

TAKING PHONE CALLS



Objectives:

At the end of the Workshop, the participants will be able to:

- Use effective call greetings as a caller and receiver
- Project Del Mar's image in a positive manner
- Practice good telephone techniques and telephone manners
- Use appropriate language during telephone conversations
- Speak with an effective telephone voice
- Use an effective approach to handle special telephone tasks like call transfers, taking messages, call backs, holds, interruptions, and unintentional disconnects
- Manage Difficult Calls
- Learn to manage stress levels during calls

Key Topics

- Your first impression
- Your voice
- Tips and preparing mentally
- Answer & close etiquette
- Frustrations for callers
- Coping with difficult people

YOUR FIRST IMPRESSION



Etiquette Essentials From Start to Finish

Learn the best **greeting** to make a positive first impression and what it takes to advance that first impression into a positive lasting impression.

Taking **control of the call**, placing calls on **hold** and **transferring** calls are three seemingly simple tasks that are really major "danger zones."

Learn how to handle these delicate situations with phone skills etiquette in a way that makes the interaction as pleasant as possible for the caller. You aren't out of the woods yet!

Even if the call is managed skillfully, all the hard work can be quickly erased if the call isn't closed efficiently and positively.

We'll examine subtle and not-so-subtle habits that can damage relationships with callers, and then we'll conclude this session with skills for **wrapping up the call** that will leave your caller smiling.

The proper way to answer the telephone is however your department wants you to. Whatever your verbiage, answer in such a way the person on the other end will not draw a conclusion that the person who answered is cold and aloof, and hesitates to communicate readily.

Basic Telephone Techniques



Today's technology allows you to handle more customer service calls than ever before. But when telephone personnel lack call management skills, the only thing you get from all that technology is the ability to serve more people poorly. That means losing customers - and profits. Your telephone personality has a definite bearing on your rating with Del Mar!

Important First Impressions

Contrary to popular belief, treating others as you want to be treated really isn't the best practice when it comes to communication styles, because it assumes that everyone is just like YOU.

Communication is an art and mastering that art can be the key for building stronger customer relationships.

Sound/Look familiar?

You can become confident that you are doing this part of your work correctly if you will practice the proper techniques.



Answer Promptly

- Answer before the third ring if at all possible.
- If you're talking on another line or to a person at your desk, excuse yourself, answer the phone, permit the caller to state his/her purpose, then tell him/her you are on another line and ask him/her if he/she can wait for a minute, or ask if they'd like to leave a message.

Identify Yourself

What should you say when you answer the phone?

Suggestion:

- When answering someone's else's line, give the name of the company and your name.
- When answering your own line you can give department and name at the same time and then your name; i.e., "Del Mar College Center for Business, Sally Mae speaking"...

YOUR VOICE



Talk with a Smile in Your Voice – Be Courteous

- Rapid speech suggests impatience; rapid speech is difficult to follow in face-to-face conversation, necessitates repetition in telephone conversations. **SLOW DOWN.**
- Slow speech, in contrast conveys an impression of lethargy, forgetfulness, lack of vitality.

MAKE AN EFFORT TO QUICKEN THE PACE.

Talk with a Smile in Your Voice

- Be kind, polite, direct, enthusiastic, and speak with a strong voice.
- Try to have little or no background noise, i.e. loud radio.
- Don't be too familiar.
- Do not yell or talk to others in the room while you are on the telephone.
- Do not eat, drink, or chew gum while talking on the telephone.
- Always have paper and pen by the telephone.
- When answering the telephone and the caller did not hear your introduction and says, "Is _____ in?" DO NOT respond with: "Yes." This is confusing to the caller. Instead, answer by saying, "This is he/she" or "Speaking."



Close the Call Correctly

When the conversation is completed, what do you do?

- Make sure that the caller has no more queries
- Use “Goodbye, thank your for calling,” or some other appropriate closing to indicate the conversation is ended.
- Let the caller put down the receiver first so they don't feel you have cut them off.

Transfer Calls Quickly and Correctly.

- Correct transfer of a call requires the one who answers the telephone to get adequate information for correct referral.
- When a call must be transferred, the most desirable procedure is to tell the caller to whom he/she will be transferred, "I'll give you Ms Brown; she handles those matters; just a moment, please."
- Be sure you are transferring the caller to the proper person or department.

Handle the Instrument Correctly



- Do not hold the instrument with the mouthpiece cupped in the hand. Hold the instrument by the “handle.”
- Do not put the receiver on its side on the desk.
- Muffle the microphone with the palm of the hand, not the finger tips, if you need to make any vocal aside during the conversation.

Conversation Techniques

(1) Development of **CONFIDENCE** in handling even difficult telephone calls; (2) the recording of important points of a call; and (3) the use of good communication patterns. Assume and keep the initiative in conversations.

When you answer -

Your response, won't stop at, "No, he/she isn't here." It will extend to:

"He/she isn't here."



or

"May I help you?"

"May I have him/her call you?"

or

"Ms Brown is out of
message?"
the office."



"Shall I take a

or

"Perhaps Mr./Ms X can help you."

or

"Can someone else help you?"

Conversation Techniques

Acceptable Responses

What You Mean:	Tell the Caller:
"He/She is out."	"He/She is not in the office at the moment. Would you like to leave a message on his/her voicemail?"
"I don't know where he/she is."	"He/She has stepped out of the office. Would you like to leave a message on his/her voicemail?"
"He/She is in the men's/ladies room."	"He/She has stepped out of the office. Would you like to leave a message on his/her voicemail?"
"He/She hasn't come in yet."	"I expect him/her shortly. Would you like to leave a message on his/her voicemail?"
"She/He took the day off."	"She/He is out of the office for the day. Can someone else help you or would you like her/his voicemail?"
"He/She doesn't want to be disturbed."	"He/She is unavailable at the moment. Would you like to leave a message on his/her voicemail?"
"She is busy"	"She is unavailable at the moment. Would you like to leave a message on his/her voicemail?"

Conversation Techniques Acceptable Responses Cont'

To answer, lamely, a caller's question with, "No, I don't know," suggests what?

But to say, "No, I'm sorry I don't know, but..."

"Mr./Ms X may have an answer for that problem. Shall I transfer you to him/her."

or

"If you would like to 'hold' for a minute, I'll get Mr./Ms X to see if they have an answer for you."

These comments at least suggest to the caller that you are interested in trying to help.

Do you want the name of the caller? Then try: "May I tell him/her who called?"

"I'm sure Mr./Ms X would like to know who has called."

"When he/she returns, may I tell him/her who called?"

Conversation Techniques²⁰

When Leaving the Line

When you need to leave the line during a conversation:

Say how long it will take, and then:

- Ask your caller if he/she will hold the line, or if he/she would prefer that you take a message.
- “Check in” with your caller if you have to be away from the line for more than a minute, with “It will take me a few minutes more to find that information; do you wish to wait or shall I call you back?”
- Avoid saying, “Just a moment,” then leaving the line. Your caller may prefer to receive that information later than to wait out the time of your search!
- Get the Customer’s attention. To pick up the telephone and continue with, “its 361-698-1116,” will invariably bring a “what was that?” So.....
 - Thank him/her for waiting or apologize for taking more time than you had anticipated would be necessary.
 - Now that you have his/her attention again, give him/her the information.

Conversation Techniques

Ending the Call

1. Help your caller come to a close with a hint that your conversation has come to an end.
2. When you are listening:
Keep the initiative here, too. Whether you are waiting for that break in the conversation, or whether you are listening to your conversation partner's complete story.

Conversation Techniques

Closing the Call

When you are closing:

1. If you initiated the call, review the information details. Whatever the business may have been. Be sure that the details you have written down are correct.
2. If you have received the call, repeat to your caller the business of the call. Make certain that your caller has understood correctly what you have told them.

Conversation Techniques

Ending Prolonged Calls

A. When you wish to end a prolonged conversation:

The accepted rule accords the caller the prerogative of closing a conversation.

B. If you have placed the call:

Even if your partner in the conversation seems reluctant to close the contact, it is your privilege to end the tangent upon which the conversation has become launched by a polite, "Well, then, we will take care of that matter,"

or

"Thank you for your information,"

or

whatever appropriately refers to the original purpose of your call—

and then your polite "goodbye."

C. If you have received the call:

The tone of voice which conveys a kindly self-assurance is the key to making this comment turn the trick: "I've enjoyed talking with you. I wish I had more time to discuss this matter with you. Thank you for calling."

Conversation Techniques²⁴

Gathering Information



1. SUMMARIZE the business at the close of the call.
2. Have a pencil in hand when **you answer** that ring. Be ready to write as well as listen.
3. Record telephone calls.
4. Have a pencil in hand when **you place** a call. Write down names, dates, times, place, and items.

Suggestions:

Use your notes for letters or memos confirming conversations.

Avoid Verbal Barriers to Communication

We know that people resist being told they “have” to do anything!
Here are a few expressions to reflect upon:

NOT THIS

Are you indifferent?

“Hold on...”

“You’ll have to check w
Mr. X.

Are you arbitrary?

“You have to....

“You need to...

Are you tactless?

“Who’s calling?”

“What is your name?”

Are you casting reflections?

“I don’t know where he is.”

“He hasn’t come in yet.”

He’s still out to lunch.”

“



BUT THIS

“Do you mind waiting while I
check that for you?”

“Mr. X is handling that matter.
May I have him get in touch
with you?”

“Will you please ask Mr. Jones
to call Mr. B?”

“May I tell her who’s calling,
please?”

“May I ask your name?”

“Mr. X isn’t in the office just
now.”

“May I have him call you later?”

Voice Mail

Voicemail has many benefits and advantages when used properly. However, you should not hide behind voicemail.

Do:

- Make sure your message is polite, direct, and businesslike.
- Make sure your message can be understood clearly.
- Return telephone calls promptly

Do Not:

- Make crude comments or mention social references in your message (i.e. I'm unable to answer my phone because I'm out partying).
- Have music playing in the background.
- Use multiple people when recording the greeting.

Voicemail Greeting

- Be sure to record your own personal greeting; don't use the standard default greeting or have another person record your greeting.
- Write down what you want to say in your greeting and practice saying it a few times before recording.
- Include in your greeting your name and department so that people know they have reached the correct person.
- Your regular greeting should include your normal work hours.
- Use the attendant feature if available! This feature allows the caller to reach another person in your department from your voicemail.

Checking Messages and Returning Calls



- Check your messages daily and return messages within 24 hours.
- Reply, forward, or delete messages immediately.
- If you forward a message, be sure to explain to the person to whom you are forwarding the message why you are sending it to them.

Leaving a Voicemail Message for Another Person

When you have to leave a message for someone to return your telephone call, try to have the correct pronunciation of their name and make sure you state the following clearly:

- Speak clearly and slowly.
- Be sure to leave your name and extension number. It's best to say it at the beginning and end of your message.
- Keep messages short and to the point.
- Remember that you want to leave the person you are calling with a good impression of you.
- Leave the date and time you called in the message. Let the person know the best time to call you back.
- Cover one topic in one message; specify what you want the recipient to do.

More Etiquette Tips



Survival Tools

There are specific **vocabulary formulas** to use to **reduce the emotional impact** of difficult callers and methods that can turn a stressful encounter into a positive interaction.

One of the critical factors in successful telephone communication which bears repeating is – **voice tone**.



Proceed Cautiously

Choose the right word or phrase to send the best message.

Learn how to say "no" in a positive manner by subtracting "Not" Words and negative phrasing from your communication. The end result: callers who understand and accept your information more quickly.

Dealing With Difficult Callers

What you should do is:

- Listen without interrupting
- Gather the facts and make a note of them
- Take their details so you can get back to them
- Sympathize with them and offer to act as fast as you can
- Apologize if you have made the mistake
- Stay calm even though the caller is angry and possibly abusive.

Three Myths about Students/Callers

- 1. Students try to make things difficult.
- 2. Students like to complain.
- 3. Students expect the impossible.
- 4. Students are never satisfied.

16 Words and Phrases That Keep Students Cool

Hello!

Good morning!
Please.

Thank you.

I'm very sorry.
in
Excuse me.

You're welcome.
that for
May I help you?

I'm sorry to keep you waiting.
Thank you for waiting.
It was nice talking with you.
Is there anything else I can do for you?
Thank you for coming (or calling).
It's been a pleasure to serve you.
I'd be happy to do you.
We appreciate your business.

Are You Sure You're Understood?

- Check your presentation. Speak distinctly at a moderate pace, with enough volume to be heard clearly.
- Stay with your caller. Don't give important information when the caller doesn't appear to be listening.
- Use everyday language. When you must use a term callers may not understand, explain it.
- Repeat, or spell out, information.
- Ask for feedback.
- Encourage questions.

What To Do When You Make a Mistake

You can recover from blunders and be a winner. Here's how:

- Make things right. Your first responsibility is to correct the mistake.
- Apologize. When you make a mistake, you'll usually gain stature by apologizing in a direct way.
- Let the matter rest. One apology suffices.
- Learn more about operations. If you have to track down a goof, use the occasion to learn more about the intricacies of your department or campus operations.
- Ask if you can do something else. After resolving your mistake, ask if you can help in any other way.
- Let others know you've learned something. Assure those affected by your error that it won't happen again. Keep records.
- Keep a record of errors made, the causes, and their solutions. Review the list of mistakes to prevent their recurrence.

11 Most Frequent Caller Complaints

1. **"The telephone rings for a long time before it is answered."**

Try to answer calls within 3 rings.

2. **"They place me on hold for sometimes, it seems, hours."**

If you find yourself placing many calls on hold, write down the name of the caller and a brief description of what they are calling about.

11 Most Frequent Caller Complaints Cont'

3. **"The line is busy for hours it seems."**
Try to keep calls short.
4. **"They are very rude and get offensive when asked their full name or sometimes just won't give it."**
Try to stay pleasant.
5. **"They let me talk on and on only to realize that they're not the person I should be talking to."**
Politely interrupt the caller if you are unable to help them.

11 Most Frequent Caller Complaints Cont'

6. **"If I call the wrong department for help, they don't give me suggestions to where I should be calling, they just say, 'I don't know, not our department.'"**

Frequently, you will find that your number is similar to another department on campus. Rather than hanging up on a caller or saying you don't know, try to be helpful (within reason).

7. **"They don't clearly listen to my needs before they transfer me to the wrong person."**

Listen to the caller carefully!

8. **"Sometimes they disconnect me while transferring my call."**

Be careful when transferring a call.

11 Most Frequent Caller Complaints Cont'

9. **"They told me to call back, but never gave me a name or number or division to ask for."**
If you tell a caller to call back later, tell them which number to call.
10. **"The person says, 'Wait', and then talks to other co-workers without putting me on hold so that I can't hear their small talk."**
Use the hold button!
11. **"They answer with an aggravated voice, as if I disturbed them by calling."**
Remember that students are the reason there is a college.

Battling Burnout: Five Survival Tips

1. **Never take the work personally.** When students complain, they are not complaining about you personally.
2. **Don't take problems home.** Give your work complete attention while you are "on duty," but leave it there when you go home at night.
3. **Find ways to reduce stress.** Yes, it has become a cliché to recommend exercise to reduce stress.
4. **Get help from others.** Don't let yourself feel isolated and alone.
5. **Remember the "good news."** Students usually call with problems, not praise. But don't let that give you a warped perspective of the world.

Five Ways to Add Some Fun to Your Workday

- Work in a perk.
- Breathe. Several times during the day, pause for three slow, deep, relaxing breaths.
- Keep stress relievers on hand.
- Celebrate small victories.
- Review your successes at the end of the day. Think about what you did well.

10 Tips for Keeping Fresh and Cool Under Pressure

- Take brisk walks on your break.
- Post motivational quotes on your phone or around your workstation.
- Get more sleep at night.
- Take breaks with positive coworkers.
- 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.

At the End of the Day....

At the end of the day, spend a few moments reflecting On what you have accomplished. Tally up the good experiences against the bad.

Sure, there are always angry students and those you can never please.

Because you are a professional, it's natural to remember and be concerned about the negative student contacts you experience.

You deserve to pat yourself on the back!

Thank
you!

