Telephone Etiquette

GLOBAL EDULINK

Table of Contents

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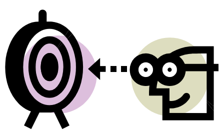
Module One: Getting Started

In this growing electronic age, we often forget how important it can be to have simple telephone etiquette. Outside the realm of texting and emails, many people still use the telephone as a primary source of communication. Knowing the proper etiquette and procedures for speaking with someone on the telephone can show a great deal of professionalism as well as social knowledge.

Workshop Objectives



Research has consistently demonstrated that when clear goals are associated with learning, it occurs more easily and rapidly. With that in mind, let's review our goals for today.

At the end of this workshop, participants should be able to:

- Recognize the different aspects of telephone language
- Properly handle inbound/outbound calls
- Know how to handle angry or rude callers
- Learn to receive and send phone messages
- Know different methods of employee training

Module Two: Aspects of Phone Etiquette

Many people do not realize they have little or no phone etiquette. When they recognize this, they are often unsure about where to start. One of the first steps to gaining or improving a person's phone etiquette is to know the different aspects of it, such as phrasing and listening skills. Learning this knowledge can be a great starter tool for many people and can help them feel more confident on the phone right away.

Phrasing

When speaking on the telephone, a different set of phrasing is used instead of our everyday talking phrases. Using a more professional group of phrasing portrays to the caller a sense of confidence and a sense that you are there to help them. Using phrases such "Could you", "May I?", "Please", and "Thank you" can help the person on the other end of the line feel more comfortable and feel more at ease with your politeness. Important phrasing sections include introductions, transitions and even call conclusions. Although some of the phrasing can seem uncomfortable at first, but with practice, they can become as natural as our everyday speech.

Examples:

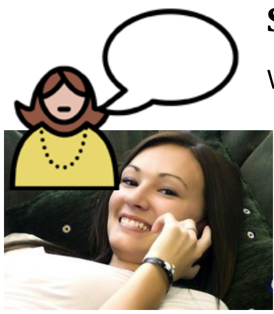
- "How may I help you?"
- "Thank you for calling."
- "Could you repeat that name again?"
- "One moment while I transfer you."
- "May I take a message?"

Tone of Voice

The tone of voice in which we speak can portray a variety of emotions and feelings. When we're sad or angry our voice can lower in tone; and when we're happy or excited it can raise higher. It is generally recommended that when we speak on the telephone, we should speak in our normal tone of voice, if not a few decimals higher. Lower tones of voice can imply sarcasm or disinterest. The speaker should never speak in monotone, which can sound bored and make the caller feel as though the speaker is not sincere. When possible, use inflection in your voice to help stress important points and give the caller verbal hints as to where the conversation is going.

Tips:

- Speak in a normal speaking tone of voice (or higher)
- Avoid lower tones or monotones
- Use inflection when possible



Speaking Clearly

When speaking on the telephone, the two callers cannot read lips or take notice of any sort of body language, so it's important to speak clearly and in a professional tone of voice. Do not speak too quickly, since it can cause your words to sound jumbled or rushed. However, speaking too slowly can make words sound distorted and can mislead the caller from what is trying to be said. As you speak, articulate your words and ensure not to slur any sounds together. When you are finished speaking, pause periodically for signs that the caller has heard and understood you, such as answering the question or a simple "Mm hmm". If in the end they did not catch what you said, calmly repeat the information and try again.

Tips:

- Take deep breaths before each phone call
- Speak slowly – do not rush your phrases
- Pause for understanding from the caller
- Repeat words if necessary

Listen to the Caller

With a telephone in our hand, we can often feel a sense of power and can feel the urge to perform all of the speaking – and forget how to listen. However, we forget that the purpose of the call is the person calling us to begin with. After you give your introduction, pause for a moment to listen for the caller to begin speaking and identify the purpose of their call. Allow the caller to finish speaking without interruptions. Focus on what the caller needs and what they are wanting. When they are finished, reaffirm what they are wanting, which is sometimes referred to as active listening. Let the caller know what you can do for them and how you can help with their needs.

Case Study

Robert was taking calls for the clinic one morning. When the phone rang, he picked up the phone:

"Thank you for calling Dr. Smith's office. My name is Robert. How may I help you today?"

The caller sounded upset and began to explain how he was waiting on a prescription from the doctor and still had not received it. Robert made sure that he did not interrupt the patient and waited for him to finish speaking. When Robert spoke again, he spoke in a calm and reassuring tone of voice. He told the patient that he would be able to connect him with the doctor's nurse to help him with that. Robert waited for the caller to acknowledge what he said before proceeding to connect him to the nurse's extension.

Module Two: Review Questions

1. What is one benefit of using correct phrasing on a telephone call?

    a) Calls sound professional.
    b) The call is completed quicker.
    c) The customer is not bored.
    d) The operator can persuade the client better.

2. Which of the following is an example of correct phrasing?

    a) "What do you want today"
    b) "Where can I transfer you to?"
    c) "How may I help you?"
    d) "Who do you want to speak to?"

3. What is one tool that can be used to control tone?

    a) Volume.
    b) Semantics.
    c) Deep breathing.
    d) Inflection.

4. Which of the following should not be used on a telephone call?

    a) Soft tones.
    b) Monotones.
    c) Inflection.
    d) Raised tones.

5. One technique that can help the operator speak clearly is to do what?

    a) Take deep breaths before each call.
    b) Hang up if they make a mistake.
    c) Speak loudly into the receiver.
    d) Talk more often during the day for practice.

6. Which of the following should be avoided on the telephone?

    a) Soft tones.
    b) Steady breathing.
    c) Clearly pronounce words.
    d) "Um's" or "Uh's".

7. What is one tool that can be used to improve listening skills?

    a) Increasing the telephone volume.
    b) Active listening technique.
    c) Shortening the length of the call.
    d) Writing on sticky notes.

8. After their introduction, the operator should do what?

    a) Continue with the call.
    b) Offer to transfer the caller to someone else.
    c) Pause for a response from the customer.
    d) Change their tone.

9. Why was the caller angry with the doctor's office?

    a) He was waiting on a prescription.
    b) He had missed his appointment.
    c) He wasn't feeling well.
    d) He needed an excuse to go back to work.

10. How did Robert offer to resolve the caller's problem?

    a) He made the caller an appointment.
    b) He told him to call back later.
    c) He connected the caller to the nurse line.
    d) He called the pharmacy.

> *The art of communication is the language of leadership.*
>
> **James Humes**

Module Three: Using Proper Phone Language

Every environment we enter requires a different form of 'language'. For instance, we wouldn't enter a team meeting with the same type of language we may use in the break room. The same is true for the telephone. Telephone language is different than our everyday language and can take some time to get used to its flow. But with the right tools, it can be easy to adapt in no time.

Please and Thank You

Using good etiquette is a way to show respect and consideration to those we interact with. Some of the basic essentials of proper etiquette are phrases such as "Please" and "Thank you". When asking the caller for something, such as their name or account number, always follow with "please". After the customer has given something to you or says something polite, follow with "thank you" to show your appreciation for their help. Using "Please" and "Thank you" when speaking with a customer allows the operator to remain professional while still showing courtesy and respect.

Examples:

- "May I have your name, please?"
- "Please hold for one moment, Mr. Smith."
- "Thank you for your time today."

Do Not Use Slang

Slang is typically defined as a type of language that consists of words and phrases that are regarded as very informal and are used in everyday speech. Common examples include “Yeah”, “Y’all”, “I guess so”, and “ain’t”. Slang is not appropriate to use on the telephone and should not be used, even if we know the caller. Slang language implies inconsideration and disrespect to the caller and can make them feel as though you do not want take your time to help them. It is important to always use professional and courteous language in order to convey to the caller that you are there to help and can get the job done.

Avoid Using the Term “You”

When speaking with someone on the telephone, it can be easy to get lost in speaking with the caller and letting them know what they may need to do on their end. However, it is important for the operator to avoid using the term “you” excessively. When we continuously use the term ‘you’, in reference to the caller, it sends the message that everything is their responsibility and that the person on the other end of the line is not there to help them. If we continuously tell them they have to complete a task before we can help them, the company not only looks unprofessional, but unwilling to do business with them.

Avoid phrases such as:

- “You will need to call back tomorrow.”
- “You have to take your bill to the other office.”
- “I need you to come into the office for that.”

Emphasize What You Can Do, Not What You Can't

When we are speaking with someone on the phone, for any reason, it can be hard to communicate what the caller wants or needs from the operator. Sometimes the operator is quick to tell the caller that they cannot complete a certain task or that they cannot help them at all – but this type of attitude does not build relationships. Flatly telling someone you cannot do anything for them shuts the door on negotiations and portrays a negative light on the company. Instead, emphasize what you can do for the caller. Offer 'favors' or alternate tasks you can do for them to help them get what they need. If you're genuinely not able to answer their questions or do something for them, it's alright to let them know that, but offer an alternative action for them, such as finding someone who can help.

Examples:

- "I can help you with that."
- "I'll be happy to transfer you to the department."
- "I can take a message if you'd like."
- "I don't know the answer, but let me find someone that does."

Case Study

Andy and Kim were reviewing some telephone etiquette training measures before their next employee meeting. Andy began reviewing some of the company's proper scripting techniques while Kim reviewed some basic telephone speaking terms. Andy asked Kim for some ideas on how to make the company scripted sound less 'scripted'. Kim looked over the material and suggested adding various 'please' and 'thank you' phrases, since it would make Andy sound friendlier when speaking. Kim made a copy of the script and decided to practice it out loud with Andy. She made several notes of remembering to eliminate the slang words 'Ya' and 'gonna' from her speech. Before they stopped for the day, Andy suggested they print a copy of the extensions for other departments, in case a caller needed to be transferred.

"After all, if I can't help them, I'll find somebody that will." Andy said.

Module Three: Review Questions

1. When is the proper time to say ‘please’ on a telephone call?

    a) When you ask for something from the client.
    b) When the client gives you information.
    c) After the introduction.
    d) Before the closing phrase.

2. When is the proper time to say ‘thank you’ on a telephone call?

    a) After the introduction.
    b) When the client gives you information.
    c) After the closing phrase.
    d) When you ask for information from the client.

3. Which of the following is considered slang term?

    a) “You’re welcome.”
    b) “How are you?”
    c) “Yes ma’am.”
    d) “Y’all”.

4. Why is slang inappropriate to use on the telephone?

    a) It is too complicated.
    b) It can sound too snobbish.
    c) It is too informal.
    d) It can mislead the caller.

5. Using the term “You” on a telephone call implies what from the operator?

    a) A desire for casual conversation.
    b) A lack of responsibility.
    c) An attempt to speak directly to the caller.
    d) An acceptance of responsibility.

6. Which of the following should not be used on the telephone?

    a) “Could you repeat that information?”
    b) “Would you mind holding for a moment?”
    c) “Will you resend the information, please?”
    d) “You have to come back tomorrow.”

7. When we tell callers what we can't do for them, it can hinder what?

   a) Building relationships.
   b) Hiring more employees.
   c) Calling a larger number of clients.
   d) Employee sales skills.

8. What should the operator do if they cannot do what the caller asks?

   a) Find a way to do what they ask.
   b) Find someone that can do it for them.
   c) Offer another option.
   d) Do nothing at all.

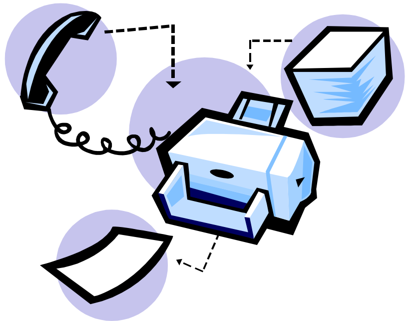
9. What was one aspect of telephone etiquette that Kim wanted to improve?

   a) Eliminate slang words.
   b) Boost her confidence.
   c) Increase her speaking volume.
   d) Say the caller's name more often.

10. What tool did Andy believe would be helpful when assisting callers?

   a) A list of manager phone numbers.
   b) A list of excuses to give the caller when he could not help them.
   c) A list of alternate options he could offer the caller.
   d) A list of department extensions.

Module Four: Eliminate Phone Distractions



Distractions can be very common in an office environment. Since employees are not alone or isolated, we learn to adapt to the sounds of other people in the room, telephones or fax machines ringing or even the occasional visitor to our work station. However, if we let these distractions hinder our telephone etiquette, it will cause us to sound unprepared and unprofessional.

Avoid Eating or Drinking

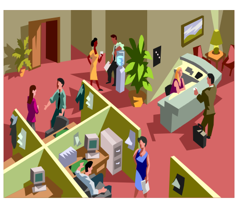
It is a common practice to have something at our desk to sip on or snack on during the day. However, this food and drink should not get in the way of your telephone calls. When someone calls in, be sure to finish chewing/drinking before picking up the phone so your voice is clear and residue free. When you are making a call, do not snack or drink while waiting for the other person to pick up. It never fails that the other party will pick up the line in the middle of your chewing/gulping.

Eating and drinking while on the phone not only distorts our telephone etiquette, but it can also distract us from the task at hand. It's difficult to focus on the caller when we are trying to find the lid to our drink or attempting to wipe our hands of sticky residue from our snack. If possible, keep any food and drinks in a drawer or cabinet until ready to consume them, such as between making calls or when you have a few minutes between incoming calls. But once a call is made/comes to your line, remove the food to somewhere out of sight until you have finished.

Minimize Multi-Tasking

Multi-tasking can be a great tool to have in any office. After all, it's helpful to be able to fill out a form while researching new meeting topics on the internet. However, when speaking on the telephone, less multi-tasking is actually better. Although we are capable of multi-tasking in many different areas while on the phone, it is better to minimize these tasks in order to better provide the caller with our attention and courtesy. When we multi-task, we are dividing our attention among several different areas, which, in reality, doesn't allow us to focus on any area of importance. The customer on the other end of the telephone line requires a great deal of devotion and needs to know that they have our attention, and not only parts of it. It is acceptable to have tools available to you while speaking on the telephone, such as looking for the caller's information in a computer database or completing a hand-written form for them while they speak. But if it does not pertain to the present call or the current caller, put it aside until later.

Remove Office Distractions

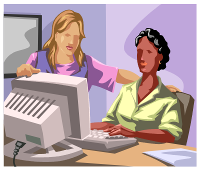


Sometimes distractions are all around us and we may not even be aware of it. Office distractions are a common source of our attention stealers and can include simple items such as personal photos, piles of paperwork on our desk, the nearby copy machine or even a recent memo/email hanging on our wall. While some of these items may be helpful to us, such as printed memos or recent paperwork, they can become a distraction when trying to have a conversation over the phone. When speaking on the phone, our attention should be focused on the caller, but seeing random paperwork or hearing the copy machine react can cause a knee-jerk reaction to remember a task we haven't completed or a project we still need to work on, thus taking attention away from the caller. Before you begin taking or making phone calls, take an inventory of your desk and the area around you. Remove any items that can distract you until you are ready to handle them so that they do not grab your attention before then.

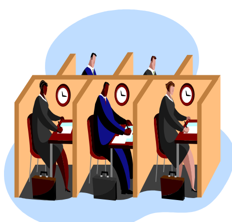
Common office distractions include:

- Personal photos or artifacts
- Various paperwork out on the desk
- Memos or sticky notes
- Malfunctioning office equipment (i.e. office chairs, copy machine, computers, etc.)

Do Not Let Others Interrupt You



When we work in an office environment, it's not uncommon to have coworkers around our workstation. Sometimes our coworker is in the same cubicle as we are! This in itself can be a distraction. But the problem with coworkers is that there are always those that want to stop at your cubicle to ask lots of questions or want to chat on their way to the printer, which can distract you. Making and taking telephone calls requires our full attention, and allowing other people to distract us from this not only causes us to lose our focus, but it can make the customer feel less important or even ignored. When a coworker comes by your desk for any reason, do not give them your attention. If you must interact, look them in the eyes, smile, and return to your phone call. This gives them the message that you are busy with a caller and cannot talk at the moment. If they come by again later or if you see them in the office, tell them you're sorry you weren't available but had an important call to tend to and catch up on what they needed.



Case Study

Jeremy and Doug shared a cubicle in a busy office. One day, Jeremy found Doug very frustrated and was having trouble making his regular sales telephone calls. Jeremy asked Doug what kind of problem he was having today. Doug confided in Jeremy that he was having trouble concentrating on his sales calls and would often lose the customer during the call. Doug said he felt something kept distracting him, but wasn't sure what. Jeremy reviewed Doug's scripting and pitches, but didn't find a problem. However, when he looked at Doug's work area, he could see where he could get distracted. Jeremy advised Doug to move his family photos to a higher shelf and condense the amount of sticky notes he had posted on the walls. Lastly, Jeremy suggested for Doug to reduce the amount of tasks he tries to accomplish on a call. "Give the caller your full attention and focus on completing their task", Jeremy said. With these helpful tips and suggestions, Doug felt as though he was ready to try his calls again and work toward being less distracted from the customer.

Module Four: Review Questions

1. Why should operators refrain from eating/drinking while on the telephone?

   a) It can make them hungrier.
   b) The callers can hear it.
   c) They will have to share with other operators.
   d) The callers will want to know what they are having.

2. To help minimize distractions, food/drink should be kept where?

   a) On the desk.
   b) Next to the computer.
   c) In a drawer or cabinet.
   d) Next to the telephone.

3. Multi-tasking can cause us to do what while on the telephone?

   a) Lose focus.
   b) Increase speed.
   c) Reduce errors.
   d) Gain productivity.

4. What is one way to minimize multi-tasking?

   a) Complete a large number of tasks before lunch.
   b) Put all unfinished work on top of the desk.
   c) Make a list of everything you want to accomplish.
   d) Remove excess work from the desk area.

5. Which of the following can be considered an office distraction?

   a) Personal photos.
   b) Sticky notes.
   c) Loose paperwork.
   d) All of the above.

6. What is one way to remove office distractions?

   a) Place all personal items in one area of the desk.
   b) Remove excess paperwork.
   c) Hang all sticky notes in a neat row.
   d) Add colorful labels to all paperwork files.

7. When our coworkers interrupt our calls, it can cause us to do what?

   a) Gain a few minutes for a break.
   b) Quickly transfer the call to someone else.
   c) Rethink why we called this client again.
   d) Lose focus with the client.

8. If a coworker comes by your desk while you are on the telephone, what should you do?

   a) Place the caller on hold.
   b) Write a message on a notepad for them.
   c) Ignore them.
   d) Inform the caller you will call them back.

9. What was Doug having trouble with in the office?

   a) He was not completing his sales calls.
   b) He was feeling sick.
   c) He wanted a raise.
   d) He was unable to access a file on the computer.

10. What was one suggestion Jeremy offered Doug?

    a) Transfer to another department.
    b) Ask a coworker to help him with his work.
    c) Make more calls to make up for the lost ones.
    d) Minimize the number of sticky notes he had.

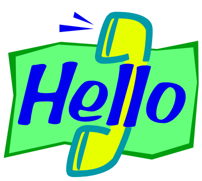
Good things happen when you meet strangers.

Yo-Yo Ma

Module Five: Inbound Calls

For many companies, inbound calls are a major part of the business. Customer call into the company for orders, consultations and even seeking general information. Inbound calls can seem intimidating at times since many times we don't know who is on the other end of the line. But knowing the right tools, such as a proper greeting and key phrases, can help the telephone operator through any situation.

Avoid Long Greeting Messages



For inbound calls, every company has their own set of greetings or scripting to use when they answer the phone. A good greeting typically includes a salutation, the company name and the operator's name. This lets the caller know where they are calling and who they are speaking to. However, some individuals like to adlib some parts, which can be helpful at times, but can also cause a lengthy greeting message. Long greeting messages may seem as though they are offering information to the caller, but instead they can deter interest and cause the caller to lose interest before the operator has a chance to help them. Generally, an inbound greeting should last between 5-10 seconds. After this time frame, the caller begins to lose focus and interest.

Introduce Yourself

When a person calls into your office, they may not necessarily know who or where they are speaking to. It is important for the operator to find some form of introduction to use with each caller. Every company has something different, but common examples include

"Thank you for calling _________, my name is Jane. How may I help you?"

An introduction should identify where the caller is calling to and who they are speaking with in that location. This type of introduction not only welcomes the caller to the company, but it also lets them know who is there to help them and invites them to get right to their request.

Focus on Their Needs

One of the most important aspects of business is to maintain its customers, and one of the best ways to do that is to focus on the customer's needs. Inbound calls allow patients to call into the company and reach out for help and assistance. So when a customer calls into your line, take the time to focus your attention on answering the call. Focus on what the caller is asking for and what sort of help they need. The caller may speak fast and have a long line of requests or even demands, but the key is listening for what they really want from the call and start from there.

Be Patient

Inbound calls can be lengthy and tiresome for the operator. In these calls, the client is calling into the company and will start making requests right away. Sometimes they can begin talking as soon as they hear a live person on the other end of the line. It is important for the operator to be patient with the caller and be sure to take the time listen for what the caller is really wanting. Never become pushy or pressure the caller to make a decision or state their purpose for calling. Some calming tips include taking deep breaths or silent counting exercises. Keeping your cool while still being able to assist the caller is a great exercise in patience. This will not only reflect well on you, but for the company as well.

Case Study

Sandra was training one of the newly hired employees, Elliott, on taking inbound calls in the office. She first reviewed the proper greeting messages and how the employee should introduce themselves. Sandra advised Elliott that he could say the greeting in a way that he was comfortable, but to make sure it wasn't too long-winded or wordy. As Elliott took notes, Sandra reminded him that one of the most important parts of the phone call was to focus on the customer's needs and remain patient with them at all times. Elliott knew he had a problem staying patient with people, and asked Sandra what she uses to stay patient with her callers. Sandra shared some of her favorite exercises, such as using deep breathing and counting backwards from 100, and told Elliott that in time he will learn different patience exercises that work for him.

Module Five: Review Questions

1. How long does a typical inbound greeting last?

    a) 7 to 15 seconds.
    b) 5 to 10 seconds.
    c) 2 to 5 seconds.
    d) 3 to 7 seconds.

2. Long greeting messages can cause the customer to do what?

    a) Interested in the company.
    b) Excited about speaking with the operator.
    c) Lose interest.
    d) Relieved to have extra time to prepare themselves.

3. Which of the following should be included in a telephone introduction?

    a) The operator's name.
    b) The operator's title.
    c) The operator's department.
    d) All of the above.

4. A proper greeting is used to inform the caller of what?

    a) Where they are calling.
    b) What the company has to offer.
    c) What type of revenue the company makes.
    d) What the operator can do for them.

5. Why is it important to focus on the customer's needs

    a) To shorten call times.
    b) To maintain customer satisfaction.
    c) To increase employee bonuses.
    d) To increase productivity.

6. What is one way to ensure you are focused on the customer's needs?

    a) Listen without interrupting.
    b) Talk very quickly.
    c) Minimize the time allowed for the customer to speak.
    d) Repeat everything the customer says.

7. What is one tip for trying to remain patient?

    a) Tap your fingers loudly on the desk.
    b) Convince the caller to speak less.
    c) Place the caller on hold frequently.
    d) Taking frequent deep breaths.

8. Having patience allows the operator to do what?

    a) Increase productivity.
    b) Focus on the caller's needs.
    c) Shorten call times.
    d) Speak with more clients per hour.

9. What did Sandra say was one of the most important parts of the telephone call?

    a) Complete the call in a certain time frame.
    b) Transfer the caller to the correct department.
    c) Remain focused on the caller's needs.
    d) Convince the caller to buy their product/service.

10. What did Elliott admit he had a problem with?

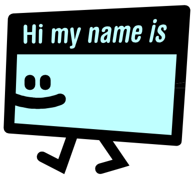
    a) Being patient.
    b) Speaking too fast.
    c) Not staying focused on a call.
    d) Being tardy too often.

Module Six: Outbound Calls

Outbound calls can be some of the hardest types of calls to make. They require the caller to be well prepared and be able to keep the 'target' engaged while trying to deliver a point. Feeling such as nervousness and a fear of rejection can make these types of calls seem daunting to anyone. But with some helpful techniques and a little practice, the caller will have no problems picking up the phone and dialing a number.

Be Prepared

When making outbound calls, it is important to have all of your information prepared and ready before you even dial the number. Remember, you are asking the caller for a moment of their time, so be respectful and be ready with your information as soon as they pick up. Practice saying any scripting or phrases ahead of time so that you aren't surprised by anything. Review the name of the person you're calling and what their title is. Know what to say if they have any possible questions or if they want to refuse service. By preparing everything you need beforehand, you'll be ready for anything that may come up.



Identify Yourself and Your Company

When making outbound calls, the person on the other end of the line will most likely not have any idea who you are or what you want. Before you begin speaking about your product or service, it is important to identify yourself, your company and the reason for your call. If you do not identify yourself from the start, the recipient will become uncomfortable speaking with you and will lose interest right away. The recipient wants to know that you are calling them for a specific reason and that they are not just a random dial made by the company. Make them feel special by letting them know who you are and where you are calling from, and get right to the point as to why you are calling them today.

Examples:

- "Hello. My name is Sally and I'm calling from Smith Industries. May I speak to Mr. Jones?"
- "Hello there. My name is John. I'm calling from Amy Corp. Is Ms. Petty available?"

Give Them the Reason for the Call

After you've prepared yourself and have identified yourself to the recipient, the next step is to tell the recipient the reason you are calling them. If our introductions runs too long, or we begin our scripting without stating its purpose, the recipient can become bored, confused, or even plain angry. Once they have become agitated, they will be unwilling to listen to anything you try to say and will disengage the call. To hold their attention, keep the information in a steady flow without a lot of pauses or 'filler words' (such as 'um' and 'uh'). Introduce yourself and your company, and then move into the reason for your call and why you would like to speak with them.

Examples:

- "Hello, my name is Pat. I'm calling from ABC Corp about your current cable service."
- "Hello. My name is Kate and I'm calling from Ally Hospital. Do you have a minute to complete a patient survey?"
- "Hello. My name is Jack. I'm calling from Ace Autos. I'd like to speak with you about your recent purchase."

Keep Caller Information Private

Before we can begin to make outbound calls, we should already have a mound of personal information about the customers we intend to call. Since we are the ones doing the majority of the talking, we control much of the information in the conversation. It is important that the caller know that their information will be kept private and will not be 'aired' throughout the office. When a call is made, keep the customer information with you to review while speaking with them. Speak in soft volumes so that employees around you cannot hear the customer's information. Assure the customer that their information will be kept private and will not be shared with anyone. Finally, when the call is over and you no longer need the information, shred any hard copies that were made and delete any digital files that are not needed at the time.

Case Study

Jacob was busy making his regular outbound calls for the day. But in the middle of the day Jacob's manager, Holly, came by his desk with a new assignment for him to complete. She explained that she wanted Jacob to call the clients on the list and ask them several questions from a new company survey. Since Jacob was new to the project, he asked Holly to go over all of the material with him and help him become better prepared before starting the calls. Holly stressed to Jacob that the client's information should remain private and only be used for this survey. Holly also instructed Jacob to identify himself to the caller and let them know he is calling to complete the survey on their behalf. After Jacob reviewed all of the information and scripting, he started from the top of the list and began calling clients.

Module Six: Review Questions

1. What is one way to become better prepared for outbound calls?

   a) Practice the call scripting.
   b) Call several test clients first.
   c) Create several sticky notes with cheat sheets.
   d) Read over the material only once.

2. Being prepared when we call clients shows what?

   a) Boredom.
   b) A need for perfection.
   c) Eagerness.
   d) Respect for the client.

3. When is the proper time for the operator to identify themselves?

   a) The end of the call.
   b) At the beginning of the call.
   c) After the customer introduces themselves.
   d) Never.

4. It is important for the caller to identify themselves to prevent the client from doing what?

   a) Requesting more information.
   b) Asking stupid questions.
   c) Losing interest in the call.
   d) Buying the product.

5. If the caller does not identify the reason for their call, the client may do what?

   a) Become bored.
   b) Become curious.
   c) Become tired.
   d) Become excited.

6. The caller should deliver the reason for the call without using what?

   a) Inflection.
   b) Cheerful tones.
   c) Filler words.
   d) Fancy terms.

7. What is one way a customer's digital information can be kept private?

    a) Leave them on a shared computer desktop.
    b) Place the files in a public folder.
    c) Print all the files out to keep together.
    d) Delete their files when not needed.

8. What is one way a customer's printed information can be kept private?

    a) File the information in your desk.
    b) Shred the files after each encounter.
    c) Hand the files to someone else to sort.
    d) Create folders for every client you speak with.

9. What was the purpose of the new outbound calls Jacob was making?

    a) To complete client surveys.
    b) To sell a new product.
    c) To advertise the company's new service.
    d) To sell tickets to a local event.

10. What part of the assignment did Holly stress was very important?

    a) Selling lots of product.
    b) Ensuring the customer does not say 'No'.
    c) Keeping the client information private.
    d) Calling as many people as possible.

Module Seven: Handling Rude or Angry Callers

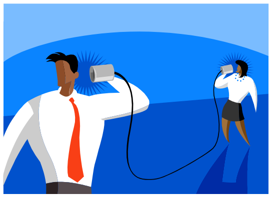
One of the hardest, and somewhat scariest, situations a telephone operator can handle is a rude or angry caller. Every company has them and any person that answers a company phone will encounter them at some point. Many times they can come out of nowhere and it can be difficult to keep the caller focused on what they need/want. But depending on how the operator responds can be the difference between saving and losing that customer.

Stay Calm

Staying calm with an angry or rude called can be one of the hardest tasks a phone operator must do. Our natural reflect to anger or rudeness is to become defensive and lash back. However, if we show our emotions, especially negative ones, it only makes the caller angrier. Remember that the customer just wants to be heard and wants to have their problem resolved. So even if the customer starts speaking rudely or becomes angry with you, using your favorite tip or trick to help you stay calm and you'll be able to help the caller once they have begun to cool down.

Tips for staying calm:

- Never take what the caller says personally
- Take deep, relaxing breaths
- Empathize with the customer
- Speak in calm, assuring tones



Listen to Their Needs

When we encounter rude or angry callers, our first instinct is to stop listening to what they have to say due to their poor attitude. However, this is not the key. The caller may be upset, but they still want to be assured that someone will hear their complaint and help them get what they need. As the telephone operator, it is important to listen to what the caller has to say and try to identify what they are seeking. Many times the upset caller will tell us exactly what they need, but will mask it with harsh words and raw emotions. It is your job to put these feelings aside and let the customer know you can still help them get what they need.

Tips:

- Empathize with the caller's needs
- Remember that their needs/concerns are important too
- Identify what the caller is asking for

Never Interrupt

When a person is interrupted while they are speaking, it can cause them to become irritated or frustrated. But when a caller is angry or rude, interrupting them will only make the caller angrier, causing the situation to worsen. Although it may sound counter-productive, the best method to use with callers such as these is to let them speak until they begin to slow down and eventually finished with their rant. During this process, listen empathetically and continue to acknowledge their concerns. Once the caller has finished speaking, or to least pauses for a continued response, then you can begin to offer ways you can help the caller and what you can do for them. In many cases, the customer just wants to know their complaints or problems are heard and acknowledged by someone in the company. Once they feel like someone has heard their concerns, they will be more open to accepting some sort of solution available.

Identify What You Can Do for Them

When a customer is angry or upset, the last thing they want to hear from the company is what *can't* be done for them. This can cause them to become angrier and more upset. Once you have identified why the caller is upset, it is time to offer a real solution. By identifying what you can do for the caller, rather than what you can't do, you are assuring them that you are there to help and can help them resolve the problem they are having. Give them realistic options that can actually be done, such as speaking with a manager, filing a complaint with customer service or receiving help with the product/item/service. If you're able to solve the problem, do what you can to do so. If the caller needs to speak with someone else, take the time to ensure they reach the appropriate person and can go to the next step of reaching a solution.

Case Study

Georgia received a call from a client that was not happy about the product he received in the mail. Mr. Jones continued to complain about the quality of the product and was angry that he paid so much for it, only to be broken in the mail. Georgia listened to Mr. Jones's complaints and patiently waited for him to finish speaking. Once Mr. Jones was silent, Georgia apologized for the poor product he had received and acknowledged how he could be upset about that. Georgia told Mr. Jones that she would be happy to offer him a replacement product or a full refund. Mr. Jones was happy about the option of receiving a refund and asked to send his money back. Georgia acknowledged his choice and told Mr. Jones she would happily connect him to the refund department. With Mr. Jones still on the line, Georgia called Rene in the refund department and told her the situation. Once Rene had Mr. Jones's information, Georgia conferenced Mr. Jones to Rene and told him she would be happy to help him receive his refund.

Module Seven: Review Questions

1. What is one tip for staying calm with angry or rude callers?

    a) Speak very quickly
    b) Speak in soft tones
    c) Speak in loud tones
    d) Do not speak at all

2. It is important to not do what when listening to angry callers?

    a) Remain calm at all times
    b) Speak softly
    c) Listen to the caller
    d) Take anything personally

3. One way to better listen to the caller's needs is to do what?

    a) Empathize with them
    b) Increase the telephone volume
    c) Transfer the call to customer service
    d) Repeat everything the caller says

4. Angry or rude customers will often mask what they need behind what?

    a) Poor employee performance
    b) A hidden agenda
    c) Heightened emotions
    d) Personal problems

5. What is one method for handling angry/rude callers?

    a) Hanging up when they raise their voice
    b) Not acknowledging what they are saying
    c) Transferring them to a manager
    d) Listen without interrupting

6. By listening to angry callers until they are finished, the caller will feel what?

    a) Out of breath
    b) They are acknowledged by someone
    c) They are being patronized
    d) More agitated

7. Identifying what you can do for a customer allows the operator to do what?

    a) Offer a solution
    b) Get off the telephone faster
    c) Increase productivity
    d) Over-talk the angry caller

8. It is important that any solutions offered by the operator are what?

    a) Outrageous
    b) Somewhat possible
    c) Realistic
    d) Exactly what the caller wants

9. Why was Mr. Jones very upset?

    a) He was charged twice on his credit card
    b) The product he received was not what he had ordered
    c) The company sent his item to the wrong address
    d) He had received a broken product in the mail

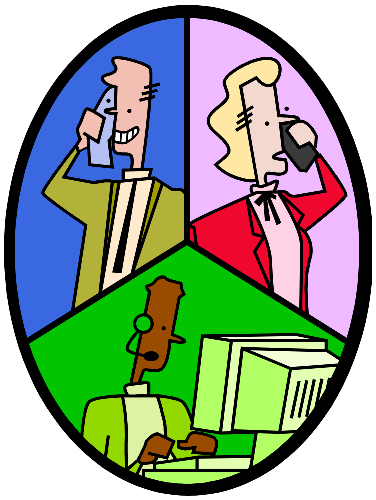
10. What solution did Georgia assist Mr. Jones with?

    a) A product replacement
    b) A full refund
    c) Offering the customer store credit
    d) Nothing

We cannot accomplish all that we need to do without working together.

Bill Richardson

Module Eight: Handling Interoffice Calls



When handling calls with the outside public, there is a set of guidelines and policies that the telephone operator follows. But when the calls are within the company, or within the same office, these policies and guidelines can shift a bit and become a whole new set of guidelines all their own.

Transferring Calls

Transferring a call to another telephone number may seem like an easy task, but it still requires a bit of skill in any office environment. Many times, when a caller is transferred, they feel as though they are being ignored and simply 'dumped' onto someone else. So if you have a caller on the line that needs to be transferred to somewhere in the department or the company, first notify the caller as to why you are transferring them. Once they understand why, let them know where you are transferring them to and the name of the person to speak with, if known. This lets the caller know that you are trying to help them by getting them to the correct place.

When possible, 'warm transfer' the caller to the extension. Warm transferring allows the telephone operator to call the department they are trying to reach, speak with an agent and give them information about the call. Once the agent is ready, the operator transfers the call directly to them.

Tips for transferring calls:

- Tell the caller why they are being transferred
- Let them know who/where you are transferring them to
- When possible, introduce the call before transferring

Placing Callers on Hold

Just the same as transferring a call, placing a caller on hold can make them feel ignored and that the telephone operator does not want to help them. In order to assure the caller that we are there to help them, we must take precautions when placing them on hold. When handling calls from within or outside the office, always ask the caller if they are able to hold and wait for their answer before doing so. Let them know why you may need to put them on hold, such as if you need to search for more information or find the person they are trying to reach. When you return, be sure to thank them for their patience while holding and let them know what you have found for them. If, for some reason, the caller cannot or will not hold, offer to take their contact information and give them a call back when you have the information/party they are searching for.

Tips for placing callers on hold:

- *Always* ask permission to place the caller on hold
- Check back periodically if the caller is on hold for a long time
- Remember to thank the caller for waiting when you return
- If the caller does not want to hold, offer to take a message

Taking Messages

Although many departments do not require employees to take message for each other, the occasion can arise where an employee receives a call from someone looking for another person and wants to leave their callback information. When taking messages for someone in the office, it is similar to the process of taking a message from an outside caller. First, make a note of what day and time the call came to you. Then obtain the caller's information, such as name and their title, if they have one, and ask them for the best callback they want to leave with you. Finally, note what the caller wants from the other party, such as requesting a callback, simply leaving information for the other party, or if the message is urgent and they need to speak with them right away. Ensure you have all the information **you need before disconnecting with the caller.**

Tips for taking messages:

- Note the date and time of the message
- Get the caller's name and title (if they have one)
- Verify a good callback number
- Note what the message is for

End the Conversation

Sometimes ending a call with someone can be an awkward feeling and can leave both parties unsure if the call is over. The key is to remain professional while letting the caller know that the conversation is over, which means you are about to hang up. Begin by reviewing the information from the call, such as if you took a message for them or will need to connect them to another party. Once the caller has understood that you have everything you will need, offer a salutation or parting phrase, such "Thank you for calling today" or "It was a pleasure speaking with you". This alerts the caller that you are wrapping up and they may offer a farewell first. Always end with a professional "Good bye" or "Have a good day/evening/night". Avoid using slang terms such as "bye-bye" or "Alright" when dismissing callers since these can cheapen your sentiments and sound unprofessional.

Samples phrases for ending a conversation:

- "Is there anything else I can do for you?"
- "Thank you for calling today."
- "Have a good day/evening."

- “I’m glad I was able to help you today.”

Case Study

Darren was working the front desk of the office and received numerous inbound calls every hour. His next all was from a coworker in the department downstairs. Janet asked Darren if she could speak to Paul, one of the workers in his department. Darren asked Janet if he could place her on hold while he checked to see if Paul was in. When Darren came back on the line, he thanked Janet for holding and told her that Paul was not at his desk right now.

“Oh, alright. Would you mind taking a message for me?” Janet asked.

“Sure, I can do that.” Darren replied.

Darren noted the time Janet was calling and what she was calling for. He verified her callback number and what time was best to reach her back.

“I have everything I need, Janet. I’ll get this information to Paul today.” Darren said.

Janet thanked him for his time and hung up the phone.

Module Eight: Review Questions

1. What must be done before a call is transferred?

   a) Tell the caller they are being transferred.
   b) Place the caller on hold for several seconds.
   c) Disconnect the operator from the line.
   d) Tell the caller why they are being transferred.

2. A transfer that introduces the caller beforehand is known as what?

   a) A warm transfer.
   b) An introductory transfer.
   c) A greeting transfer.
   d) A mutual transfer.

3. What must be done before a caller is placed on hold?

   a) Transfer to another operator.
   b) Tell the caller you are placing them on hold
   c) Ask permission from the caller.
   d) Have another operator do it.

4. If the caller is not able to hold, what can the operator do?

   a) Convince them to hold.
   b) Take a message.
   c) Offer to transfer them somewhere else.
   d) Nothing.

5. What information should be included in a message taken by the operator?

   a) Time of the call.
   b) The name of the caller.
   c) What the caller is requesting.
   d) All of the above.

6. Before disconnecting with the caller, the operator should verify what about the message?

   a) If they have all the information needed.
   b) If it is worth writing down.
   c) If the caller will instead just call back later.
   d) If they have to keep the message for a while.

7. What is the purpose of using a parting phrase?

   a) To abruptly end the call.
   b) To ask the caller what else they want.
   c) To signal the end of the conversation.
   d) To shorten call times.

8. Which of the following is an example of ending a conversation?

   a) “How may I help you?”
   b) “Thank you for calling today.”
   c) “Where can I send this information to?”
   d) “When can you come in for a meeting?”

9. What did Darren do before placing Janet on hold?

   a) He told her he would transfer her instead.
   b) He asked if she would mind calling back instead.
   c) He told her he would be right back.
   d) He asked permission to do so.

10. How did Darren assist Janet in the end?

   a) He took a message for her.
   b) He told her to call back later.
   c) He transferred her to Paul’s desk.
   d) He did nothing.

Module Nine: Handling Voicemail Messages

Voicemails are a great tool to have in this age of technology, especially since the employee may not always be at their desk or may be busy taking calls from another customer. It is important to understand how to retrieve and deliver these messages efficiently so that critical information isn't lost and the chance to build a professional relationship isn't missed.

Ensure the Voicemail Has a Proper Greeting

When establishing your own voicemail, it is important to have a proper greeting message for your callers to hear. For your personal voicemail, record your own message in your own voice. Include your name, title and department when possible. Many callers already feel as though the call is impersonal once they reach the voicemail and they want to be reassured that they have reached the right person before they leave their information. If you are going to be away for an extended period (i.e. vacation, business travel), it is helpful to include this information on your voicemail greeting so that callers can know to expect a callback once you return.

Voicemail tips:

- Record your own greeting
- Avoid automated greetings
- Include your name and department
- Give it a personal touch

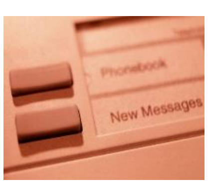
Answer Important Messages Right Away

A voicemail can contain several messages at once from numerous sources. Although they can seem overwhelming at times, it is important to determine which messages are urgent and need to be answered right away. Every department is different and will have a different definition of urgent calls, but urgent generally refers to calls that cannot wait too long to be answered or they can cause damage in some form or fashion. This include messages from angry or upset callers, a call from a customer needing answers right away or messages that have gone unanswered for an extended period of time. Urgent calls should typically be answered within 24 hours of receiving them. If you do not have the answers/resources they need, give them a call to let them know that you did receive their message and that you are currently seeking the information they need and will call them back as soon as you have it. If possible, give an estimated time frame for your return call.

Ensure Messages are Delivered to the Right Person

This can seem like a simple task, but there are many times a message is delivered to the wrong person or delivered to someone that is not able to relay the message, so it is never answered. If you receive a voicemail on your personal line for someone else, take note of the caller's name, the employee's name and if the caller mentions what department they are in. If the employee is in your department, then pass the message along by hand and let them know you received it by mistake on your line. If they are in a different department or area, speak to human resources or a company courier as to how you can have the message safely delivered to them. If you are checking a department voicemail that covers several different employees, the process should be similar. Ensure that you record the caller's name and information, if there is a certain employee they are trying to reach and the purpose for their call. If you cannot return the call, it is important to deliver the message to someone who can so that the message does not go unanswered.

When Leaving a Message for Others



Leaving a voicemail message for someone can sometimes feel like an art form. Many voicemail machines only allow a certain amount of time to leave a message, so it's important to only leave the essential information with enough details for the recipient to know why you called. When on a voicemail, leave your name and title. Also leave the date and time that you called and the reason you're calling. Finally, be sure to leave a good contact number where you can be reached and the best time of day to contact you. Try and limit your message to one topic at a time and do not overload the voicemail with various topics.

Tips:

- Leave your name, title and department
- Leave the date and time you called
- Include the best number and time of day to reach you

Case Study

Casey was checking the department voicemail system for any recent messages. Several message were not very urgent and she noted that she would call them back later in the afternoon. However, the next message she received was for one of her coworkers, Andrew, and the caller stated that it was urgent to speak with him. Casey wrote the information down and made a note of when they called. First, Casey tried calling Andrew’s extension, but he wasn’t available. Casey left him a brief message stating her name, why she was trying to reach him, and left her desk extension number to call back to. After that, Casey decided to ask one of the team leaders if they knew where Andrew was working today. They told her he was working on a project in sales and told her where he would be. Once Casey found Andrew, she gave him the message and told him it was urgent. Andrew thanked her for the message and told her he had been waiting on this caller all day, so her assistance was very helpful.

Module Nine: Review Questions

1. Which of the following should be included in a proper voicemail greeting?

   a) The department name.
   b) The assistant's name.
   c) The current temperature.
   d) The employee's vacation plans.

2. It is recommended to not use what for a voicemail greeting?

   a) A personal recording.
   b) An automated greeting.
   c) The recipient's title.
   d) The recipient's current department.

3. Urgent calls should be answered in what time frame?

   a) Within the week.
   b) Within 3 to 4 days.
   c) Within 48 hours.
   d) Within 24 hours.

4. Which of the following would be considered an urgent message?

   a) A message from a new client.
   b) A message requesting sales information.
   c) A message from an irate caller.
   d) A message regarding a job application.

5. In order to find the correct message recipient, the operator must identify what?

   a) Who the caller asked for in the message.
   b) Who the operator thinks it should go to.
   c) Who the next person on shift is.
   d) The manager of the department – always.

6. What is one way to ensure a message has been properly answered?

   a) Hoping it went to the right person.
   b) Calling the caller back to see if anyone answered them
   c) Asking a coworker if they know.
   d) Ensuring the message reaches the correct person to handle it.

7. What is one tip when leaving messages for someone else?

    a) Speak softly.
    b) Speak clearly.
    c) Speak very slowly.
    d) Speak very quickly.

8. Which of the following should be included in a voicemail message?

    a) Your obvious frustration.
    b) Any personal requests.
    c) Your callback number.
    d) Your plans for the day.

9. How did Casey first attempt to reach Andrew?

    a) By calling his desk extension.
    b) Walking around the office.
    c) Asking a coworker if they had seen him.
    d) Sending him an e-mail.

10. Where was Andrew working besides his normal department position?

    a) Delivering office mail.
    b) Answering survey calls in the all center.
    c) Helping a coworker in accounting.
    d) Working on a project in the sales department.

> *Fine etiquette needs the support of fine etiquette in others.*
>
> ***Ralph Waldo Emerson***

Module Ten: Methods of Training Employees

While having good telephone etiquette is beneficial, it will not do any good if it is not taught to the rest of the team. It is important to the company's success that every employee is properly trained and able to demonstrate telephone etiquette before being let loose on the telephone. Every employee learns differently, so it's helpful to have several methods available to allow employees to adopt these skills.

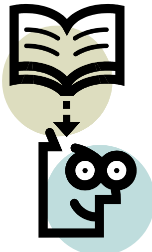
Group Training

Group training, sometimes referred to as classroom training, is a method training employees that involves one or two trainers that are responsible for training a group of new hires, typically in a separate room or training area. When training for telephone etiquette, group trainers will set up an area where multiple employees can listen to recorded calls, review anonymous employee evaluations, and review different techniques and procedures, such as a classroom setting. In this process, the company is able to train several employees at once and allows for these employees to gain some experience before leaving their training stages.

Common techniques used in group training:

- Role playing
- Simulations
- Audio visual aides

- Current employee examples



One-on-One Training

One-on-one training typically involves the employee being trained an only one, sometimes two, trainers. This method is more popular when training a current employee or an employee that is just coming into the department, rather than a new hire. These types of training sessions are usually a little more informal to allow the employee and the trainer to become comfortable with each other. In one-on-one sessions, the training can be more customized to the employee and can focus on areas that the employee may have trouble in while offering individualized goals and benchmarks for the employee to work towards.

Common activities used in one-on-one training:

- Direct questions/answer sessions
- Identifying strengths and weaknesses
- Offer individualized support
- Creating performance goals

Peer Training

Although peer training is a method that is not used as often as other methods, it is still a helpful tool when training a small group of employees. In most cases, peer training is used for training a very small group of employees (2-4 preferably) and can include new hires as well as current employees. Peer training involves a member of the staff, usually a team or floor leader, which will train fellow employees in a certain area. For new hires, they can train with a peer trainer after going through some sort of initial company training. But current employees can also train with a peer trainer if they are being introduced to new areas of phone etiquette or if they are new to the department (such as an internal transfer). Peer training can be advantageous to many employees since they can learn first-hand from someone who is doing similar work and can simplify any areas of confusion the employee may have.

Job Shadowing

Job shadowing is defined as a type of employee training designed for a new employee, or an employee wanting to become familiar with the job area, observes and follows an experienced employee in the department. Job shadowing differs from peer training in that job shadowing allows for more observations and questions/answers rather than engage in any direct form of training. The employee is able to experience the trainer's approach to telephone calls and the steps and actions necessary to perform the job that the group or company trainer might never think to mention. This method can include observation methods such as listening to active calls (the Y-method), observing employee actions and even learning to work some of the equipment involved (telephones, computers, etc.).

Case Study

Tina and Tammy were discussing possible methods of training for the group of new hires that were going to start working the following week.

"I like to use group training since we have so many people to train at once," Tina said.

"That's true. But I prefer to use peer training since the trainer is so experienced in the field," Tammy replied.

Tina and Tammy thought about the possible methods available and wondered which methods could accommodate the group they had. They decided not to use one-on-one training since that would take too long and would train enough people in time. The ladies finally decided that the new hires should complete the standard group training and then could proceed to shifts of job shadowing. By then, the employees should have enough training and exposure before being able to go straight to work.

Module Ten: Review Questions

1. Group training is often referred to as what?

    a) Crowd training.
    b) Collaborative training.
    c) Classroom training.
    d) University training.

2. What is one advantage of using group training?

    a) The ability to utilize a classroom setting.
    b) The ability to train lots of people at once.
    c) The ability to allow peers to train each other.
    d) The ability to customize the training agenda.

3. One-on-one training is usually considered what?

    a) Useless.
    b) Boring.
    c) Impersonal.
    d) Informal.

4. What is one advantage of using one-on-on training?

    a) The training can be individualized.
    b) The training does not take as long.
    c) Participants do not have to stay for the entire session.
    d) Employees can decide when to hold meetings.

5. One disadvantage of using peer training is what?

    a) It can only be used on certain employees.
    b) Personal feelings can distort training.
    c) The trainers have to be paid more.
    d) The employees have to be trained more than once.

6. Peer training can be helpful to which group of employees?

    a) New hire employees.
    b) Transfer employees.
    c) Temporary employees.
    d) All of the above.

7. What is one method of job shadowing?

   a) Secret shoppers.
   b) Peer monitoring.
   c) Direct observation.
   d) Group learning.

8. What is one disadvantage of job shadowing?

   a) There is no formal training involved.
   b) The process can take too long.
   c) The lack of veteran employees to follow.
   d) The cost of the program.

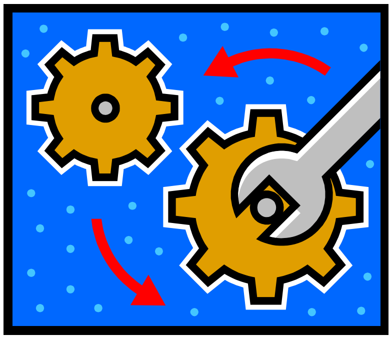
9. What method did Tina prefer to use to train the new employees?

   a) Job shadowing.
   b) Group training.
   c) One-on-one training.
   d) Peer training.

10. What method did Tammy prefer to use to train the new employees?

    a) Group training.
    b) One-on-one training.
    c) Job shadowing.
    d) Peer training.

Module Eleven: Correcting Poor Telephone Etiquette



Poor employee skills can decrease productivity and damage company costs. The key is to address and handle the problem before it can affect the whole team. Poor telephone etiquette is no exception. Many employees may not realize that their etiquette may be inadequate, so it is important that there are several tools available to help them get back on track.

Screening Calls

Many companies that offer a telephone service have taken advantage of some sort of call monitoring service. The service records each employee call and allows them to be played back at a later time for review. This process, known as screening calls, can be a great tool for reviewing employee phone calls and checking for correct telephone etiquette. A manger or supervisor can review as many calls as needed to review an employee's performance and determine if any poor telephone etiquette was a small occurrence or a consistent problem. After the manager/supervisor has reviewed the calls, it is best to bring the employee into a secluded meeting to review the calls together. From here, the employee can hear how their calls sound to others and identify areas they need to improve on. This process is also a helpful tool for the manager/supervisor and the employee to create and set future performance goals.

Employee Evaluations

Individual employee evaluations are another great tool for assessing and correcting any instance of poor telephone etiquette. An employee evaluation is typically created with several points or guidelines in place that an employee is expected to follow and meet certain criteria. Employee evaluations can be done through a number of methods, but the main goal is to use the criteria form and assess an employee's telephone etiquette skills and mark areas that are excelling and which areas will need improvement. The evaluator should meet with the employee to discuss any results of an evaluation so that they can know which areas are not meeting expectations and can set future performance goals.

Methods of employee evaluations:

- Individual call screenings
- Call re-enactment/role playing
- Direct monitoring
- Secret shoppers

Peer Monitoring

Peer monitoring is a tool of assessment that is growing in popularity. Peer monitoring allows employees to work together to help improve areas of skill and technique. This process allows an employee's peer, typically a team leader or floor manager, to work with an employee to evaluate and assess their telephone etiquette skills. Some common methods include direct monitoring by sitting with the employee, screening calls together and even completing written evaluations. Often times, because the monitoring is completed by a peer (instead of a manager or supervisor), the employee may feel less threatened and more at ease to accept terms of advice or criticism. However, the peer monitor must be able to deliver any positive or negative feedback necessary and not let the employee relationship hinder that process.

Customer Surveys

Another method of evaluating employee telephone etiquette is to employee customer/client surveys. A very common method of using customer surveys is to enable ‘secret shoppers’ to call and complete a survey on their experience. Secret shoppers are a well-known service that allows anonymous evaluators to call into a business and act and respond like a typical customer. The telephone operator does not know the caller is grading them or that their skills are being evaluated at that moment. At the end of the call, the secret shopper completes the evaluation and returns it to management. From here, the manager can meet with the employee and review how the call played out.

Another common method of customer surveys is by using customer follow up calls. While these calls typically focus on the company/service as a whole, they can be tailored to focus on the customer’s experience with the telephone operator. They can be asked if the operator was friendly or helpful, or if the operator needed improvement in any areas. Once again, these evaluations can be completed and returned to management so they can be reviewed with the employee.

Case Study

Jennifer was reviewing some of Matthew’s recent employee evaluations. After several secret shopper customer surveys, she saw that his scores were not as high as they should be. She had already placed him through a monitoring session with the team leader, Ashley, but it did not improve his telephone etiquette scores. Jennifer called Matthew into the office and spoke with him about this problem. Matthew explained to her that he didn’t understand where he was making mistakes and that the peer monitoring session didn’t help him. So Jennifer decided to take a few minutes and review some of Matthew’s calls one-on-one. As Jennifer played some of the recorded calls, she took breaks to point out areas that were strong and areas that needed to be improved. After playing the second recorded call, Matthew said he identified several areas he could work on and was able to identify more of the mistakes he was making. Jennifer hoped after this evaluation session that Matthew would be able to improve his scores and better understand how to have better telephone etiquette.

Module Eleven: Review Questions

1. Screening calls are a useful tool to create what?

   a) Employee performance goals.
   b) Employee scripting.
   c) Employee peer trainers.
   d) Employee work logs.

2. Screening calls can help identify what?

   a) Patterns of employee productivity.
   b) Problems with the telephone lines.
   c) Patterns of poor telephone etiquette.
   d) Problems with the computer networks.

3. What is one advantage of using employee evaluations?

   a) They are easy to do.
   b) Better provides employee feedback.
   c) It gives the managers less work to do.
   d) The evaluations can be redone at any time.

4. What is one method of an employee evaluation?

   a) Peer monitoring.
   b) Group evaluations.
   c) Anonymous voting.
   d) Direct monitoring.

5. What is one benefit of using peer monitoring?

   a) The employee typically feels more at ease.
   b) The employee feels like they can ask more questions.
   c) The peer monitor has more freedom with the employee.
   d) It gives the manager less work to do.

6. What is one disadvantage of using peer monitoring?

   a) Peer monitors have to be paid more.
   b) Employees may not always agree with the peer monitor.
   c) Employees will not listen to a peer monitor.
   d) Peer monitors can become sensitive to the employee.

7. Anonymous call evaluators are also known as what?

   a) Mystery dates.
   b) Secret shoppers.
   c) Anonymous guests.
   d) Casual callers.

8. What is one method of a customer survey?

   a) Peer monitoring.
   b) Classroom voting.
   c) A follow up visit survey.
   d) An evaluation completed by a peer.

9. How did Jennifer know Matthew had poor telephone etiquette?

   a) Several customer surveys had negative feedback.
   b) Another employee came and told her.
   c) She noticed it when she walked through the office.
   d) Matthew approached her seeking help.

10. What did Jennifer do that helped Matthew identify his poor etiquette?

   a) Assigned him to a peer monitor.
   b) Listened to his recorded calls.
   c) Played his recording in front of the entire office.
   d) Completed a one-on-one evaluation with him.

I think the best training a manager can be engaged in is management by example.

Carlos Ghosn

Module Twelve: Wrapping Up

Although this workshop is coming to a close, we hope that your journey to better telephone etiquette is just beginning. Please take a moment to review and update your action plan. This will be a key tool to guide your progress in the days, weeks, months, and years to come. We wish you the best of luck on the rest of your travels!

Words from the Wise

- **Emily Post**: Manners are a sensitive awareness of the feelings of others. If you have that awareness, you have good manner, no matter what fork you use.
- **Clarence Thomas**: Good manners will open doors that the best education cannot.
- **Jim Collins**: In a world of constant change, the fundamentals are more important than ever.
- **Amy Vanderbilt**: Good manners have much to do with the emotions. To make them ring true, one must feel them, not merely exhibit them.

Review of Parking Lot

Review the items on the parking lot. Some items may need one-on-one participant follow up. You may be able to clear other items up now. Follow-up workshops may even be appropriate.