

# Telephone Etiquette Guide

## Answering Calls for Your Department

1. Answer promptly (before the third ring if possible).
2. Before picking up the receiver, discontinue any other conversation or activity such as eating, chewing gum, typing, etc. that can be heard by the calling party.
3. Speak clearly and distinctly in a pleasant tone of voice.
4. Use hold button when leaving the line so that the caller does not accidentally hear conversations being held nearby.
5. When transferring a call, be sure to explain to the caller that you are doing so and where you are transferring them.
6. Remember that you may be the first and only contact a person may have with your department, and that first impression will stay with the caller long after the call is completed.
7. If the caller has reached the wrong department, be courteous. Sometimes they have been transferred all over with a simple question. If possible, attempt to find out where they should call/to whom they should speak. They will greatly appreciate it.
8. When the called party is not in, the following responses should be used both to protect the privacy of the office staff and to give a more tactful response:

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

## Transferring Calls

### **To transfer a call:**

1. Let the caller know where you are transferring them.
2. Press the Transfer key.
3. Dial the extension where you are transferring them.
4. Press the Transfer key again. You're done.

### **To announce a call:**

1. Find out the name of the caller and ask what it is regarding. (Why they are calling).
2. Tell the caller to please hold for a moment.
3. Press the Transfer key.
4. Dial the extension of the person the caller wants to speak to.
5. Wait for the person to answer.
6. Tell the person who is calling.
7. a) If the person accepts the call, press the Transfer key.  
b) If the person asks you to take a message, press the Resume key. From there you can take a paper message or transfer directly to a person's voicemail (see below instructions).

### **To transfer a call directly to voicemail (without ringing):**

1. Tell the caller you are transferring them to (name)'s voicemail.
2. Press the Transfer key.
3. Dial the extension of the person you are transferring them to (i.e. Jane Smith at x9999).
4. Press the Transfer key.

### **Good Telephone Procedures**

Remember that you are representing your department and etiquette is very important. Using phrases such as "thank you" and "please" are essential in displaying a professional atmosphere. {You can tailor this section for your department's needs}

- Make sure to answer before the third ring.
  - Examples of greetings can be: "(Division Name), may I help you?" OR "Good morning"...you get the idea. Use a greeting that is going to give the caller the impression that we are in fact professional and pleasant.
- If you are currently on one line and another line rings:
  - Ask the first caller, "May I place you on hold for a moment?"
  - Place caller on hold.
  - Answer the ringing line saying, "[Division Name]—can you hold for a moment please?"
  - Wait for them to say "yes."
  - Place second caller on hold.
  - Return to first caller and complete the call.
  - Go back to the second caller.
  - Say, "Thank you for holding, how may I help you?"

**NOTE:** Sometimes you will have many lines ringing all at once. Please remember to write down the names of the calls holding so you avoid asking who the caller is holding for more than once.

### **Screening Calls**

Answer the phone by saying: "[Division Name], how may I help you?"

- If the caller asks to speak to the director (for example), ask "May I tell him/her who is calling?"
  - Ask the caller "What is this in regard to?" (if appropriate)
  - Press Transfer key and the extension.
  - Wait for the person to answer.
  - Announce the name of the caller.
  - Wait for a response as to whether the call will be taken.

- If the called party wishes to take the call, press the Transfer key again.
- If the calling party does not wish to take the call, press the Resume key. SAY:  
" \_\_\_\_\_ is out of the office, may I take a message or would you like his/her voicemail?"

### **Taking Messages**

1. Be prepared with pen and message slip when you answer the phone.
2. When taking messages be sure to ask for:
  1. Caller's name (asking the caller for correct spelling.)
  2. Caller's phone number and/or extension (including area code)
  3. What the call is regarding.
3. Repeat the message to the caller.
4. Be sure to fill in the date, time, and your initials.
5. Place the message slip in the called party's inbox or in a conspicuous place in their office, such as their chair.
6. Don't forget that you can transfer them to voicemail instead of taking a paper message, but don't forget to ask, "Would you like me to transfer you to \_\_\_\_\_'s voicemail?" Do not assume that the caller would rather go to voicemail. Always ask first.

### **Handling Rude or Impatient Callers**

1. Stay calm. Try to remain diplomatic and polite. Getting angry will only make them angrier.
2. Always show willingness to resolve the problem or conflict.
3. Try to think like the caller. Remember, their problems and concerns are important.
4. Non-supervisory: Offer to have your supervisor talk to the caller or call him/her back if the caller persists.

**Supervisor:** Be willing to handle irate callers. Speak slowly and calmly. Be firm with your answers, but understanding. Sometimes the irate caller just wants someone in a supervisory capacity to listen to their story even if you are unable to help them.

### **Good Telephone Habits for Everyone**

Whether answering the phone or making phone calls, using the proper etiquette is a must in order to maintain a certain level of professionalism. Proper etiquette leaves callers with a favorable impression of you, your department, and your organization in general. You'll also find that others treat you with more respect and are willing to go out of their way to assist you if you use the proper etiquette.

### **Answering Your Phone**

1. Answer your calls within three rings (if possible).
2. Always identify yourself when you answer the phone: "This is \_\_\_\_\_."
3. Speak in a pleasant tone of voice - the caller will appreciate it.
4. Learn to listen actively and listen to others without interrupting.
5. When you are out of the office or away from your desk for more than a few minutes, forward your phone to voicemail.
6. Use the hold button when leaving a line so that the caller does not accidentally overhear conversations being held nearby.

7. If the caller has reached a wrong number, be courteous. Sometimes a caller is transferred all over with a simple question and the caller gets frustrated. If possible, take the time to find out where they should be calling or to whom they should be speaking.

### **Making Calls**

1. When you call someone and they answer the phone, do not say "Who am I speaking with?" without first identifying yourself: "This is \_\_\_\_\_. To whom am I speaking?"
2. Always know and state the purpose of the communication.
3. When you reach a wrong number, don't argue with the person who answered the call or keep them on the line. Say: "I'm sorry, I must have the wrong number. Please excuse the interruption." And then hang up.
4. If you told a person you would call at a certain time, call them as you promised. If you need to delay the conversation, call to postpone it, but do not make the other person wait around for your call.
5. If you don't leave a number or message for someone to call you back, don't become angry if they are not available when you call again.

Keep in mind the Golden Rule when it comes to phone etiquette. Don't make people dread having to answer their phone or call your department.

### **How to End Conversations Gracefully**

There are several ways that you can end a long phone call without making up a story or sounding rude:

1. Leave the conversation open.
2. Promise to finish your discussion at another time.
3. End on an "up" note.
4. Tell the person how much you've enjoyed speaking with him/her.

As long as you are honest and polite with the other person, you shouldn't have any problems getting off the phone and onto something else.

### **Voicemail Etiquette**

Voicemail has many benefits and advantages when used properly. However, you should not hide behind voicemail. If callers constantly reach your voicemail instead of you, they will suspect that you are avoiding calls. Here are a few tips on such things as greetings and responding to voicemail.

### **Voicemail Greeting**

1. Be sure to record your own personal greeting; don't use the standard default greeting or have another person record your greeting. People tend to feel that they have already lost the personal communication touch because of voicemail. If a female voice says that "Joe Smith is not available", the caller will not be convinced that you listen to your voicemail.
2. Write down what you want to say in your greeting and practice saying it a few times before recording. Even if the greeting sounds like you are reading it, it will ensure that you don't spend as much time trying to record it "just right."
3. Include in your greeting your name and department so that people know they have reached the correct person.

4. Your regular greeting should include your normal work hours. If you know that you will be on vacation for a few days or leaving the office early or have different hours temporarily, you should record an alternate greeting to let callers know this. Callers will know that they cannot expect a callback for a few hours or a few days.
5. Use the attendant feature. This feature allows the caller to reach another person in your department from your voicemail. For example, if you were out of the office on a Thursday and a caller needed an answer immediately, the caller could dial 0 while listening to your voicemail message and be transferred to someone else in your department.
6. When you leave for the day or will be away from your desk for an extended period of time, forward your line to your voicemail using the call forward feature as a courtesy to your callers. Call forwarding means that your callers don't have to wait through an entire ring cycle (12 seconds/3 rings) before leaving a voicemail message for you.

### **Checking Messages and Returning Calls**

1. Check your messages daily and return messages within 24 hours. If it will take longer than 24 hours, call the person and advise him/her. Callers should feel comfortable that you are checking your voicemail daily.
2. Reply, forward, or delete messages immediately. Keep your mailbox clean. Saved messages kept longer than a week take up needless space in your mailbox since you are only allowed 20 messages total in your mailbox, including saved messages.
3. 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**

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