Telephone Etiquette: Thirty-Six Tips

Before you answer be prepared (this includes knowing how to use the phone/system features):

1. Turn away from your computer, desk or other work.
2. Have pens, pencils and notepaper handy.

In answering the phone:

3. Answer calls promptly, by the second or third ring.
4. Smile as you pick up the phone.
5. Assume your "telephone" voice, controlling your volume and speed.
6. Project a tone that is enthusiastic, natural, attentive and respectful.
7. Greet the caller and identify yourself and your company/department/unit.
8. Ask, "To whom am I speaking?"
9. Ask, "How may I help you?"

In the course of the conversation:

10. Focus your entire attention on the caller.
12. Use Plain English and avoid unnecessary jargon and acronyms.
13. Use action specific words and directions.
14. Use the caller's name during the conversation.
15. Always speak calmly and choose your words naturally.
16. Use all of your listening skills:
   a. Focus your full attention on the caller and the conversation.
b. Listen "between" the words.

c. Use reflective/active listening to clarify and check for understanding.

17. If there is a problem, project a tone that is concerned, empathetic, and apologetic.

18. Avoid the Five Forbidden Phrases.

a. "I don't know"

Instead, say: "That is a good question; let me find out for you" or offer to connect the caller with someone who could provide the answer. If a call involves some research, assure the person that you will call back by a specific time. If you do not have an answer by the deadline, call back to say, “I don’t have an answer yet, but I’m still researching it.” There is no excuse for not returning calls.

b. "I/we can't do that."

Instead say: "This is what I/we can do."

c. "You'll have to"

Instead say: "You will need to" or "I need you to" or “Here’s how we can help you.”

d. "Just a second"

Instead: Give a more honest estimate of how long it will take you and/or let them know what you are doing.

e. "No."

Instead: Find a way to state the situation positively.

19. Use "LEAPS" with the emotional caller to vent.

L Listen; allow the caller to vent.

E Empathize; acknowledge the person's feelings

A Apologize when appropriate, even if the problem is not your fault, you can say, "I am really sorry this has happened" and mean it.

P (Be) Positive

S Solve; suggest/generate solutions that you can both agree on and/or ask what you can do to help and, if reasonable, do it! If not, find a compromise.

In concluding the call:
20. End the conversation with agreement on what is to happen next; if you are to follow-up, do so immediately.

21. Thank the caller for calling; invite the caller to call again.

In transferring calls:

22. Transfer ONLY when necessary; get the information yourself.

23. If you must transfer, avoid the use of the word "transfer." Say instead: "I am going to connect you with".

24. Explain why you are "transferring" the call.

25. Give the caller the person's name and direct number

26. Stay on the line and introduce the caller.

In taking messages:

27. Identify yourself and for whom you are answering the phone.

28. Practice political sensitivity.

29. Indicate the period of time the person will be unavailable.

30. Write down all the important information given:

   a. The name of the caller. Ask for spelling if unclear.

   b. The (correct) telephone number of the caller.

   c. The message. Ask for clarification if necessary.

31. Read back what you've written to be sure you've understood the message correctly.

32. Always assure the person that you will deliver the message promptly.

33. Deliver the message in a timely fashion.

NEVER:

34. Eat, drink or chew gum while on the phone.

35. Leave an open line:

   a. Place the caller on hold
b. Check back with the caller frequently: every 30-45 seconds.

ALWAYS:

36. Put a smile in your telephone voice and let your personality shine!

The Complaint Call

Complaint callers who are irate are really saying, "I rate." They have bought into society's "the squeaky wheel gets the grease" mentality. When that happens, try the EAR method:

E mpathize with the caller.

A pologize and acknowledge the problem.

Accept R esponsibility. (You'll do something.)

Empathize with the caller. This is different from sympathy, where you take on someone else's problem. Try to understand how the person is feeling.

Apologize and acknowledge the problem. You don't have to agree with the caller, but express regret that there is a problem. People want to be heard, and no one's complaint is trivial. Each deserves prompt handling, so do not deal with it in a trivial manner.

Accept responsibility. Make sure something is done. Take it upon yourself to DO something. Many times, that's all that people want: the reassurance that something will be done. People want to be helped. They want to know that you care. Use these phrases to get that sentiment across: "How can I help you?" "What can I do for you?" "I'll make sure this message/information gets to the right person."

The acceptance of responsibility may be as simple as forwarding the call to the appropriate individual or sending the caller more information. If you do forward the caller to someone else on your staff, follow up with that person to make sure the caller was taken care of.

If you get an irate caller, or even one who is calm, cool, and collected, here are some more methods to handle complaint calls:

First, don't overreact, especially if the caller starts using "trigger" words or phrases, such as: "I want to talk to someone who knows something." Most people respond by getting defensive when their "hot-button words" are pressed. Remember, a positive attitude is the most important asset you have.

Second, listen completely to the complaint. Allow the caller the opportunity to vent some frustration. When you listen, don't try to apply logic to the situation. Many people are beyond logic if they are angry, so accept the feelings being expressed. Avoid argument and criticism.

Third, do not blame anyone -- the caller, yourself, or someone on your staff -- even if you know who is to blame for a problem. This information should not be shared with the caller.
Fourth, paraphrase the caller's comments, and ask questions if you do not understand the information being presented to you. Restate the problem as you understand it.

Fifth, offer solutions and, if appropriate, offer alternatives. Providing alternatives empowers callers. It gives callers a feeling that they were not dictated to and that they were part of the solution.

Finally, confirm the solution with the caller. Make sure the caller agrees with what has been decided.

Of course, not everyone will be happy, no matter what you do. These people will not be content; they just like being grumpy. Usually, these are the people who want to talk to the person "above you." If that is what it takes to lessen their anger, then do so. By the time they have been transferred to a supervisor, they usually have become calmer and less demanding. It seems that they just needed to vent their anger at someone: you. Just remember that most people are not that way and keep a firm grip on that positive attitude of yours.

How do people answer the phone in different parts of the world?

In Spain they say "Get on with it!"
In Italy they say "Ready!"
In the Czech Republic they say "Ahoy!"
In Japan they say "Mushi-mushi!"
In New Zealand they ask "Are you there?"
In Hong Kong they say "Waay!"
In the Netherlands they say "With..."
In Finland they state their full name

Ways to answer the Phone!

"Hi."
"Hola!"
"Hey wassup?"
"You have reached the residence of ____________, but no one is here right now... so please leave a...."
"Thank you, please pull around."
"Do-do-do- I'm sorry, you call cannot be completed as dialed!"
"Burp!"

"Talk to I!"

"911 Emergency!"

"Pizza Hut, may I take your order?"

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**Life Skills for Vocational Success**


Telephone Skills

Work Related Telephone Skills

**OBJECTIVES**

1. Develop proper phone skills for speaking to a potential employee.
2. Develop proper phone skills when at work.

**MATERIALS NEEDED**

access to at least one telephone

most recent local Sunday newspaper

paper

pens or pencils

**SUPPLEMENTAL RESOURCES**

*Job Search/Job Survival* – A $199.00 video package by Educational Design, Inc. (1800 221-9372). The *Job Search* video provides dramatizations of appropriate phone skills when contacting a potential employee.

**INSTRUCTIONAL FORMAT**

This lesson will provide training on proper phone etiquette when looking for work and while on the job. It is important to stress that a person's presentation on the phone is a significant factor in obtaining a job. Additionally, poor phone skills at work can decrease an employee's chance for advancement or a pay raise.

1. Discuss contacting a potential employer. First, one may have to answer a want ad with a call to the company. This call might involve answering questions, obtaining information about the job, and finding out where and how to apply for the position. Second, following an interview or submission of an application, the applicant should follow up with a phone call to ask about the status of the position. This demonstrates an interest to the employer. Regardless of why the applicant is calling, it is important that he speak clearly, identify who he is, and indicate the position in which he is interested.
2. Use modeling and role-playing to provide students an opportunity to learn and practice telephone skills when contacting a potential employee. There are sample scripts below to help guide the role-plays.

Role-play 1
Employer: "Hello, Johnson Industries."
Applicant: "Hi, my name is student's name, and I am calling about the ad in the Sunday paper for the Customer Service Representative Position." (speak clearly and state who you are and why you are calling)
Employer: "OK, what I need you to do is come down to the office and fill out an application."
Applicant: "Could you tell me where you are located?" (you may want to write the information down)
Employer: "Do you know where the McDonalds® is on Main Street?"
Applicant: "Yes, I do." (try to say more than "yeah" or "no")
Employer: "Good, we are located right across the street."
Applicant: "When is a good time to come by and who should I ask for?"
Employer: "You can come by any time before 5 p.m. today, and ask for me, Fred Stevenson."
Applicant: "Thank you Mr. Stevenson." (always be polite)
Employer: "You are welcome."

Role-play 2
Receptionist: "Good afternoon, McDonnel and Associates."
Applicant: "Hi, may I please speak to Ms. Fredrickson?" (use formal names)
Receptionist: "Ms. Fedrickson is in a meeting right now."
Applicant: "May I leave a message?" (ask to leave a message)
Receptionist: "Yes."
Applicant: "My name is student's name and I am calling about the status of the job opening as her assistant. My number is 555-1234."
Receptionist: "OK, I'll give her the message."
Applicant: "Thank you." (always be polite)

Role-play 3
Applicant: "Hello." (When you are doing a job search, answer the phone with an appropriate greeting each time you answer the phone. You may give a potential employer the wrong impression if you answer the phone with a greeting such as "Yo" or "Yea.")
Employer: "Hi, may I speak to student's name."
Applicant: "This is she/he." (make sure people respond in a polite way)
Employer: "This is Ms. Fredrickson from McDonnel and Associates."
Applicant: "How are you Ms. Fredrickson?"
Employer: "I am fine. I have read over your application, and I am interested in having you come in for an interview."
Applicant: "That would be great. When would you like me to stop by?"
Employer: "How does Tuesday at 10 a.m. sound?"
Applicant: "That sounds good. Your office is located by Evergreen School on Elm Street, right?" (don't forget to ask where you need to be)
Employer: "That's correct."
"It is suggested that the applicant ask questions such as "Who will interview me? How long will the interview last? Should I bring anything?"

3. It is suggested that the class look at employment classifieds from the local Sunday paper and find want ads that instruct the reader to call a number for more information. Have each student make at least one call to practice the skills learned above.

4. Discuss phone etiquette at work. Different companies will have different procedures for answering the phones, directing phone calls, and taking messages. Review these basic procedures.

   o Greet the caller and indicate the organization. "Hello. This is Krueger Automotive. May I help you?"

   o If the person the caller is asking for is available, transfer the call.

   o If the person the caller is asking for is not available, ask if you can take a message. Never tell the caller why the person is not available unless they are in a meeting, with a customer, or on another line. Telling the caller that the person is in the bathroom or running errands is too personal.

   o Write down all the necessary information that your boss wants you to when taking messages.

   o If the caller is a customer who wants help from you, be as helpful as possible. Direct the caller to person who can help if you can't. Always return calls as quickly as possible if you need to get the correct information and indicated that you would call back.

   o Ask about the company's policy is on personal phone calls. A good rule of thumb is to only make or receive personal phone calls during breaks. See the unit titled Family Responsibilities for additional information. Find out about the policy regarding cell phones and pagers.

5. Practice taking phone messages. The trainer can model appropriate ways to take phone messages. It is suggested that the class decide on a company name and what information they should get for taking a message. It does not matter who the caller asks for because that person will never be in the office. The class members can critique and provide suggestions to the person answering the phone.

6. If it is feasible, it is suggested that students get an opportunity to answer phones at the program where they are receiving training. This will give them an opportunity to practice what they learned within the framework of an actual workplace's procedures.

**SIGNS OF GENERALIZATION**

Students use proper phone etiquette when searching or working at a job. If students can complete exercise number 3 and number 6 above, they should have the skills for future situations involving the phone and work.