

Professionalism on the Phone



- Creating first impressions
 - Setting the tone
 - Communicating effectively



YOU are the first person with whom the caller will come into contact.

YOU will create the first impression of this business for the caller. Make it a good one!

1. If employer does NOT have a specific protocol for answering the phone, use a simple “Hello” or “Good morning” or “Good afternoon”
2. Identify yourself and the place of business
Also do this when making a call
3. Ask how you might help the caller
Ex: “Hello, this is Dave at South Central Services. How may I help you?”

- Answer with a friendly, courteous tone of voice (no monotone responses)
- Smile – even when talking on the telephone!
- Be interested, proactive in assisting the caller
- Be polite, even with difficult callers

- Use golden rule - Respond the way you would hope someone would respond to you





If you need to place a caller on hold:

1. Explain that you will be placing the caller on hold and ask if that is OK with him or her
2. **WAIT** for the person's response before continuing!
3. Do not keep someone on hold for more than 20-30 seconds
4. **Thank** the caller for patiently waiting before resuming or transferring the call
5. If someone in office is not available, do not give long explanation about why he/she cannot take the call (filing nails, eating lunch, etc.)
 - Just stepped out / busy

- Be sure to repeat information back to the caller to ensure that you have understood it correctly
 - Especially numbers, names, dates, spellings
- When taking written messages, always include:
 - Date of call
 - Time of call
 - Caller's name, phone number, and e-mail (if applicable)
 - Brief summary of message, nature of call
 - Best time to call back



- Give answers only if you have been trained in that area and you know the answer, or if you have complete information available
- When in doubt, refer the question on to a supervisor



- Keep folder of information handy on topics most commonly requested
 - Review the folder/file often so you can quickly and easily find information



- Traveler's Insurance Company study (9% vs. 82%)
- Courtesy, efficiency, and thoroughness are KEY
- Do not argue or sound grudging. Maintain cheerful/respectful tone of voice



1. Empathize with caller by saying, “I understand that you are upset about”

2. Apologize that there has been a problem



3. Assure the caller that the problem will be addressed

- If possible, offer a solution to issue.
- If issue should be addressed by another person in the office, take down thorough information about the problem. Then repeat information back to caller. Ask for phone number or way caller can be reached with a response.
- Do not make promises about solutions you are not authorized to make
- Respond with positive attitude. Ex: “That is tough. Let’s see what we can do to work this out.”
- Do not blame anyone, even if you know who is at fault. Instead, listen completely and assure caller that complaint will be addressed.

ADDITIONAL DOs and DON'Ts

- DO:

- Speak slowly and clearly. Many of your callers may be elderly persons who are hard of hearing.
- Be patient and willing to repeat information
- Offer to transfer the call if there is someone else in the office more qualified to answer the question
- Offer to take a note if you cannot answer the question and there is no one in the office at the time who can assist.
- Remember that not everyone is familiar with voice mail. Instead of just saying “I will transfer you to his/her voice mail” be willing to explain that voice mail is a message system. Offer to take a handwritten note if the caller is more comfortable explaining the message to you.
- Thank the caller



DO NOT:



- Let the phone ring more than three times, if possible
- Answer with food in mouth
- Interrupt or argue with the caller
- Try to answer a question to which you do not know the answer
- Promise specific answers, solutions if the call is to be referred to someone else
- Assume the caller knows about your organization
- Hesitate to ask the caller to repeat information