

TIPS & TRICKS FOR TELEPHONE ETIQUETTE

The telephone is one of the most important and commonly used tools in business. Multitudes of businesses, companies, and departments use telephones in their work every day; however, most of us don't think of the telephone as a tool, and as a result, accidentally misuse it. The telephone is a link between us and the world outside our business or department. Unfortunately, sometimes we don't pay attention or make a conscious effort to monitor what kind of message we are sending to our callers and the outside world.

Some basic rules of telephone etiquette are. . .

- Speak directly into the mouthpiece of the phone or a headset while talking
- **DO NOT** eat or chew gum while talking on the telephone
- **DO NOT** cover the phone with your hand or put it against your chest to avoid the caller hearing you. Chances are, they will still be able to comprehend what you are saying.
- If you are interrupted or must talk to somebody else in your workplace while you are on the phone, simply ask the caller if they can hold and press the *HOLD* button.
- **DO NOT** place the handset in the cradle until you've pressed the *HOLD* button.
- **DO NOT** lay the receiver on the desk, without placing the caller on hold (the caller will hear everything being discussed in your office).
- Always be courteous

When answering the telephone. . .

- Always try to answer your own telephone whenever possible
- Always practice answering your telephone within 2-3 rings

To greet the caller. . .

- LARGER ORGANIZATIONS – “Thank you for calling (dept. name). How may I direct your call?”
- SMALLER ORGANIZATIONS – “Thank you for calling (dept. name). May I help you?”
- DEPARTMENTS – “(dept. name), Mary Smith,” OR “Mary Smith, may I help you?”

There has been a lot of discussion of using “good morning” or “good afternoon.” This is unnecessary if you use the right tone. Also, people tend to make mistakes when using these phrases (i.e., saying “good morning” when it's really afternoon and vice versa).

When placing a caller on *HOLD*. . .

- Remember to ask your caller “Do you mind holding?” or “May I put you on hold?” before doing so.
- If you take the time to ask your caller to hold, be sure to listen to the response.
- After placing your caller on hold, check back periodically (between 30-45 seconds). Give them the option to continue to hold if it will take longer to find information OR offer to call them back.
- When returning to your caller, remember to thank them for waiting.
- If your caller cannot hold, offer to take a message; transfer to another party; or arrange for them to return the call at a specific time.
- If you are not in a position to ask your caller to hold, tell the caller, “Please Hold” before depressing the hold button. NOTE: When placing multiple calls on hold, remember to return to the first caller you placed on hold first!!

When you are transferring a phone call. . .

- 1) Make sure to explain to the caller the REASON why you are transferring their call
- 2) Verify that it is all with the caller for you to transfer them
- 3) Call the department or person where you are transferring a call to and make sure that they can take the call.
 - If they are able to take the call. . .
 - Give them the person’s name, request, and any other relevant information.
- 4) Return to your caller and give them the name of the person they are being transferred to, the department and the telephone number (if possible).

**When you’re not sure to whom a call should be transferred to, take the caller’s name and telephone number and find out where the call needs to be transferred to. Also, give the caller your name and phone number as a reference in case the appropriate party does not contact them.*

SCREENING TELEPHONE CALLS

There is a lot of controversy over whether or not telephone calls should be screened. It is not recommended to screen calls if you want to enhance or encourage good public relations. You should always lean towards not screening calls if at all possible. “Yes he’s in. May I tell him who’s calling, please?” is an example of an appropriate response when you are *not* screening calls.

If someone is available *ONLY* to certain individuals and you must *screen* phone calls, lean towards using responses like, “She’s away from her office; may I take your name and number?” *OR*, “May I ask who’s calling? Thank you. Let me check and see if he’s in.”

**If you are required to ask who is calling or what the nature of the call is, be aware of your tone of voice. Screening calls is always a delicate situation, so it is critical not to offend or put your caller on the defensive with your voice tone.*

THE "IN CONFERENCE" TRAP

Phrases such as the two phrase, "He's in conference" or "She's in a meeting," are greatly overused, so many people don't believe you when you use this phrase. The most appropriate response you can give a caller is that someone is **not available** or **unavailable**; however, it is crucial afterwards to indicate when the person will be available

Ex. *"She's not available, but I do expect her back in the office at 3:00 p.m."*

DO NOT use responses such as:

- He isn't in yet
- She's out for coffee
- He's gone for the day (and its 3:00 p.m.)
- She's in, but she's busy

*****NOTE: If, on occasion, you say that an individual is "in a meeting," ALWAYS include an approximate time when he or she will be available or out of that meeting.**

When taking messages. . .

Always try to use telephone message forms, if available, to record messages. Telephone message forms practically guarantee for accurate, organized phone messages along with obtaining complete information.

A good phone message includes:

- Name of person for whom the message was left
- Caller's name (get the correct spelling), company or dept. and number
- Date and time
- Message
- Action to be taken (i.e., "Please Call," "Will call back," or "URGENT")

It is crucial to deliver the message to the person it is intended for as soon as possible and to maintain confidentiality with all messages. When delivering a written message, either turn the message over or fold it in half, as to not risk them being easily read by other staff members or visitors.

When returning a phone call. . .

Playing phone tag can be frustrating, so to avoid returning phone calls to a person who is unavailable, try establishing specific times to call-back or try asking, “When is the best time for me to call again?” or “When is the best time for them to call me back?”

*When taking calls for another individual, schedule return calls during specific blocks of time.

Ex. “I expect him to return by 2:00 p.m. You can reach him between 2 and 5”).

When placing Outbound Calls. . .

Be sure you have the right telephone number before you place an outbound call. Keeping a “frequently called numbers” list within reach could prove be very helpful. Try utilizing a few of these suggestions:

- Prepare yourself. Visualize your caller as a friendly, positive person
- Plan the objectives you want to accomplish by jotting them down ahead of time
- State your concerns up front to identify the information you need to obtain from the conversation
- Assume what questions or objections you may encounter prior to placing the call and devise answers to them to avoid making additional calls
- Take notes during the outbound call
- Specify any follow-up action to the caller, such as, when you plan to get back to him

When you are leaving a message. . .

When you reach an answering device, such as a voice mail or an answering machine, be sure to leave the following information:

- Your name and the correct of you name spelling (if necessary).
- Your department and telephone number
- The date and time you called
- Message
- When you are available to take calls

To conclude the conversation. . .

Many people dread bringing a telephone conversation to an end. Here are some tips to avoid any awkwardness and to close your conversation with professionalism:

- Talk in the past tense.
- Try utilizing a “closing” phrase, such as, “I’m really glad you called” or “I’m glad we resolved this concern.”
- State the action you will take.

- Assert any follow-up actions, such as time frames or deadlines.
- Thank them for calling and say “Good-bye”. Refrain from using slurs, slang, or phrases, such as, “bye-bye,” “Okie-dokie,” or, “Alrighty.”

PROPER TELEPHONE LANGUAGE

Although we express a lot to our callers through the sound and the tone of our voice, what words and phrases we use in a conversation can also convey a significant message. Sometimes people neglect this and end up delivering a negative message to the caller. Pay attention of what type of language you are using. For example, instead of beginning a sentence with phrases like, “You have to-,” “You need to-,” or, “Why didn’t you?” try starting with words like, “Will you please?” or, “Would you please?”

Never refer to a matter or inquiry as, “Your problem” or “Your complaint.” Instead, try using better phrasing and identifying it as something along the lines of, “Your question,” “Your concern,” or, “This situation.” When you do not have the knowledge or expertise to handle a caller’s situation, never reply with remarks like, “I can’t do that” or, “that’s not my job.” Instead, try a more helpful approach by outlining what actions and steps you *are* capable of taking to aid their situation.

Ex. “While I’m not able to establish policy on this matter, I will speak to my manager about your concern.”

Avoid coming off as abrupt and unprofessional by all means, and refrain from using expressions, such as:

- “Hang on.”
- “Hold on.”
- “Who’s calling?”
- “I can’t hear you, speak up!”
- “I can’t help you. You’ll have to speak to someone else.”

The following terminology would be more appropriate:

- “May I put you on hold?”
- “May I say who is calling please?”
- “I am having a little difficulty hearing you. Can you please speak up?”
- “I need to transfer your call to (dept.) so that they can answer your question. May I do so?”