

# Telephone Skills

## Why learn telephone skills?

Count the telephones in your home. Then, ask your friends how many phones they have. Do you find the answers surprising?

### Americans love the telephone

AT&T says each American household has at least three installed telephones. In addition, over 15% of Americans own a cellular or mobile phone. Today, people call from cars, boats, airplanes, and as they walk down the street. Chances are, if you can't reach someone directly, you can leave a message on a telephone answering machine or voice mail. Sixty-five percent of all Americans have answering machines or voice mail either at home or work.

You can buy a phone that looks like a mouse, a shoe, a baseball, a book, or a race car. The telephone is an old, familiar friend. And we take its use for granted because we have known it so long.

### Everyone depends on telephones

In today's technologically advanced workplaces, getting information quickly is vital to any company's success. High-level executives spend more time on the telephone than in meetings, making 600 million business calls daily. We can speak to people nearly anywhere in the world at almost any time.

Businesses and governments spend millions of dollars annually to design electronic communications systems that allow them to provide services. One of former president Bill Clinton's first acts when he moved into the White House was to replace its antiquated telephone system with a new, more efficient telephone network.



### Why telephone skills are important

Company owners and managers study how employees use the telephone and then spend hundreds of thousands of dollars a year

*(continued on page 2)*

### What's inside!

In these pages, you will learn to:

- use good telephone skills .....p. 3
- talk with a smile.....p. 7
- stay out of "quicksand" .....p. 8
- take a message.....p. 10

## Telephone skills *(continued from page 1)*

training their staffs to use the phone correctly. Why spend so much money on training?

- **A telephone conversation often creates the first impression.** Corporate communication managers know the first impression of a company often comes from the person who answers the telephone. And first impressions may be lasting impressions.

- **Telephone conversations bring in business.**

Companies want their employees to treat callers and customers with respect and consideration. They know that telephone courtesy produces new and repeat business.



- **Most employees use the telephone.** The corporate mailroom staff uses the telephone for special mail requests from other employees. A computer repair person answers questions and orders parts by telephone. Accountants verify invoices with suppliers by telephone.

### New employees need better telephone skills

Company owners and business managers say that new employees often have poor telephone skills. As an entry-level employee, you will enjoy success sooner if you exhibit outstanding telephone professionalism.

Compare the examples below to your experiences when calling businesses. What is the common problem in all these situations? Would you call back?

- Someone chewed gum while talking.
- You were placed on “hold” so long you finally hung up.
- You called a business and got a short, snappy answer.
- The greeting was so fast you couldn’t understand what the person said.

Telephone rudeness and bad manners anger customers, clients, and personal callers. When you answer business calls, be polite and helpful every time.

As you think about your telephone skills, don’t let inexperience limit your chances of doing a good job. Test your telephone knowledge in Activity 1.

### Test your telephone knowledge

1

**Activity 1.** How much do you know about the telephone at work? Circle T for “true” or F for “false” after each question.

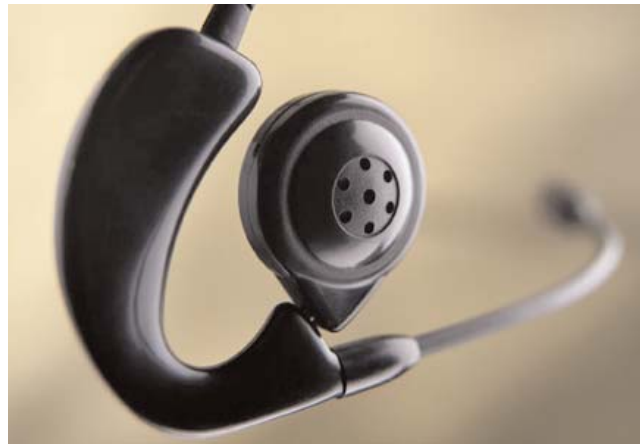
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|--|---|---|
| 1. American executives and business managers let their assistants and other trusted staff make most phone calls. | T | F |
| 2. Telephone conversations are not as valuable as person-to-person conversations.                                | T | F |
| 3. People who keep missing each other and leaving phone messages back and forth are playing “telephone tag.”     | T | F |
| 4. People don’t mind being put on hold when lively music is played over the phone.                               | T | F |

Answers: 1. F 2. F 3. T 4. F

# You can learn good telephone skills

**N**o one is born with good telephone skills. You need to learn how to be friendly, helpful, and efficient in work-related calls, so you will make a good first impression for your employer.

- **Answer the phone on the first ring.** No one likes to wait. Some callers may think your business is closed if the phone isn't answered right away.
- **Speak clearly so people can understand you.** Callers may need to write the information you're providing.
- **Use the hold button only when it's absolutely necessary.** Check back with callers at least once a minute to make sure they don't mind waiting longer.
- **Act interested and friendly.** Use the caller's name and show interest in the conversation. Make "please," "thank you," and "you're welcome" the three most important phrases in your business vocabulary!
- **Treat your callers the way you like to be treated.** Use this guideline if you're unsure of what to say.



- **Remember, every call is an important one.** The next caller may be a wrong number or a new customer. Someone who dialed your number by mistake might end up doing business with your company.
  - **Show appreciation.** End the call positively. Say, "Thank you for calling. Please call again."
  - **Be the last to hang up.** Give your caller time to ask any last-minute questions.
- Start thinking in Activity 2 about good telephone impressions.

## You get one chance to make a first impression

2

**Activity 2.** A few first impressions of telephone customers are listed below. Some are good first impressions, and others leave a bad feeling about the company. Can you add to the list?

### Good first impression

Friendly, helpful company  
Happy to answer questions  
Has time for me  
Eager to have my business

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### Bad first impression

Unpleasant, tactless  
Patronizes me  
Rushes the customer  
Doesn't care about me

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# Phoning on the job

**W**hen people go to work, they wear uniforms, suits, dresses, or other appropriate clothes. In the same way people dress up for work, they should “dress up” the way they speak on the telephone.

## The phone at work is not the phone at home

Business telephone conversations are very different from personal conversations. When you talk to your friends on the phone, you are just being you. When you talk to customers or clients, you are the spokesperson for your entire company. What you say and how you say it can make your company look good or bad.

When you use the telephone at work, change your tone from casual to professional. Listen carefully and give information in a clear, respectful manner.

### Use professional language

Professional language is more formal than casual language. If one of your friends calls you, the conversation might sound like this:

You: Hello?  
Friend: Is Andy there?  
You: This is Andy.  
Friend: Hi, it's me, Neesha.  
You: Oh, hi. What's up?

At work, with you and your caller using professional language, here's how your call might sound:

You: Hello, Slawesky and Daughters.  
Andrew speaking.  
Caller: Hello. This is Neesha Johnson.  
I'd like to talk to someone in the  
accounts receivable department.  
You: I'm in accounts receivable, Ms.  
Johnson. How may I help you?

As you can see, professional language is more polite and formal than casual language. You don't say “What's up?” at work. Rather, you ask “How may I help you?”



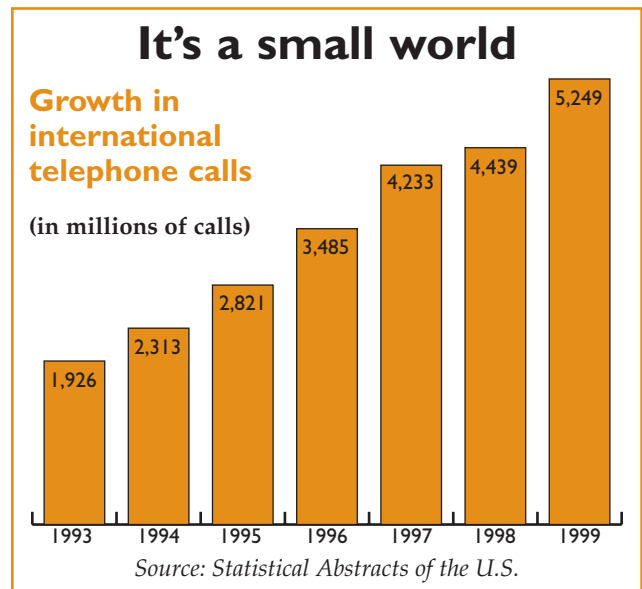
## Use standard business etiquette on the phone

Making outgoing calls and receiving incoming calls at work is not hard once you know how.

### Outgoing calls

- Gather all the facts before you make the call.
- Introduce yourself and state your reason for calling.

*(continued on page 5)*



## Phoning on the job *(continued from page 4)*

- Keep a list of the major points you wish to cover; then check them off after they are discussed.
- Set up a callback time if the other person is busy.
- Be friendly and polite, but don't get drawn into long conversations that don't relate directly to your work.

### Incoming calls

- Have pencil and paper handy.
- Check the answering machine regularly.
- Return calls promptly.

- Keep frequently requested numbers nearby.
- Answer the phone with the name of your company.
- Ask how you can help the caller.

### Special Tip

No matter how busy you may be, never be impatient with a caller for taking you away from other work. To evaluate your telephone manner on the job, try the experiments in Activity 3.



### Activity 3.

## How do you sound?

1. **Time of day.** Tape record your voice three times a day for one week as you use the telephone. Identify the time of day when you sound the most energetic. This is when you should schedule your difficult calls. Write a paper telling what you learned about yourself.

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2. **Posture and facial expression.** Place a mirror near the telephone. Try different postures and listen to yourself speak. Try facial expressions such as smiling, frowning, or staring into space. Then fill in the blanks:

"When I sit up, my voice sounds \_\_\_\_\_."

"When I smile, my voice sounds \_\_\_\_\_."

"When I slouch, my voice sounds \_\_\_\_\_."

"When I frown, my voice sounds \_\_\_\_\_."

"When I stare into space, my voice sounds \_\_\_\_\_."

## Your feelings show

**Y**our voice reflects your mood, and a bad mood travels through the telephone. Business callers expect you to be cheerful and pleasant with them all the time, whatever your mood. Imagine these situations:

- A co-worker says something that angers you. When the phone rings, you sound and act angry toward the caller, even though she's not the one who upset you.
- Your boss scolds you for being late, and you're worried you might lose your job.

You sound fearful and timid to the next caller.

- You were up late last night, and you're really exhausted this morning. You yawn several times during a phone conversation and sound uninterested to a caller.

Listen to your voice and analyze how it reflects your moods. Activity 4 tells you how to hear your telephone voice.

## Act out your mood

4

**Activity 4.** Jamal works at Lloyd's Store as a sales assistant. He receives the call shown below.

1. Choose a partner and role-play the script for your classmates. Represent one of these four moods: tired, angry, phony, frightened. Ask people to guess your mood. If you have access to a phone, use it as a prop. After each role-play, ask classmates to describe the impression Jamal gives about Lloyd's Store. Ask how they would react if they were customers.
2. With your role-playing partner, write a new script for this call. Include good telephone techniques from this bulletin.

### Script

Employee: Lloyd's Store. This is Jamal speaking.

Caller: Oh Jamal, I hope you can help me. My son was there an hour ago and left his bike helmet on the counter.

Employee: Which counter? We have three, you know.

Caller: I'm not sure, I wasn't there.

Employee: Well, what time was it?

Caller: I just told you; it was an hour ago.

Employee: Henry, did you see a kid's helmet?...No, nobody saw it. Could be stolen by now. Give me your name and number. If it turns up, I'll call you.

Caller: It's a purple helmet, and it's brand new.

Employee: Give me your name and number. I've got a whole line of customers waiting.



## Talk with a smile

Some things are unpleasant to hear. No one likes to learn that the doctor is busy or that the car repairs are expensive. You can, however, give negative information in a positive way by turning language around.

How would you feel if you called a store with a question and someone said, "That's not my department"? Wouldn't you wonder why the individual couldn't take the time to transfer you to the proper department or ask someone who might know the answer?

Activity 5 lets you practice turning negative language into positive language.



5

### Making the negative positive

**Activity 5** lists negative and rude statements. Make them positive. Then imagine how much nicer they will sound if you say them with a smile in your voice! The first two examples have been completed for you.

1. a. "We closed 5 minutes ago."  
b. *"I'm sorry, but we just closed. We'll open again at 9 a.m. tomorrow."*
2. a. "What do you want to talk to her about?"  
b. *"May I tell her why you're calling?"*
3. a. "That's not up to me to decide."  
b. \_\_\_\_\_
4. a. "Didn't you call earlier?"  
b. \_\_\_\_\_
5. a. "Call back after lunch."  
b. \_\_\_\_\_
6. a. "It was sent yesterday!"  
b. \_\_\_\_\_
7. a. "That will never make our budget."  
b. \_\_\_\_\_
8. a. "There are many people ahead of you."  
b. \_\_\_\_\_
9. a. "We don't deliver that far."  
b. \_\_\_\_\_
10. a. "I don't know. Better ask someone else."  
b. \_\_\_\_\_

# Quicksand calls

Employees are not always to blame for negative conversations. Some customers believe it's okay to be rude. Dealing with these callers can be like sinking into a patch of quicksand. The harder you try, the deeper you sink.

Quicksand customers blame you for a problem, then start to argue. You forget you're on the job and start to argue back.

When you're caught in a "quicksand conversation" with a customer, it's easy to say the wrong thing. The more you struggle with the caller, the deeper you sink into the quicksand. There are ways, however, to avoid the murky depths:

- **Transfer the call to the right person.** People dislike repeating their reason for calling over and over.
- **Hear them out.** Customers may have a right to be angry. Listen carefully to their complaints without interrupting.
- **Offer help.** "Would you like me to send you a new copy of the warranty?" or "May I take a moment to look for the file?"
- **Be informed.** Keep the latest information at your fingertips. For example, if your store is having a sale, know the specific details.
- **Overlook the caller's bad mood.** Your caller probably doesn't know you and isn't directing anger at you personally.
- **Stick to the facts.** "Let me make sure we get all the facts. You ordered the merchandise on Thursday. You sent a money order for \$18.46 with the order."
- **Apologize.** Yes, apologize even though you or your company may not be at fault. Many customers calm down as soon as you apologize.
- **Be sympathetic.** Show you understand the caller's complaint. "I understand that you expected your stove to be repaired properly the first time, Mr. Hernandez. I know how upsetting it is when something that is supposed to be fixed breaks down again."

*"I can't believe you people! How do you run your business, anyway? I have never been treated so rudely in my life!"*

*"Can't you do anything right? I asked for a copy of my bill three weeks ago and I still haven't gotten it!"*

*"When will I get my refund check? I've waited for it long enough! I may never do business with you again!"*



- **Assure the caller that a change may be possible.** Listen carefully to your caller's complaint. Tell the person that you will discuss the problem with your boss, and, if possible, what changes will be made. Then tell the caller that you will call back to confirm the changes. Don't forget to make that call!

Most angry callers will be pleased that you've taken the time to listen, that you've apologized, and that you want to help them receive better service—especially if you've spoken in a kind, smiling voice!



## 6

Then, rewrite the script to avoid negatives and arguments. Compare your story with a partner's. Read the stories aloud to each other and offer suggestions for improvement.

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

## Take a message, please

The messages that come into an engineering firm, medical facility, retail store, airline office, or any other type of business form the link between the company, customers, suppliers, and outside agencies. An incorrect or lost message costs dollars, hurt feelings, and, in the worst case, a blot on the employment record of the person who took the call.

Specific techniques exist for handling incoming calls. Because every employer has preferences, you should determine how calls are to be dealt with in your company. If you answer the phone for other people, it is especially important to learn the wishes of each one.

## Here's my message

Always offer to take a message when the person receiving the call is out. Ask the caller to explain any details you do not understand. Take time to repeat the messages and verify all spelling. If a callback is indicated, say, "I'll ask Mrs. Askew to call you when she returns. I expect her about 3:00." Make a record, even if there is no message to report.

To Maria Cortese ③  
Date 9/6/xx ① Time 4:20 A.M. ② P.M.

## WHILE YOU WERE OUT

M Matt Wyman ④  
Of Randolph & Dwyer ⑤  
Phone (215) ⑥ 555-4386 420

Area Code	Number	Extension
TELEPHONED	<input checked="" type="checkbox"/>	PLEASE CALL <input checked="" type="checkbox"/>
CALLED TO SEE YOU	<input type="checkbox"/>	WILL CALL AGAIN <input type="checkbox"/>
WANTS TO SEE YOU	<input type="checkbox"/>	URGENT <input type="checkbox"/>

☐ RETURNED YOUR CALL ☐

Message He is unable to keep his appointment tomorrow. Please call to re-schedule. ⑦

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BJS ⑧  
Initials

When the caller will not leave a name or message, record the conversation anyway. Write a note on the callback form telling the time of the call and of the caller's refusal. For example, your message might read, "This man wanted to talk to you personally and would not leave a message."

Eight pieces of information are needed for every callback. A standard callback form and procedures for taking messages are shown below. Compare the procedures with the information shown on the form.

## Procedure for taking callback messages

1. Write the date.
2. Write the time of the call.
3. Write the name of the person called.
4. Write the caller's name.
5. Write the caller's company name.
6. Ask for the caller's business telephone number and home phone number, if needed.
7. Write the message in complete detail.
8. Write your initials.

## Record of callback messages

Unless your memory is extraordinary, you will not remember all the messages you take. Develop a log for recording important messages that you take for others in your workplace. Some companies buy books of telephone message forms that are carbonized on the back. The original message can be left with its recipient and a second sheet kept in the book for reference.

## Factoids

- 60% of the impression we make on the telephone comes from tone of voice and choice of words.
- 75% of all business callers do not reach their party on the first try.
- Over a billion telephone lines will be installed around the world.

## What you need near the telephone

**P**eople who use the telephone at work take messages and give information to callers. For convenience and efficiency, have these items in your telephone answering area.



- message pads
- pens
- paper clips
- pencils
- list of frequently called numbers
- company telephone directory
- public telephone directories
- Post-it™ notes
- FAX number for your company
- company policies and rules
- price lists
- opening and closing times

## Close-up: telephone talk

**G**ino's pizza is the best in town. Besides the great taste, Gino offers weekly specials. Prices are cheap compared to those of other pizza shops. Gino also spends a lot of money on advertising, but sales are low. He barely gets by, while his competitors are raking in the profits.

One night while his assistant is at the cash register, Gino answers the telephone. The angry caller sounds like an elderly person.

"I got the wrong order," she says, "and I waited over an hour for it! This food's cold, and I don't like anchovies!"

Gino makes a new pizza and delivers it personally. The woman meets him at the door.

"I almost stopped getting your pizza on account of mistakes like this," the woman tells Gino. "And every time I call to complain, the person on the phone is rude. If I didn't like your pizza so much, I'd stop ordering altogether!"

During Gino's drive back to the store he realizes he has to make some changes in the way he manages telephone sales. He decides he has to do more than just make great pizza and advertise it well.

### Finish this story

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**Activity 7.** Describe the changes you believe Gino needs to make in order for his pizza store to be a success.

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# Coping with information

The world is afloat in information, most of which can be obtained lightning fast by telephone. Sometimes a telephone works in combination with other technology, such as a computer modem, FAX machine, satellite, or fiber optic cables. These are advanced forms of technology that gather information from around the world and deliver it quickly to a designated person or company. Other more sophisticated forms of telephone communications are being developed every day.



Cell phones have been one of the fastest growing phenomena in recent memory. Think how you and your friends stay in touch by cell phone throughout the week. Cell phones also play an important role in business—from salespeople who keep in touch with their customers from the road as they travel to co-workers who maintain communication as they perform tasks in different cities. Learning a few guidelines for business cell phone use is important:

- Pull off the road to phone if you are driving.
- Make sure you are in a good reception area before making a call.
- Refrain from calling if you do not have time to complete the conversation.
- Ask if you may call back if static becomes a problem.
- Charge your battery when it runs low.



## Wrap-up: a summary

- American businesses rely more and more on the telephone for doing business.
- Anyone can learn good telephone skills.
- A telephone conversation can create the first impression of a company.
- Telephone voices often reflect our moods.
- Posture and facial expressions affect your telephone voice.
- Have notes ready before making a business call.
- When dealing with angry callers, remember to hear them out, apologize, be sympathetic, and assure them that a change may be possible.

## Speaking, writing, doing

Now you have a chance to practice what you have learned. The following three exercises ask you to apply your new skills. Do your best work as you practice.

**1 Help! I'm sinking.** Write a script of the conversation you will have with a customer who makes the following quicksand call to the heating and air conditioning company where you work. Role-play your conversation with a friend for the class.

Please get here right away and fix my air conditioner. I'm sweltering, and you have promised for weeks that you will be here to fix it. You have missed four appointments, and I'm really angry. Tell me when you can come, and I will be here also.

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.



## Speaking, writing, doing

**2 I'm watching you.** Observe five telephone users in the offices at your company or your school. List their strongest and weakest points. Analyze what you learned and write a short paper about your conclusions. Include recommendations that would be helpful to the phone users.

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

## Speaking, writing, doing

**3 Telephone manners.** Use the form below to record your impression of four types of businesses. Call each of the stores named or a suitable substitute. Ask the questions listed below and any other questions you think are important. Complete the form; then prepare a three-minute talk on which store made the best impression and why.

Questions:

- What hours and days are you open?
- What is your policy about returning merchandise?
- What is your credit policy?

Telephone manners

	No. of times transferred	No. of questions employee answered	No. of times put on hold
1. _____ Bank Name	_____	_____	_____
2. _____ Pharmacy Name	_____	_____	_____
3. _____ Department Store Name	_____	_____	_____
4. _____ Laundry Name	_____	_____	_____

**My first impression of each business:**

**Rate your impression of each store from 1 to 5, with 5 being best:**

1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____

**4 Thanks for your message.** You work as an assistant in the loan department of a bank. Maria Jarvis sits at the desk across from yours. She left her desk for a moment, and when her phone rings, you answer it. The caller is Dave Goldberg. He says he came in a few days ago to talk to Maria about getting a car loan because his old car was almost ready for the junk heap. Maria took some information from him and said she would get back to him yesterday. Maria never called and today his car died on him. Dave is rather upset now; he needs to buy another car but can't do it without the loan. He knows his credit is good and can't understand why the loan process is taking so long. He says it is very important that Maria call him back immediately. His phone number is 610-555-7478. Write the message.

To: \_\_\_\_\_

Date: \_\_\_\_\_ Time: \_\_\_\_\_ A.M. / P.M.

**WHILE YOU WERE OUT**

M: \_\_\_\_\_

Of: \_\_\_\_\_

Phone: \_\_\_\_\_

Area Code	Number	Extension
TELEPHONED	PLEASE CALL	
CALLED TO SEE YOU	WILL CALL AGAIN	
WANTS TO SEE YOU	URGENT	

RETURNED YOUR CALL ☐

Message: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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\_\_\_\_\_

Initials \_\_\_\_\_