

Packet

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COMMUNICATING WITH THE CALLER:

After the introduction, it will be time to answer questions and/or direct the caller to the correct department or person. It is recommended that you keep a notepad and pen near the phone. This will allow you to write information quickly so you don't forget. When addressing the caller be professional. Use the person's title and last name such as Mr. Jones or Mrs. Jones. Also, don't use slang or informal language when speaking. Avoid using words like "Yep" or "Nah."



Be a good listener. Focus on the phone call and give the caller your undivided attention. Avoid distractions and doing other things when speaking on the phone. Also, make sure to speak clearly and loud enough. This means you should not be eating, drinking, or chewing gum when on the phone. Doing so will get in the way of clarity and come across as rude.

Remember, the importance of putting a smile on your face when on the phone. Even if you aren't in a good mood, putting a smile on your face and even faking it can help you sound more pleasant. You will in counter rude and angry people on the phone, but you need to remain calm and professional. It is your job to be professional and try to assist the caller. Often, by remaining calm, and helpful you will help deescalate a person's anger.

TAKING A MESSAGE:

If the caller wants to talk to a person who is not available, ask the caller if you can take a message or send to voice mail. Make sure to obtain the caller's number and the purpose of their call. Also, ensure them you will pass the message on to the correct person and thank them for the call.

Answer each question with a complete sentence on a separate piece of paper.

13. What should you keep by the phone?

14. How should you address a caller?

15. What type of language should you avoid using on the phone?

16. When speaking on the phone to a caller, what should you not be doing?

17. What will remaining calm and positive help you do with an angry caller?

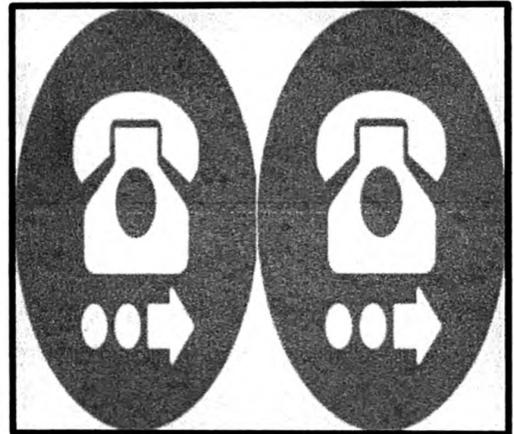
18. If you are going to take a message what do you want to ensure the caller of?

PLACING THE CALLER ON HOLD:

Sometimes, you will need to try and find the person the caller desires to talk with or you don't have an answer to their question and need to ask a co-worker for the answer. Therefore, you will need to place the caller on hold. If you need to place the caller on hold, politely ask them if you can place them on hold while you find out the answer or locate the person. After, you come back to the phone, thank them for holding. Make sure not to leave someone on hold for longer than a few minutes. If you are having difficulty finding the answer to a question, ask the caller if someone from the business could call them back at a later time with the answer. If can't locate the person the caller would like to talk with, ask to take message.

TRANSFERRING A CALL:

Most office systems will have a way to transfer call. It is important to learn how the system operates at your work so you don't accidentally hang-up on the caller. If someone is calling the wrong department or looking for a person that has an extension, you will most likely need to transfer the caller. However, before transferring a caller, ask them if it is okay to transfer them and thank them for calling.



ENDING A PHONE CALL:

It is important to end all phone calls professionally. After you have assisted the caller, politely, say "*Thank you*" and "*Good bye.*" There should not be any confusion that the conversation has ended. Allow the caller to hang up first, before you hang-up.

Answer each question with a complete sentence on a separate piece of paper.

- 19. If you need to place a caller on hold, what do you want to say?**
- 20. For how long should you keep callers on hold?**
- 21. After placing a caller on hold, when you come back on the phone, what should you say?**
- 22. Why should you learn how to operate the phone system at work?**
- 23. Before transferring a caller, what should you ask them?**
- 24. How should end all phone calls?**
- 25. When ending a phone call, what should you wait for?**

Assessment

Answering and Speaking on the Phone

Name _____

Per. _____ Date: _____

Select the best answer:

1. It is important to answer the telephone at work

- a. only if nobody wants to answer it.
- b. before the 5th ring.
- c. before the 3rd ring.
- d. only when you feel like answering it.

2. Before speaking, it is important to make sure

- a. the phone is to your ear and mouth and you smile.
- b. you chew a piece a gum.
- c. begin working on something else.
- d. All of the above.

3. When first speaking to the caller, you want to start off

- a. asking why they are calling.
- b. saying, "You can't help them."
- c. with a polite greeting, such as "hello."
- d. None of the above.

4. When first speaking with the caller, it is important to

- a. never tell them your name
- b. inform them of the company they have called and your first name.
- c. your first, last name, and today's date.
- d. stay silent until they speak.

5. When addressing the caller on the phone

- a. always use their first name.
- b. use a title and their last name only.
- c. use terms or names that you are comfortable with.
- d. it doesn't matter what you use.

6. When speaking with the caller

- a. don't chew gum, eat, or drink.
- b. avoid distractions.
- c. focus on the caller.
- d. All of the above.

7. If a caller wants to leave a message,

- a. make sure to get their name, call back number, purpose, and ensure them you will pass the message on.
- b. tell them it is better they call back later.
- c. pretend to take a message.
- d. place them on hold until you have time to write a message.

8. If you need to place the caller on hold,

- a. tell them to wait.
- b. just place them on hold without telling them.
- c. politely ask them if you can place them on hold.
- d. keep them on hold until they hang up.

9. When transferring a caller to another person or department,

- a. don't mention that you need to transfer them.
- b. only transfer the caller if they are polite.
- c. ask the caller permission to transfer them.
- d. never transfer phone calls.

10. When ending all phone calls at work,

- a. be professional.
- b. say "thank you" and "good bye."
- c. wait until the caller hangs up before you hang up.
- d. All of the above.

True or False

11. _____ Answering and talking on the phone is a soft skill that should be learned to ensure success at work.

12. _____ A smiling person answering a phone call will come across in a positive way when speaking with a caller.

13. _____ It is okay to be rude occasionally on the phone because employers are not concerned about their company's image.

14. _____ When at new a job, in order to assist you in answering the phone properly, it is helpful to develop a written script on what to say.

15. _____ It is recommended that you keep a notepad and pen near the phone.

16. _____ No matter where you work and in what department you work in, the introduction to the caller will always be exactly the same.

17. _____ It is okay to use slang or informal language when speaking on the phone.

18. Pretend you are working for Blue Star Corporation and you answer the telephone. How would you answer the phone? What would your greeting and introduction be to the caller? Write the script below: