



Phone Etiquette Reference Guide

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Introduction

In today's world the telephone is one of the most important tools used to do business in any organization.

There are many ways to insure the telephone is being used in the most effective manner possible. In this reference guide you will acquire several key skills to insure that your telephone manner is working for you and not against you.

Topics Include:



Your Role in an Organization



Do's and Don'ts of Telephone Etiquette



Establishing Effective Listening Skills



Handling Hectic Situations

Your Role

Everyone knows first impressions are often lasting impressions. As a receptionist, each time you answer the phone the caller is receiving an impression of your company. It is your job to sell the company image. If you answer in a professional manner, that image is portrayed. If you answer tired, rushed or bored a much different image comes across and people will remember that!

If you are new to a company the best way to start is to establish how you are expected to answer the phone. Some organizations prefer a simple “Good Morning, XYZ Company” while others prefer the person answering the phone be identified. For example, “Good Morning, XYZ Company, this is Joan Speaking. How may I help you?”

It is also very helpful to familiarize yourself with the company. What do they do? What service do they offer? What is the mailing address? What is the fax number? These are all things you should know which will help save time and establish credibility.

Once you have engaged in a polite, courteous conversation with the caller the next important part of your job is taking an accurate message. A good clear message will enable the recipient to respond in a timely, efficient manner. Here are some good things to remember:

- Ask for the spelling of the caller’s name. If it is an unusual name it might be helpful to write down the pronunciation in quotes. Example: Boucher – “Bushay”

- Always write down the number where the caller can be reached. If the caller says, “she has the number” ask for it anyway, it saves the time of looking up the number later on.

- If the caller does not offer to leave a message, ask. Any additional information you can get will be helpful to the recipient when returning the call.

- Note the time and date of the call.

- Remember to write legibly and clearly.

Do's and Don'ts of Telephone Etiquette

It is very important to be aware of what you say to callers when the person they are trying to reach is not available. For example it is 10:00 a.m. and Joanne from XYZ Company calls for Jim, the sales manager. Jim, however, has not come in to the office yet. Naturally you may blurt out, "*I'm sorry, Jim has not come into the office yet.*" Do you think Jim would like his callers to know he has overslept? Of course not. A more professional response would be "*Jim is not in the office at the moment, may I take a message?*" Below are a few similar situations and how they should be handled appropriately.

DON'T SAY: "Susan is not available but I'll have her get back to you"

DO SAY: "Susan is not available at the moment but I'll be sure to give her the message."

DON'T SAY: "Sara went home early."

DO SAY: "Sara will be out of the office for the rest of the day, may I take a message for her?"

DON'T SAY: "Jeff has gone to the bathroom (or lunch)."

DO SAY: "Jeff has stepped away from his desk for a moment, may I take a message?"

DON'T SAY: "Tom is busy right now."

DO SAY: "Tom is not available at the moment, may I give him a message?"

DON'T SAY: "I think Megan is busy. Hang on, let me check."

DO SAY: "I'll see if Megan is available. Would you mind holding for a moment?"

Establishing Effective Listening Skills

Listening skills are vital to effective telephone communications to ensure calls are handled properly and messages are taken accurately. The following are a few helpful hints for establishing good listening skills.

- Sit up and maintain a “*professional*” *body posture*. This display of confidence will surely come through in your voice.
- Make listening a priority*. Concentrate on listening to the caller’s name and what they are calling about.
- Stay Focused*. Avoid distractions around you.
- Remember that you are there to help the caller. If there is a problem *show some empathy*.
- Keep an open mind*. Don’t assume you know what the caller wants or needs. Let them tell you.
- Focus on content not on delivery*. Don’t find yourself wondering if the person with the southern accent grew up in Texas or Tennessee. Focus on what they are saying, not how they are saying it.
- Don’t interrupt*. Let them talk.
- Use phrases like “yes” or “I understand” (*listening noises*) so the caller knows you are paying attention.
- Take notes*. You will be more attentive and will be able to respond more efficiently.
- Tell them what *action* will be taken. For example, “I’ll transfer you to the sales department now, Mr. Jones.” Or “I’ll be sure Jon receives your message.”

Handling Hectic Situations

What do you do if calls are coming in one after another, messages are piling up and no one is at their desk? Here are a few tips to help you handle hectic situations gracefully and efficiently.

- ❑ First and foremost, don't panic! This will only make the situation worse. Your callers should never feel that they do not have your complete attention. Concentrate on keeping your voice relaxed and smile when you speak. A smile on your face will come through in your voice and also help you feel more composed.
- ❑ Nobody likes to be greeted with "XYZ company, please hold," but what do you do if two calls are coming in at once? If possible, it is better to finish with the first caller before picking up the second call. On average, people will become annoyed after being on hold only for 15 seconds but will wait patiently for up to six rings.
- ❑ This all sounds very manageable but what if your first caller begins giving you unnecessary information and won't let you off the line? Here you must gain control of the situation without being rude to the caller. Politely interrupt, repeat the point you feel the caller is trying to make and take action, whether it be transferring the caller to the appropriate person or answering a question.
- ❑ If you have no choice but to put the caller on hold it is important to do so in a courteous fashion. Ask if you can put them on hold and wait for them to answer you. Few callers will object if they are treated with respect. Another nice touch is to use the callers name. For example, "Mr. Jones, may I ask you to hold for a moment?"
- ❑ Another key to handling calls quickly and efficiently is to always be prepared. Knowing everybody's role in the company (and their whereabouts) will save you valuable time when directing calls. You have enough going on without having to search for information that could be at your fingertips.