

TECHNIQUES FOR THE TELEPHONE

Projecting a positive image of your organization often begins and ends on the telephone. Remember, you are the first voice – and sometimes the only voice a caller will hear. Therefore, your attitude, your inflection, and your manner is crucial in forming a winning opinion in the mind of your caller.

INCOMING CALLS

Remember, How You Sound Is Their Image of Your Organization

1. Give yourself a cue to smile before you pick up the phone. Believe it or not, your voice will sound friendlier.
2. Answer in as few rings as possible. Follow the “Three Ring Policy”.
3. You’re a professional. You can manage any behavior or mood you may be in. Your attitude is your key to success.
4. Think “E” – ENERGY. The energy in your voice reflects your attitude and enthusiasm.
5. Eating or drinking while talking on the phone is inappropriate. If your mouth is full when the telephone rings, wait a few seconds before answering.
6. Watch your voice quality. It is made up of your energy, rate of speech, pitch and inflection.
7. Position your telephone so the receiver/headset can be picked up without banging into anything.
8. Hold or position the receiver/headset directly in front of you and two fingers away from your mouth.
9. Your “Telephone Voice” will sound best if you are sitting “tall”.
10. Avoid side conversations. Your caller deserves your full attention.
11. Try not to speak too rapidly. It conveys impatience.
12. Don’t be an “interrupter”. Wait for a natural break, and then speak. Remember, the caller has a right to speak their piece.

ANSWERING THE TELEPHONE

WHAT TO SAY

- A. Greeting – “Hello” or “Good Morning”
- B. Name of Department – “Health Benefits”
- C. Your Name – “This is _____.”
- D. Offer Assistance - “How May I Help You”

EXAMPLE #1: “Good morning, Hoover Elementary School, Lisa Wells speaking, how may I help you?”

EXAMPLE #2: “Good afternoon, Personnel Department, this is Carl, how can I be of assistance?”

My Style of Greeting:

PLACING CALLERS ON HOLD

Always check to see that the caller is placed on hold before discussing his or her concern with someone.

When you place a caller on hold to answer another line, it is courteous to ask for permission and **WAIT FOR AN ANSWER.**

EXAMPLE: “Happy Elementary, are you able to hold while I answer the other line?”

Wait for their response.

When you return to the caller.

“Thank you for waiting, how may I help you?”

Do not leave a caller on hold for long periods of time. (30 to 60 seconds) If something is causing you to be delayed, check back with the caller and see if they prefer remaining on hold or if they would like to be called back.

EXAMPLE: “Mr. Woodson is still on the other line. Would you like to continue to hold?” (Check after 30 to 60 seconds). If the caller says yes, check again: I’m sorry, I think he’s going to be a while longer. Do you wish to continue holding, may I have him return your call or may I direct your call to someone else who might be able to assist you?

“He is aware you’re holding and will be with you as soon as possible.”

ENDING A CALL

WHAT TO SAY IN A COURTEOUS MANNER

- A. Thank the caller**
- B. Ask the caller if they have any other concerns**
- C. Assure the caller of any follow-up actions**
- D. Leave the caller with a positive feeling**

EXAMPLE #1: “Thank you for calling, is there anything else I may help you with? Great, have a nice day.”

EXAMPLE #2: “Thank you for calling, I am glad we were able to help/assist you with your concern. Do you have any additional concerns at this time? Have a nice day.

WHAT TO DO

Wait for the caller to hang up just in case a concern suddenly arises.



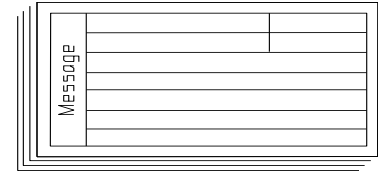
Listening Techniques

The following are useful phrases to convey you are listening.

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| PARAPHRASING | <ul style="list-style-type: none">✓ Let's recap.✓ Let me see if I understand.✓ What I'm hearing is...✓ As you see it, ...✓ Correct me if I'm wrong.... |
| REFLECTING FEELING | <ul style="list-style-type: none">✓ You feel...because...✓ You believe...✓ I'm picking up that you...✓ As you see it...✓ It appears you are... |
| FOLLOWING | <ul style="list-style-type: none">✓ I see.✓ Go on.✓ Really.✓ For instance?✓ Absolutely. |

ESSENTIALS FOR TAKING A MESSAGE

1. Keep a telephone message pad handy by your phone and don't forget to use it.
2. If you don't understand something in the message, ask for clarification and verification.
3. Verify the accuracy of the information – the caller's number, correct spelling of his/her name, and when party can best reach them.
4. Print or write legibly.



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| Message | | |
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REMEMBER TO OBTAIN THIS INFORMATION:

1. Name of the person to whom the message is directed.
2. Name of the caller, first & last name, Mr., Mrs., Ms., Dr., etc. (Repeat the spelling of the caller's first and last names to ensure accuracy).
3. Name of organization, school, department, agency or group the caller is affiliated with. (Again, repeat the spelling).
4. Telephone number of caller, with area code and extension if applicable. You may also want to inquire if this is direct or voice mail.
5. Date and time of call.
6. The message, which should be written or printed legibly. If the caller leaves more than one telephone number, be sure to write on the message the times when the caller can be reach at those numbers.
7. Any action to be taken.
8. Your name or initials as message taker.

10 TIPS FOR KEEPING FRESH AND COOL UNDER PRESSURE

- Take brisk walks on your break.
- Post motivational quotes on your phone or around your work station.
- Get more sleep at night.
- Take breaks and lunch with **positive** co-workers.
- Share your feelings about work with friends and family members.
- Eat a healthy lunch.
- Listen to motivational tapes on your way to work.
- Make time for your hobbies.
- Keep a funny picture near your phone so you remember to SMILE.
- Allow yourself one five minute phone call to a friend during your break or lunch.