

Telephone Etiquette

'Treat people as you would wish to be treated'

Answering the call

- Introduction
 - Your full name
 - Your department and organisation
- How may I help you?

Taking a message

- Offer to take a message
- Write it down
- Ask them to spell any unusual words
- Ask them the nature of the call
- Ask them the best time to call back
- Manage their expectation – Let them know when the recipient of the message is able to call them back (could have very busy schedule)
- Record the date and time of the call

Passing on a message

- Date and time
- Correct spelling of the name – If necessary spell the name out
- Nature of the message
- Convey mood of the caller (be careful of bias and self fulfilling factor)
- Convey the time that the caller is expecting a call back

Leaving a message on an answer-phone

- Consider confidentiality
- Leave your name, spelling it out slowly and precisely
- Leave the date and time
- Leave a message and the action you want the caller to take (or convey the action you will be taking)

Putting someone on hold

- Ensure they are put on hold and cannot hear your conversation
- Ask if they are happy to be put on hold/or be direct
- Tell the customer how long they are likely to wait/if necessary tell them that you will call back (and when you will call back)
- Let the customer know exactly what you are going to do i.e. track down the person who can help them or find the relevant information (it is so important to show the caller that you are taking ownership)
- When you return to the phone 'thank them for waiting'

Ending a call

- Ask 'Is there anything else I can help you with?'
- Thank them for the call/time etc