verbal communication
Voice: Tone and pitch
Pronunciation
Pauses and phrasing
Tempo
Variation
* E-mail
* International alphabet
* Interpersonal skills
Listening skills
Assertiveness
Handling difficult customers
Sexual harassment
Smooth caller
Emotion
Customer service
Attitude
* Messages
Message form
Important information
* Terminology
Course name
Telephone management skills
Telephone etiquette
* Call centers
* Phrases or words not to be used
Hallo
Other phrases
* Different technique application
Women vs men

2. DISSEMINATION/TRAINING
OF LECTURERS

3. IMPLEMENTATION/
METHODOLOGY

Practical application
Role- play
Simulation
Experiential learning
Included in course
Level
Directive to employers
Duration
Monitoring and feedback from employers
Training
Media
Transparencies
Video
Television
Observation
Tapes
Method
Content
Language laboratory
Compulsory training
All staff
All qualifications
Time spent on training
Introduction/Identification when
answering incoming calls
Company/ personal
Name
Image
Important requirements
Handling social calls

Methodology of present courses
Transparencies
Role-play/ simulation
Textbook
Lecturing
Study guides/ Manuals
Videos
IMPLEMENTATION
Incoming calls
Time spent
Identification/ Introduction
Manager not available
Putting callers on hold
Outgoing calls
Messages
Visitors
Language proficiency
Handling media

4.6 Summary

In this Chapter the needs and problems according to Category 3 (see Fig. 3.1 and 4.1) were discussed.

In the following Chapter (Chapter 5) a literature control is conducted.

CHAPTER 5: LITERATURE CONTROL

5.1 Introduction

In this chapter categories of themes as identified during the interviews will be compared with available literature. Areas of concern that were highlighted in the data, namely training methodology, interpersonal skills, the importance for call center training, e-mail and the etiquette for the use of cell-phones and answering machines, will be analysed.

5.2 Methodology of training

It was evident during the description of themes in Chapter 3 and 4 related to teaching methodology, that most of the content is transferred through traditional methods of teaching such as lecturing (see par. 3.4.2). In the feedback from students they indicated that lecturers used the lecturing method (see par. 3.4.2.4) and that in most cases textbooks are used in the training of Telephone Etiquette (see par. 3.4.2.3). Few lecturers tend to make use of either independent manuals or study guides. Such criticism indicates that the lecturers might lack proper curriculum development knowledge. With proper curriculum background a lecturer **"...will probably not regard the syllabus as a recipe from which one may not deviate, but rather as an opportunity to experiment and still to make it relevant and meaningful" (Carl, 1995: 2).**

Stones, (1992: 17) advocates that any quality teaching **"...should aim for quality learning".** This implies that good teaching should entail thorough setting of aims and objectives. Setting of quality objectives indirectly guides learning and assessment procedures as well. With the latest requirements from the NQF and SAQA curriculum development knowledge should be in line with OBE guidelines.

5.2.1 OBE training methodology

From the feedback from students in the scope of this research, no evidence was found that lecturers are at present not applying the principles of outcomes based education.

5.2.1.1 Roots of OBE training

According to **Tayler,** as quoted by **Van der Horst and McDonald, (1997: 9)** a number of key issues need to be considered by teachers (trainers) when developing curricula and planning instruction. These key issues are:

a)"educational objectives

b) competency-based education

c) mastery learning

d) criterion-referenced assessment".

a) Educational objectives

Of importance in the curriculum development is the defining and formulating of objectives. **Van Der Horst and McDonald, (1997: 9)** describes an objective as

" …*what* the learner must be able to do after instruction and the content to which the learner's action applies."

"Learning is not the objective, it is the tool to achieve the objective"

(Olivier, 1999: 241).

b) Competency-based education

Van Der Horst and McDonald, (1997: 10) describe competency-based education as **"…it supports the idea that all learning is individual and that the individual (whether the teacher or the learner) is goal orientated. Furthermore, the teaching-learning process is facilitated if the teacher knows what he/she wants the pupil to learn and if the learner knows exactly what he/she is required to learn. Additionally, personal responsibility or accountability for learning is emphasized."**

c) Mastery learning

"Mastery-orientated learners are those learners who focus on learning goals because they value achievement and see ability as being improvable" (Van Der Horst and McDonald, 1997: 11).

In our present education set-up little is done to achieve mastery learning as it is textbook bound and lecturers do not seem to have proactive work ethics (see par. 3.4.2.3).

According to **Van Der Horst and McDonald, (1997: 11)** learners are those who focus on learning goals and also that the **"...onus is in the teacher** (lecturer) **to provide the most suitable conditions for effective learning to occur. In ... an effort is thus made to find out why learners fail to reach mastery and to either**

- **provide more time for learning; or**
- **provide different media or materials; or**
- **diagnose which missing prerequisite knowledge or skills the learner must acquire to master the objective."**

Olivier, (1999: 8) refers to the role of the teacher (lecturer) as **"...that of a facilitator who provides guidance to learners to achieve the outcomes by guiding and mentoring them to through specific learning procedures. Assessment automatically follows the same route."**

d) Criterion–referenced assessment

With criterion-referenced assessment the scores **"...are thus not compared to those of other learners or students, but to a given or set criterion or standard of performance (Van Der Horst and McDonald: 1997: 13).**

Assessment is also **"...said to be mainly formative, which means it helps to shape or form the learner through the learning process" (Van Der Horst and McDonald, 1997: 167).**

Olivier, (1999: 8) also refers to assessment as: **"...assessment that is done in contextual, integrative and holistic ways and is based on outcomes."**

5.2.1.2 Characteristics of OBE

Van Der Horst and McDonald, (1997: 13) refers to the following four characteristics of OBE:

"1. What the learner needs to learn is stated clearly and unambiguously.

The learning outcomes are:

- **future-orientated**
- **learner centered**
- **focused on knowledge, skills and attitudes/ values**
- **characterized by high expectations of all learners**
- **a base for future instructional decision making.**

The learner is:

- **facilitated towards the achievement of the outcomes .....**
- **an active and interested participant in the learning process.**

2. The learner's progress is based on his or her demonstrated achievement.

3. Each learner's needs are catered for by means of a variety instructional strategies and assessment tools.

4. Each learner is provided the necessary time and assistance to fulfill his/her potential."

5.2.1.3 Advantages of OBE

As stated by **Van Der Horst and McDonald, (1997: 14)** there are many advantages to OBE. The following are referred to:

"* ...careful planning is vital for successful teaching. In OBE teachers are forced to plan and prepare with a clear instructional purpose in mind. The learning outcome guides the teacher 's content selection and strategic planning

*** ...learners will know what is expected from them and measure their own achievement. A learner therefore feels in control of his or her own learning. Self-assessment is thus an integral part of a successful Outcomes-Based Education program.**

*** Also, schools can accurately monitor the learner's progress in terms of specific learning attainments."**

5.2.1.4 Limitations of OBE

Much of the limitations with regard to OBE, are uncertainty, and uncertainty is the ideal breeding-ground for criticism.

Criticism in South Africa could be assigned to the vaguely worded outcomes in curriculum documents and teachers and lecturers therefore retain the content-driven instruction method. This therefore does not lead to the contribution of raising learner achievement or success **(Van Der Horst and McDonald, 1997: 16).**

One other problem that OBE is faced with is the question of finances. The implementation of OBE is going to require a great deal of financing. The teaching paternity will need to be trained, new programs will need to be developed and curricula will need to be revised. Administrative and logistic implications will also have to receive attention.

In this regard **Van Der Horst and McDonald, (1997: 19)** are of the opinion that: **"... OBE will not require a total renewal of all instructural endeavours. Curriculum developers are advised to retain what is effective from the old system and to help teachers to adapt to a new way of thinking about teaching and learning – away from rote learning towards understanding and doing."**

5.2.1.5 Structure of the NQF

The NQF refers to a single infrastructure to bring about the cataloguing of unit standards and qualifications within one of eight levels.

"All registered unit standards and qualifications will be embodied, catalogued and organized in such a manner that their interrelationships will enhance and facilitate career- pathing, portability, articulation, flexibility between education and economic sectors and promote an integrated approach towards education and training" (Olivier, 1999: 13).

This structure includes the possibility of lifelong learning. Eight levels are referred to providing for General, Further and Higher Education Bands.

Olivier (1999: 17) refers to the unit standards as: **"...being the building blocks or currency which will be used by the NQF to award credits and qualifications."**

Figure 5.1 below, refers to the above statements.

<table>
<tr><th>NQF Level</th><th>Band</th><th colspan="2">Types of qualifications and certificates</th></tr>
<tr><td>8</td><td rowspan="4">Higher Education and Training Band</td><td colspan="2">Doctorates and further research degrees</td></tr>
<tr><td>7</td><td colspan="2">Higher degrees</td></tr>
<tr><td>6</td><td colspan="2">First degrees and higher diplomas</td></tr>
<tr><td>5</td><td colspan="2">Diplomas and occupational certificates</td></tr>
<tr><td>4</td><td rowspan="3">Further Education and Training Band</td><td colspan="2">School/College/NGO certificates (Grade 12)</td></tr>
<tr><td>3</td><td colspan="2">School/College/NGO certificates</td></tr>
<tr><td>2</td><td colspan="2">School/College/NGO certificates</td></tr>
<tr><td>1</td><td rowspan="5">General Education And Training band</td><td>Senior Phase
Grades 7-9</td><td>ABET Level 4</td></tr>
<tr><td></td><td>Intermediate Phase
Grades 4-6</td><td>ABET Level 3</td></tr>
<tr><td rowspan="2"></td><td rowspan="2">Foundation Phase
Grades 1-3</td><td>ABET Level 2</td></tr>
<tr><td>ABET Level 1</td></tr>
<tr><td></td><td>Pre-school</td><td></td></tr>
</table>

MINIMUM TIME	QUALIFICATION	SAQA LEVEL	CREDITS
7 5	PhD M Tech degree	8	840 600
4	B Tech degree / Professional degree / Honours degree	7	480
3	Bachelors degree	6	360
2	Diploma	5	240
1	Certificate	5	120

Fig 5.1 NQF Levels

Source: Office of Dr. Ethney Genis, Technikon Pretoria

Ten learning hours are equal to 1 credit. At present there is no guarantee that the levels as supplied in Figures 4.1 and 4.2 are to remain as indicated above. There is a strong possibility that these are to be changed shortly. Interested parties can submit unit standards, credits and qualifications to SAQA, via the quality assurance system, for endorsement and registration of a specific level of the framework.

According to **Olivier, (1999: 17) "The assignment at a specific level will occur according to the complexity thereof as substantiated by the supporting outcomes, range statements and accompanying assessment criteria."**

5.2.1.6 OBE teaching methodologies/teaching strategies

In the process of teacher (educators) training many methods/ strategies are advocated. The views on how teachers (educators) should teach are many. With reference to OBE, **Van Der Horst and McDonald, (1997: 124)**, the teacher needs to select the most appropriate teaching method/ strategy to promote the achievement of learning outcomes. As stated previously, OBE is, for various reasons, focused on improving learner achievement; the bottom line being success for all learners.

A description of the two concepts, method and strategy, need to be sited before discussing the deductive and inductive teaching strategies.

Van Der Horst and McDonald, (1997: 124) defines the concept "teaching strategy" as:

"... a broad plan of action for teaching activities with a view to achieve an aim."

It actually is a plan of attack, which includes the broad actions of teaching and learning. The refinement of these actions are taken up in another level of the curriculum development, namely the lesson planning.

Once the strategy is decided on, the methods are to be selected. **"Teaching methods are the means by which the teacher attempts to attain the desired learning outcomes" (Van Der Horst and McDonald, 1997: 124).**

Methods used, basically refer to the use of techniques, subject matter and teaching media. **Oliva (1988: 404, as quoted by Carl, 1995: 116),** quotes five main sources which should be considered when choosing a suitable teaching method, namely: **"...objects and goals, subject content, ...the pupil, ..., the community, ..., and the teacher ..."**

The teaching strategies to be discussed are:

a) the inductive and deductive approaches and,

b) co-operative/ experiential learning as teaching strategies.

a) Deductive and Inductive teaching strategies

"Both approaches can be used in OBE, although the inductive approach is often suggested as being more suitable" (Van Der Horst and McDonald, 1997: 124).

i) Deductive strategy

The deductive approach is seen as **"principle of prior logic, which proceeds from some general law or premise, the truth for validity of which is taken for granted in advance, to some particular case; or from the cause which is already known and understood" (Van Der Horst and McDonald, 1997: 124).**

The educator who makes use of this strategy starts by supplying the learner with a general statement, a rule, law, theory or principle, and then applies this aspect to specific cases or instances. The participation of the learner is limited to the application of the given statement, rule, law or theory.

ii) Inductive strategy

"In the inductive strategy individual examples are used to bring out the general principles underlying them. Most scientific discoveries and creative processes in general are the outcome of the inductive strategy" (Van Der Horst and McDonald, 1997: 126).

In the inductive strategy a number of steps of procedures are involved. It proceeds from a step of cause or effect to the cause that which is either known or understood.

b) Co-operative (experiential) learning as a teaching strategy

In Higher Education much emphasis is placed on the importance and implementation of co-operative/experiential learning. The terms "co-operative learning" and "experiential learning are often used as inter related. In certain programs/qualifications, as offered at Higher Education Institutions (Technikons), different periods of experiential learning are included in the prescribed curriculum. This means that students are to be placed out in corporate businesses for a specified period of time. The duration of the experiential learning differs from one program to the next. In applying this, students are given the opportunity to gain first hand insight in the operation of the office environment.

In this sense the concept "Co-operative learning" as a teaching strategy, differs from the concept of "experiential learning" as applied in Technikons and other Institute of Higher Learning.

According to **Van Der Horst and McDonald (1997: 126),** the term "Co-Operative learning" refers to working in groups and: **" ...is an instructional design that stimulates peer interaction and learner-to-learner co-operation in the process of fostering successful learning by all."**

The four skills needed for co-operative learning as referred to by **Van Der Horst and McDonald (1997: 129 and 130)** are important. These skills are, forming skills, functioning skills, formulating skills and fermenting skills, also referred to as "social skills."

5.2.1.7 OBE Assessment procedures

The concept "outcomes" makes the assessment thereof an essential element. The focus of a program, unit or lesson in OBE, is a valid and reliable assessment of what the learner has achieved. With OBE it is vital that the assessment is not considered at the end of a unit of work, but must form an integral part of all the planning and preparation.

It is therefore said that OBE assessment is mainly formative as it helps to shape or form the learner through the process of learning.

(Van Der Horst and McDonald, 1997: 167).

Olivier, (1999: 9) describes outcome based assessment as **"...done in contextual, integrative and holistic ways and is based on outcomes. Outcomes based assessment**

is concerned with assessment of knowledge, skills, values and learning processes and how they are integrated into tasks and finally into outcomes. Outcomes ... always take place within a specific context, which is the context of the outcome and not the subject matter or skill competencies."

Assessment is transparent as learners participate in the process.

Another aspect with regard to OBE assessment is the term "continuous assessment." This term is defined by **Pahad, (1997: 2)** as the: **"Assessment carried out during the everyday teaching and learning process under normal conditions, NOT just testing more often; often called CASS for short."**

With reference to OBE one should also refer to the concept of portfolio assessment. A portfolio is a useful way of gathering and keeping evidence of a learner's personal growth and development. The content of such a portfolio will depend on age and level of competence of the learner. The learner should be guided and informed what should actually go into such a portfolio. As a start, the evidence taken up in such a portfolio will be written evidence of achievements, but eventually it could contain a greater variety of evidence. It could be predicted that a portfolio could replace the present CV.

In a portfolio real proof and evidence of competences, are demonstrated.

There are mainly 3 kinds of assessment as referred to by **Van Der Horst and McDonald, (1997: 171).** These are:

1. Diagnostic assessment

This type of assessment is used prior to the teaching or at the beginning of a lesson, and provides planning information.

"The information gained in this way helps the teacher to know what the learner's entry levels are – what they know about the lesson topic" (Van Der Horst and McDonald, 1997: 171).

2. Formative assessment

The educator and lecturer receive information from this kind of assessment. This includes information problems, errors made previously misunderstandings, understandings and progress. This method also helps educators to adapt to teaching strategies and methods.

3. Summative assessment

This form of assessment is usually done at the end of a lesson, a unit or a course; this being the final measure of what was learnt.

"When summative assessment is well developed and matched to individual learners, it will tell you about your teaching as well as about your learners' learning. This is what you should aim for in OBE"(Van Der Horst and McDonald, 1997: 173).

Portfolios, as referred to above, can provide such comprehensive information.

5.3 Communication and interpersonal skills

During the interviews with the various categories of respondents, namely employers, lecturers and secretaries regarding Telephone Etiquette it was evident that there might be a need to equip all employees, including management, with effective communication – and interpersonal skills. These include aspects such as written – and verbal communication, language, vocabulary, language patterns and phraseology, interpersonal communication skills, the ability to handle e-mail, cell-phones, and answering machines and the ability to make use of the international alphabet. (See Chapter 4).

5.3.1 Written communication

Written communication is used as much as verbal communication in all organizations. Verbal, written, and non-verbal communication form an integral part of the communication in an organization, internally and externally.

According to **Burton, (1997: 139)** written communication is as important as telephone and face-to-face communication and states that: **"Many people find that writing what they mean is very much more difficult than saying what they mean and, just like the spoken word, there is an art in choosing the correct written word."**

The only form of written communication, for the purpose of this study, is the taking of telephone messages.

From the interviews conducted, it seems that for the efficient and effective taking of telephone messages, one needs more that just written communication skills (see Chapter 4, par 4.3.1.5 sub-par. 4.3.1.5.1.).

"Taking telephone messages may seem a simple enough task, but all to often messages are incorrect, incomplete or not passed on. At best this is unprofessional, at worst it can have disastrous consequences"(Burton, 1997: 62).

Important aspects with regard to correct message taking includes:

1) Delivering the message within an acceptable time-scale. Of importance too is that the receiver of the message uses his or her own initiative in deciding on the action to be taken if the person for whom the message is attended for is not available for a certain time or days. It might even be possible that the receiver of the messages will have to contact the caller to explain the delay.

2) Accuracy. The following information should be obtained from the caller and checked with him or her before ending the call:

   - Who the message is for; preferably the name and surname,
   - The name and other details of the person who called,
   - The caller's telephone number, plus the area code,

the date and time the message was taken. (See par. 4.3.1.10, a) and b).

- The message itself. Keep it as short and precise as possible, without having to leave out important detail. Language proficiency also comes into play.
- The action the colleague is to take, e.g. "phone back or left a message.
- Who took the message.

3) Never commit anybody to an action that cannot be guaranteed, for e.g. indicating a time scale that is likely to pass before returning the call.

4) Listen carefully to what the caller is saying and ensure that the message is understood correctly to prevent a distorted message being received.

Some companies use standard telephone message pads that prompt the asking of relevant questions. Modern information technology makes it easy enough to design ones own customised message pad/form **(Burton, 1997: 61–63).**

5.3.2 Verbal communication skills

Research has proven that more often than not, the success of interaction between people depend on interpersonal aspects rather than on the content of the interaction. During any verbal interaction the success of the transfer of the message can be translated to vocal quality and content of the interaction. During any direct interaction three aspects are important, namely, body language which determine 58%, vocal quality 35% and content 7%. With Telephone Etiquette body language is not relevant, therefore the 58% gets added to vocal quality. This implies that the interpersonal intention and emotional behaviour of both parties, during a telephonic interaction, is very important. **The Institute of Personnel Management (1998: 83),** states that **"Since communication is at the heart of each organisation's functioning, we need to identify and analyse the styles of communication."**

According to **Lomas (Career Success, September, 1996)** the components are as follows: **"55% *Non verbal communication* ...38% *Vocal component ... 7% verbal component*".** And **"Conversation – the actual words a person uses- makes up the final 7 percent of a person's total initial impact".**

For the purpose of this study, verbal communication will refer to:

a) Voice application

To communicate effectively the receiver of a telephone call needs to pay attention to his or her own voice quality. Within the first few seconds of the verbal interaction the caller will make a positive or negative association with the receiver, or company called.

The manner in which the voice is used has an effect on creating an image either professionally or otherwise.

"Even if your telephone technique is excellent, if the voice is not used to good effect, the impression the caller forms of the person to whom they are speaking may not be favourable"(Burton, 1997:50).

One needs to speak slowly and carefully to indicate interest in the caller personally and in the problem **(Fielding, 1996: 234).**

This first interaction relates directly to the voice quality of the receiver and includes four major aspects **(Business Presentation Skills, 1997: 13)** namely,

i) Pitch and tone

The pitch and tone of voice or modulation indicate to the other party how mature the other person is.

ii) Projection

Projection indicates how loud or soft a person speaks. This therefore refers to the volume of the speakers voice and indicates how confident the speaker is.

iii) Pace

Pace indicates how fast the person speaks, as well as the levels of energy of the speaker.

iv) Pause

Pause indicates the time the speaker will allow the listener to respond before replying or giving feedback.

To be able to understand how the voice can make an impression on the caller, the need exists to examine each component of the voice. This should include the aspects sited above, including emphasis and clarity **(Burton, 1997: 50–52).**

Emphasis, according to **Burton, (1997: 50)**, refers to that as being an aspect of voice use that could change the meaning of a phrase or sentence.

"Overall, emphasis is a useful and important element of the voice which gives additional interest and meaning to what is being said, but if used carelessly, can betray personal opinions, which are best not disclosed."

Clarity of the voice is of importance especially when dealing with foreigners or people from different regions where the dialect may be different. "**Pace and volume play an**

important part in ensuring the voice is clear, as words may be lost or unclear if the pace is too fast or the volume too low" (Burton, 1997: 52).

Often it is said: "put a smile in the voice." **"Although the caller cannot see the smile, it will certainly be heard, "...and this will make you sound and feel more positive and confident" (Burton, 1997: 52).**

b) Vocabulary, Language and Phraseology

In communication words have specific functions, which are to:

- **"give facts**
- **express emotions**
- **persuade**
- **acknowledge people's presence**

Words on their own have no meaning. They take on meaning as people use them" (Fielding, 1996: 173 and 175).

It is therefore important to pay attention to words or phrases used when conversing over the telephone. Casual remarks, words or phrases made to callers, can be damaging to the company. The choice of words such as: "not yet returned" or "unavailable at the moment" could be very damaging (see par. 3.5.1.3).

In a business conversation the highest degree of professionalism should be maintained.

The use of slang in a conversation is not professional. Phrases like the following are considered being unprofessional: "Hang on, Ta, Bye."

Burton, (1997: 16) refers to an incident where the following language was used: **"We don't just change things willy-nilly, you know and, It sounds to me like you've bitten of more than you can chew. Not only was this approach very rude but the language was also totally inappropriate."**

In the same vain attention should be given to the use of jargon **Fielding, (1996: 195)** defines jargon as: **"...any language that is hard to understand ..."**
Burton, (1997: 16) describes it as: **"...the use of industry language that the customer would not normally be expected to understand."**

"Customers expect you to speak in a language which they can understand, and may either feel embarrassed at having to ask you to explain what you mean, or annoyed at which might be considered your superior attitude" (Burton, 1997: 16).

5.3.3 Interpersonal skills

Burton, (1997: xi) refers to good interpersonal skills as **"...the key to success in any job, and in most industries. In a working situation, where employees are in continuous contact with each other and with the public, the ability to interact and communicate well is essential to the outcome of so much of the work they do."**

a) Listening skills

Effective communication requires effective listening **(Institute for Personnel Management, 1998: 92 (IPM)**. All elements involved in the reception and processing of the message are aspects of listening. Like many other skills listening must be developed by careful, attentive practice.

Good listening forms part of any job and is one of the key interpersonal skills. Most people prefer to talk rather than to listen. It is easy to switch off while listening to someone else. It is quite easy to detect when someone has stopped listening **(Burton, 1997: 21).**

According to **Fielding, (1996: 233)** people stop listening for six reasons:

- **"They make up their minds in advance about what the caller is going to say.**
- **Something draws their attention away from the call.**
- **The caller has an uninteresting voice**
- **The caller has an accent that is hard to understand.**
- **They panic because they are inexperienced in handling difficult calls.**
- **The caller is angry."**

Listening is a natural process and one of which most people are completely unaware. You will have to train yourself to listen carefully to everything that the customer says to you, and this takes considerable effort and practice"

(Burton, 1997: 21).

One needs to indicate that: **"...you are listening by saying 'I see' or 'yes' or 'mmm' (Fielding, 1996: 234).**

b) Assertiveness, The difficult customer, Emotion and Attitude and Sexual harassment

i) Assertiveness

Burton, (1997: 192) describes assertiveness as: **"...the art of stating your case clearly, concisely and respectfully to others. Assertiveness is a form of behaviour which is used to communicate to others when we speak or when we use body language. Good communication skills often require a high degree of assertiveness to enable us to say what we think, want and feel in a way which honest, but at the same time, respects the feeling of others".**

Assertiveness is being pleasantly direct. Being assertive is not the same as being aggressive.

When receiving calls, one sometimes needs to be assertive because: **"Assertive people will negotiate and work towards a satisfactory solution to a problem which is acceptable to both parties. The assertive person has self- confidence and personal security and therefore has no need to put others down (Burton, 1997: 203)** (see par.4.1.3.9 (b)).

In the implementation of Telephone Etiquette one should also refer to the handling of the aggressive caller. In this regard, **Burton (1997: 81)** states: **"If the caller is very aggressive, you might begin to feel your confidence ebb away, and it will be at this point that you may begin to sound a little hesitant or start to make mistakes. This will only serve to give the caller something more to criticize. To be effective you need to strike a delicate balance; remain firm but polite and do not allow yourself to become defensive."** (Refer also to ii) below).

ii) The difficult customer

Many of the calls dealt with may be from difficult customers. The difficult caller is usually someone who is very angry or irritable before making the call, perhaps totally unrelated to the company being contacted at that specific time. Other callers might just be downright nasty. There is very little one can do to please such callers and **"...they are likely to huff and puff and show their irritation and displeasure no matter how well the call is dealt with"(Burton, (1997: 81).**

Having to deal with such callers can be a very unnerving experience, but never the less needs to be dealt with in the most professional way possible, remain calm and avoid being unpleasant back. What should be remembered however is that the abuse is not directed to the receiver personally.

"If people do behave badly, or in a way you dislike, or that upsets you, don't take it personally. Don't personalise"(Amos, 1999: 14).

"If you do respond in a rude or unpleasant manner this will simply exacerbate the problem, ..." (Burton, 1997: 81).

iii) Emotion and attitude

Emotion and attitude play an important role in the "how" of Telephone Etiquette (see par. 4.1.3.9, f and h).

"One of the main ingredients of good customer care is a positive attitude" (Burton, 1997: 26).

Emotion and attitude also includes politeness, and efficiency.

With reference to politeness and efficiency **Burton, (1997: 29)** indicates: **"Being polite to customers is essential at all times. Try to find out the customer's name early on in the conversation, and use it when speaking to them. At some point in the conversation – whether face-to-face or over the telephone – give your own name. Not only does this help to build a personal relationship between you and the customer, but also allows the customer to ask for you by name whenever he or she needs to contact your office. This is especially important with telephone conversations, as you cannot be seen visually.**

Being efficient is a combination of your knowledge, skill and attitude."

iv) Sexual Harassment

Sexual harassment does not occur only in the physical work environment, but could also occur during a telephone conversation. **Robbins, (1998: 408-409),** defines sexual harassment as: **"...unwelcome advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature."**

Organisations have generally made progress in the last few years in: **"...limiting overt forms of sexual harassment of female employees. This includes, recurring requests for dates when it is made clear the woman isn't interested."**

It could also be a more subtle form like: **"...misinterpretation of where the line between "being friendly" end, and "harassment" begins."**

Sexual harassment is all about power.

5.3.4 The use of E-mail and answer phones.

E-mail refers to electronic mail and is used by means of computer links. The electronic mail system makes it possible to send messages via computers to other people outside the organisastion, if their e-mail address is known. **"Studies have shown that electronic mail significantly reduces the amount of inter-office mail, photocopying and time on the telephone" (Fielding, 1996: 332).**

On the downside though, e-mail does not **"convey the emotions and nuances that come trough from verbal intonations in telephone conversations" (Robbins, 1998: 335).**

The same technique used to ensure that a message is readable and understood correctly, is applicable to all other messages received, by phone or otherwise **(Fielding, 1996: 540).**

Very much the same technique should be followed when retrieving messages from an answer phone as would be when taking telephone messages, **"...except that in the case of a very long message it may be necessary to paraphrase, so it is important that although the message is brief, it is still meaningful to the person for whom it is intended" (Burton, 1997: 70).**

5.3.5 International Alphabet

An aspect that is needed to aid communication skills is the international alphabet or known also as the phonetic alphabet.

"This is a list of words that are recognized as indicating certain letters of the alphabet, and serves to ensure that they are not confused with any other" (Burton, 1997: 74).

5.4 Summary

In this chapter literature was analysed regarding recent trends and opinions related to training methodology, written and verbal communication, and the value of interpersonal skills.

CHAPTER 6: CONCLUSION AND RECOMMENDATIONS

6.1 Introduction

In this chapter conclusions and recommendations will be described and discussed.

Before formulating the conclusions and recommendations of the study, the researcher will quote the aims and objectives of the study again.

6.2 Aim

The aim of this study is to develop a training framework for Telephone Etiquette in terms of the South African Quality Assurance (SAQA). This includes the determining of the NQF-level of competence.

To reach the above aim, the following objectives are relevant:

Objective 1

To evaluate existing Telephone Etiquette with regard to the requirements of Corporate Business by interviewing respondents from industry and tertiary institutions

Objective 2

To design a model for a learning curriculum.

6.3 Conclusions

The following are the conclusions derived at regarding the present state of Telephone Etiquette.

6.3.1 Present teaching and training of Telephone Etiquette

6.3.1.1 Content of courses

Present content does not seem to be relevant enough regarding present needs and changes in the application of Telephone Etiquette (see par. 3.4.1 and 3.4.1.1 – 3.4.1.5).

6.3.1.2 Methodology of present courses

It is clear from the data that traditional lecturing methods are still being applied (see par. 3.4.2 –3.4.2.5).

6.3.1.3. Duration of training

From the data obtained it is clear that Institutions of Higher Learning differ vastly in the time spent on the training of Telephone Etiquette (see par. 3.4.3).

6.3.2 Present application of Telephone Etiquette

With regard to the present application of Telephone Etiquette, the following conclusions are derived at:

6.3.2.1 Incoming calls

When the response of interviews, conducted with employers and secretaries, are compared with the response and material received from lecturers, it seems that the importance of the "how" and "why" of incoming calls is not sufficiently emphasized. It also seems that lecturers in Telephone Etiquette are not in touch with requirements set by corporate business (see par. 3.5.1.1 to 3.5.1.8). A further conclusion is that secretaries, on average, spend 70% of their time answering the telephone.

6.3.2.2 Outgoing calls

The conclusion in this regard is that managers seem to prefer that their secretaries make outgoing calls on their behalf (see par.3.5.2).

6.3.2.3 Messages

The taking down of precise and accurate messages seems to be problematic (see par. 3.5.3). In this regard the importance and application of language proficiency, also needs to be referred to (see par. 3.5.5).

6.3.2.4 Visitors

The conclusion reached regarding the simultaneous answering of the phone and receiving visitors, is that the answering of the telephone has precedents over attending to a visitor (see par. 3.5.4).

6.3.2.5 Language proficiency

It seems that not enough emphasis is placed on the importance of being efficient in English. Being able to answer the telephone correctly and take clear, concise messages one needs to be efficient in the language in which the communication takes place (see par. 3.5.5 and 3.5.3).

6.3.2.6 Handling media

It is clear from the data that traditional lecturing methods are still being applied (see par. 6.3.1).

Further more, it seems that the practical application in the use of the telephone is neglected (see par. 3.4.2–3.4.2.5, 6.3.1, and 4.3.1.7).

6.3.2.7 In-house training, orientation, and additional training

The data clearly indicates that corporate businesses need to take notice of the need for and application of in-house training, orientation and or the additional training of Telephone Etiquette (see par. 3.5.7,3.5.71, and 3.5.7.2).

6.3.2.8 Telephone Etiquette to be included in all qualifications

The response referred to in paragraph 3.5.8, clearly indicates the need for Telephone Etiquette to be included in all qualifications offered at Institutions of Higher Learning.

6.3.3 Needs and problems

The needs and problems relating to Telephone Etiquette include the following:

6.3.3.1 Cell phones, tele-sales and answering machines

Students and staff need training with regarding cell. phones, (see par. 4.3.1.1), tele-sales and answering machines (see par. 4.3.1.2 and 4.3.1.3).

6.3.3.2 Language preference and language proficiency

From the interviews it is clear that the emphasis is on English. Language proficiency, which includes written and verbal communication, is of the utmost importance (see par.4.3.1.5.1 and 4.3.1.5.2 a to f).

6.3.3.3 E-Mail

It is clear from the respondents that more than 50% is of the opinion that E-Mail will, at present, not have an affect on the amount of telephone calls made. Aspects as referred to in the previous paragraph, are therefore still a need in the training of Telephone Etiquette (see par. 5.3.4).

6.3.3.4 Practical application

The practical application in the training of Telephone Etiquette seems to be of great importance. This includes the making use of role-play, simulation and experiential learning (see par. 4.3.1.7 a to c).

6.3.3.5 International alphabet

It is clear from the respondents that this aspect is not included in the training of Telephone Etiquette. It is however of importance in the taking down of clear and efficient messages as well as names and surnames (see par. 4.3.1.8 and 5.3.5).

6.3.3.6 Interpersonal skills

According to the response from respondents this aspect is of the utmost importance, and includes many aspects (see par. 4.1.3.9 a to h).

6.3.3.7 Messages

Included is the taking down of messages as well as important information (see par. 4.3.1.10).

6.3.3.8 Terminology

The fact that each Institution of Higher Learning uses its own terminology for the training of Telephone Etiquette poses a problem. The need thus arises that a common term be used (see par. 4.3.2.1 a and b).

6.3.3.9 Call centers

The establishment of call centers seems to be a fairly new development in South Africa.

As the only communication with clients, by these call centers, are by means of the telephone, the requirements of these centers, with regard to Telephone Etiquette, be included in the training of students (see par. 4.3.3).

6.3.3.10 Phrases or words not to be used

The response from respondents clearly indicates that certain words or phrases should not be used when answering the telephone or transferring calls. The use of certain words or phrases could therefore be problematic (see par. 4.3.4.1 to 4.3.4.2).

The introduction or identification used when answering incoming calls also poses problems. These include the use of the company or personal names and the image that is portrayed (see par.4.3.7.1 and 4.3.7.2).

6.3.3.11 Different technique application

The application of the manner in which women and men are addressed seem to be different. The need thus arises that students should be trained on these differences and how it influences the manner in which calls are dealt with (see par. 4.3.5 and 6.3.3.10).

6.3.3.12 Training

Many aspects with regard to the training of Telephone Etiquette seem to be problematic. These include aspects on the media and methods used, the content of the syllabi, the making use of language laboratories, compulsory training and time spent on training (see par. 4.3.6 a to f).

6.3.3.13 Important requirements with regard to Telephone Etiquette

The requirements with regard to Telephone Etiquette seem to be diverse. The needs for these requirements need to be addressed (see par. 4.3.8).

6.3.3.14 Dissemination and Evaluation

With reference to Fig 4.3 it is obvious that Dissemination and Evaluation is non-existent (see par. 4.5).

6.4 Recommendations

6.4.1 <u>Importance of training Telephone Etiquette</u>

It is recommended that students, lecturers/trainers, and corporate business alike, take training on Telephone Etiquette seriously. Respondent (E2: 12) indicated the following: *"...although Mr. so-and-so said this or that, they never take him serious on the phone. They take him serious when you are in a one-on-one situation ...".*

This respondent also indicated *"...there is a big question for that* (telephone training) *in the work place."*

There needs to be a change in the mindset of corporate business that employees do not need training in "answering the telephone" (E2: 8).

All courses/short courses on Telephone Etiquette should be registered with SAQA so as to standardize the training with regard to content and outcomes (see par.3.5.7 to 3.5.7.2, 4.3.6 (e) and 6.3.2.7).

6.4.2 Methodology

The training should incorporate the application of practical training to the maximum. The incorporation of applicable media, laboratories, office simulation and role-play should be utilized to its full extent. Students should be given the opportunity to practice the answering the telephone and applying the rules of telephone usage. Lecturers/trainers should do away with traditional lecturing methods. The importance of OBE should be kept in mind, with special reference to the implementation of cross-field outcomes (see par. 3.4.2 to 3.4.2.5, 3.5.6, 4.3.1.7, 4.3.6, 5.2, 5.2.1, 5.2.1.1, 5.2.1.2, 5.2.1.6, 6.3.1.2,6.3.2.6, 6.3.3.4 and 6.3.3.11).

It is further recommended that the training of Telephone Etiquette be done in smaller groups and that all available laboratories be fully utilized.

While taking part in Sertec –evaluation visits it was realized that many Institutions of Higher Education have, for example, fully equipped language laboratories but these are not incorporated in the training of Telephone Etiquette.

6.4.3 Duration and content of the training

The time allocated and the content of the course as offered by Institions of Higher Learning should be standardized (see par. 3.4.3, 4.3.1 to 4.3.1.5.2 and 4.3.6 (f)).

The content should include aspects regarding the following:

- In-coming and out-going calls (see par. 3.4.1- 3.4.1.5, 3.5.1-3.5.2, 3.5.1.1 to 3.5.1.8, 3.5.2, 4.3.5 and 4.3.7 to 4.3.7.2).
- Handling of visitors while on the telephone and social calls (see par. 3.5.4, 4.3.9 and 6.3.2.4).
- The correct and efficient taking down of messages (see par. 3.5.3, 4.3.1.10, 6.3.2.3 and 6.3.3.6).
- Communication. All aspects of verbal, written and non-verbal communication. This should also include voice training (see par.4.3.1.5 to 4.3.1.5.2, 5.3 and 5.3.1, and 5.3.2).
- Interpersonal skills. All aspects, with special reference to listening skills (see par. 4.1.3.9, 5.3.3 and 6.3.3.5).
- The handling of cell phones, tele-sales and answering machines (see par. 4.3.1.1, 4.3.1.2, 4.3.1.3 and 6.3.3.1).
- Language proficiency and language preference (see par. 3.5.5, 4.3.1.4 to 4.3.1.5, 6.3.3.2 and 6.3.2.5).
- International alphabet (see par. 5.3.4, 4.3.1.8 and 6.3.3.5).
- Phrases and words not to be used (see par. 4.3.4 to 4.3.4.2 and 6.3.3.9).
- Differences in handling men and women on the telephone (see par.4.3.5 and 6.3.3.10).
- All additional requirements as indicated by respondents (see par.4.3.5 and 4.3.8).

Present courses should be re-written to include relevant content and according to the requirements of SAQA (see par. 1.6.7, 1.6.8, 1.6.9, 1.6.11, 3.4.1, 3.4.1.1, 3.4.1.5, 4.3.8, 6.3.1.1 and 6.3.3.12).

6.4.4 Call centers

As referred to in paragraph 6.3.3.8 these centers are still fairly new in South Africa. According to respondent E2: 14, there is a definite need for the training of staff for these centers. As indicated further: *"If you don't have a module on call centers, it is something you will have to look at because the market is definitely demanding. And this should be included in the module on telephone techniques*" (see also par. 4.3.3 and 6.3.3.8)

In the **Sunday Times, Business Times, June 11, 2000,** the following was said by **Leigh Anne O'Brien of Europe Assistance: "I used to employ staff direct from hospitals,** (used for agents for a Health Call Center), **so they had no specific call center skills. The results were poor service, no telephone techniques, no manners and plenty of unhappy customers."**

6.4.5 E-Mail

Students should be trained practically on the receiving and sending of e-mail (see par. 4.3.1.6, 5.3.4, and 6.3.3.3).

6.4.6 Terminology

The outcomes, as referred to in OBE, should correspond (see par. 6.3.2 to 6.3.2.8). It is further recommended that the name, by which the module/unit on Telephone Etiquette is known, be standardized and be identified by using the term "Telephone Management skills" (see par 1.6.1 to 1.6.3, 4.3.2.1, and 6.3.3,7).

6.4.7 <u>All qualifications to include Telephone Etiquette</u>

It is recommended that all programs offered by Technikons and other Institutions of Higher Learning include a module/unit in "Telephone Management Skills" (see par. 3.5.8, 4.3.6 (e) (ii), 4.3.6 (e), and 6.3.2.8).

6.4.8 <u>Development of curriculum for Telephone Etiquette</u>

It is recommended that the curriculum in future be designed and developed according to sound curriculum criteria and principles (see par. 4.5).

6.4.9 <u>Outcomes and cross-field outcomes</u>

Clear outcomes and cross-field outcomes are to be formulated (see par. 1.6.7 and 5.2.1 to 5.2.1.6).

6.5 Implications of this study

This study focused on a specific context, namely the inclusion and importance of Telephone Etiquette included in various programs and perceived by lecturers/trainers, employers and secretaries/employees. It also includes curriculum development with reference to the requirements of SAQA and the NQF. Worthwhile insight has been obtained with this study and can serve as a guideline for implementation at Institutions of Higher Learning.

6.6 Shortcomings

Shortcomings of this study are seen to be that present students in Institutions for Higher Education were not interviewed. More inputs from employers could also have been obtained.

6.7 Further research

Given the data obtained with this study, it is clear that not all avenues regarding the subject have been researched. Further research on this topic could be undertaken. Curriculum development could also be researched further in lieu of the SAQA requirements and OBE.

6.8 Self critique

During this study it has been realized that members of the teaching paternity are not eager to share documentation and are also not willing to part with such documentation. Difficulty in obtaining interviews was also experienced.

On the positive side this study has brought about the realization of how important it is to keep abreast with developments in the office environment, and shortcomings in the presentation of Telephone Etiquette.

This study has also indicated the reluctance of lecturers/trainers to use modern methodologies in the teaching/training of the subject as well as a reluctance to fully utilize available laboratories.

6.9 Final conclusion

The aim to determine the skills, practices and knowledge on Telephone Etiquette, as applied to the requirements of SAQA and the NQF is determined satisfactory.

The study therefore once again emphasizes the importance and shortcomings of Telephone Etiquette as contained in the different programmes offered at different Institutions of Higher Learning.

It is trusted that this study will encourage lecturers/trainers and students alike to realize the importance, need and practicing of effective Telephone Etiquette in the world at work.

LIST OF SOURCES

ALLISON, AL 1993: Quantity and Quality in Social research. London. Routledge.

AMOS, JA 1999: Self Management & Personal Effectiveness. Newton Place: How to books Ltd. Second Edition.

BARNES, C and MANNING, M 1988: Professional Excellence for Secretaries. USA: Crisp Publications, Inc.

BOGDAN, RC & BIKLEN, SK 1992: Qualitative Research for Education. London: Croom Helm.

BONE, D 1988: The Business of Listening. USA: Crisp Publications Inc.

BOTHA, CA 1992: A Task of many Facets. Pretoria: Symbol Books.

BRECHT, GRANT 1997: Sorting out relationships. Australia: Prentice Hall.

BURGESS, RG ed. 1993: Strategies of educational research. London: The Falmer Press.

BURTON J& L, 1997: Interpersonal Skills for Travel and Tourism. Harlow: Longman.

BUSINESS PRESENTATION SKILLS (PTY) LTD 1997: Wendywood

CAREER SUCCESS, SEPTEMBER 1996 Vol. 9 Issue 8. LOMAS, D: Connecting with your customers (pp15-18), and First Impression lasting impression (pp 25-26). Johannesburg: Dictum Publishers.

CAREER SUCCESS AUGUST 1997 Vol. 10 Issue 8 (pp 15-18). The truth about secretaries. Johannesburg: Dictum Publishers.

CARL, AE 1995: Teacher Empowerment through Curriculum Development. Theory into Practice. Cape Town: Juta & Co. Ltd.

CRESWELL, JW 1994: Research Design. Qualitative and quantitative approaches. London: Sage Publications.

CRONBACH, LJ 1982: Critical Validity Parole: How can we go straight. New Directions Measurement Volume 5.

DECKER, B 1988: The Art of Communicating. Achieving Interpersonal Impact in Business. USA: Crisp Publications, Inc.

DUNCKEL, J 1992: Business Etiquette: Second Edition. USA: Self-counsel Press Ltd.

EDUCATION INFORMATION CENTER (EIC) 1997: Understanding the National Qualifications Framework. A guide to Lifelong Learning. Pretoria: Heinemann Publishers.

EKSTEEN, FRLN 1996: Business Management. An introduction. Cape Town: Nasou.

ELSWORTH, DA 1994: Doing Naturalistic Inquiry: a Guide to Methods. London: Sage Publications.

EVANS, DW 1990: People, Communication & Organisations. London: Pitman Publication.

FIELDING, M 1996: Effective Communication in Organisations. Preparing messages that Communicate; Second Edition. Kenwyn: Juta & Co Ltd.

FRAENKEL, JR AND WALLEN, NE 1993: How to Design and Evaluate research. New York: Warner.

GALL, NK, BORG, M, AND GALL, S 1996: Qualitative Approaches to Evaluation in Education. London: The Falmer Press.

GAY, RF 1992: Social Research Methods. Puzzles and Solutions: New York

GENIS, Dr E: JANUARY 1999: Technikon qualifications in the National Qualifications Framework. Part 1. Guideline for the preparation of Technikon Qualifications for registration.

GUBA, EG & LINCOLN, YS 1985: Naturalistic inquiry. Beverley Hills, California: Sage Publications.

HAMACHEL, D 1989: Psychology in Teaching Learning and Growth. Fourth Edition. San Diego: Prentice Hall Inc.

HOPKINS, T & NEWTON, P 1996: The Official guide to Success. Scottsdale, Arizona: Champion Press.

HORNBY, AS 1981: Oxford Student's Dictionary of Current English. Oxford University press.

INSTITUTE FOR PERSONNEL MANAGEMENT 1998: Industrial communication. Study guide 2: ICOM.

JANSE VAN RENSBURG, G 1994: Research, Practical & Theory, Pretoria: HAUM.

KALLAUS, NF and KEELING BL 1991: Administrative Office Management. Ohio: South-Western Publishing Co. Tenth Edition.

KEEVES, JP 1988: Education research methodology and measurement. An international handbook. Oxford: Pergamom Press.

KEMBER, D & KELLY, F 1993: Alongitudinal Process Model of Drop-out from Distance Education. Journal of Higher Education, 60 (3), May/June, pp 278-301

KERLINGER, 1985: Foundations of behavioral research. New York: Rinehart and Winston Inc.

KINCHELOE, RA 1991: Focus Groups. A Practical Guide for Applied Research. Newbury Park: Sage.

KINGRY, MJ TIEDJE, LB & FRIEDMAN, L 1990: Focus groups: A research technique. Michigan: Biomedical Research Support.

KRAAK, A 1998: Competing education and training policies. A'systematic'versus 'unit standards'approach. Pretoria: HSRC.

MARSHALL, C & ROSSMAN, G 1994: Designing qualitative research. London: Sage Publications.

LOTTER A 1996: Die betrokkenheid van Dosente by Kurrikulum Ontwikkeling aan 'n gedesentraliseerde multi-kampus Universiteit (D. Ed, RAU).

MARTIN, WB 1989: Quality Customer Service. USA: Crisp Publications Inc.

MORSE, J 1994: Curriculum Action Research. London: Kogan Page.

MERRIAM, SB 1991: Case study research in education. A qualitative approach. San Francisco: Jossey-Bass Publishers.

MOUTON, J & MARAIS, HC 1990: Metodology van die geesteswetenskappe: Basiese begrippe. RGN- studies in navorsingsmetodologie,I. Pretoria: Raad vir Geesteswetenskaplike Navorsing.

OLIVA, PF 1988: Developing the Curriculum. Boston: Scott, Foresman and Company. Second Edition.

OLIVIER, CAS 1999: Let's Educate, Train and Learn Outcomes-Based. A3D experience in creativity. Pretoria: Benedic.

PAHAD, MEG 1997: Assessment and the National Qualifications Framework. A Guide to teachers. Pretoria: Heinemann Publishers.

PARTLETT, MQ & HAMILTON, GJ 1976: Qualitative Evaluation Methods. Beverley Hills

PATTON, MQ 1987: Qualitative evaluation methods. Beverley Hills: Sage Publications.

ROBBINS, SP 1998: Organizational Behavior. San Diego: Prentice Hall Inc. Eight Edition.

ROBOTTOM, JH & HART, IS 1993 Qualitative Interviewing. New Delhi: Sage Publications.

RSA: South African Authority Act, 1995 Act Number 58 of 1995. Government Gazette Vol. 393, Num 18787: Pretoria: Government Printers.

RSA: White Paper on Education and Training. Government Printers, Pretoria.

RUDESTAM, KE & NEWTON, RR 1992: Surviving your Dissertation, California: Sage Publications.

SAQA. Implementing National Qualifications Framework. Criteria and Guidelines for ETQA Accreditation of Providers. Draft for further publication

SAQA, NSB MANUAL February 1999: Pretoria: Government Printers

SAQA Update, June 1999, July/August 1999, November 1999, and December 1999: Pretoria: Government Printers.

SAQA Bulletin, Vol. 4, No1, May 2000: Pretoria.

SCHOEMAN E 1989: Goeie Maniere & Etiket. Kaapstad: Human & Rousseau.

SCHOEMAN E 1999: Sarie Moderne Maniere. Kaapstad: Human & Rousseau.

SEKELEKO, J 1997: Qualitative Methodology, In-house Publication: University of the North.

STANFELD, B 1993: Critical Issues in Qualitative Research. London: Sage Publications.

STONES, E 1992: Quality Teaching. A sample of cases. London.

STRAUSS, A & CORBIN, J 1996: Basics of qualitative research: Grounded theory procedures and techniques. London: Sage Publications.

SUNDAY TIMES. BUSINESS TIMES: JUNE 11, 2000. SURVEY/CALL CENTERS.

SWANSON, IS & CHAPMAN JJ 1994: Behoefte bepaling: Pretoria: Butterworth.

TOMKINS, S 1991: The Secretaries Survival Manual. London: Kogan Page Limited.

TRUTER, C 1989: Successful Business and Professional Conduct. Kenwyn: Juta & Co. Ltd.

TYLER, T 1950: Basic Principles of Curriculum and Instruction.

VAN DER HORST, H & McDONALD, R 1997: Outcomes-Based Education. A Teacher's Manual. Cape Town: Kagiso Publishers.

WALFORD, N 1994: Inventing Knowledge. London: Maskew Millar.

WALS, W 1992: Research Methods in Education: An Introduction. Fifth Edition. Boston: Allyn &. Bacon.

WEITZMAN, DE & MILESTONE J 1995: Critical Inquiry. London: Sage Publications.

YIN, RK 1989: Case study research. Design and methods. London: Sage Publications.