



TIPS

Front-line telephone etiquette

Helpful hints:

- When you take a call, stop everything else that you are doing. Don't allow other distractions to take your attention away from the caller.
- Never eat, drink or chew gum while on the phone.
- Always speak slowly and clearly. Avoid unnecessary jargon and acronyms.
- Remember that English/French may not be the caller's first language and that they may have difficulty understanding you or expressing themselves.
- Always have a pen and paper within reach so you can take notes.
- Answer calls by the second or third ring.
- Smile when you answer your calls, even though the caller can't see you. They'll hear the smile in your voice.
- Be enthusiastic and respectful.
- Remember that you may be the first and only contact a person may have with your business, and that first impression will stay with the caller long after the call is completed.
- Practice good listening skills – listen more than you talk.
- Avoid interrupting while a caller explains their question or problem. Instead, write your point or question down and wait until they're finished explaining before you interject.
- Use hold button when leaving the line so that the caller does not accidentally hear conversations nearby.
- If you need to put the caller on hold, ask if you may do so and wait for their reply before you push the hold button. When you return to them, thank them for waiting, using their name if possible. ("Mrs. Smith? Thank you for holding.") Do not leave a caller on hold for more than 30 seconds before checking back.
- If the caller asks for information that is not the responsibility of your department or organization, try to help them by providing the information, the toll-free number or the website of the appropriate organization. Leave the caller with a positive experience.
- If the phone is located in a lobby or common area, do not use the speakerphone feature.
- When transferring a call, be sure to tell the caller where you are transferring them and the name of the person to whom they will be speaking.
- Thank the caller for calling at the end of every call.

If you are responsible for both walk-in and phone customers:

- Walk-in customers should take priority over phone calls and other work. If the phone rings while with a walk-in, tell them that you must answer the call before doing so. If the phone call is not an immediate transfer, it may be appropriate to put the caller on hold to finish with the walk-in customer.
- If someone walks in while you are on the phone, look up, smile and acknowledge them non-verbally to let them know that you'll be with them as soon as possible.

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Resolving problems / complaints over the phone:

- Practice good listening skills to help discern the caller's problem. Listen more than you talk.
- If there is a problem, be concerned, empathetic and apologetic.
- Keep your tone positive.
- If you have the authority and if appropriate, ask the caller how they would like the problem to be resolved. If you can't resolve the problem the way the customer requests, tell them what you can offer and provide alternatives.
- Don't use words like "can't", "don't" or "policy". Explain what you can do and work with the caller to find a solution through active listening.



Handling rude or impatient callers:

- Keep calm and try to remain diplomatic. Getting upset will only make the caller angrier.
- Remember there is a reason why this person is irate. Try to sympathize with the caller.
- Try your best to resolve the issue at hand using the above steps (resolving problems/complaints over the phone).
- Be firm with your answers but remain polite.
- If the caller remains very upset and you feel unable to continue the conversation, it is better to pass along the caller to a co-worker or offer for you or someone else to call them back, rather than risk losing your temper. Sometimes the caller may be calmer after "venting" some of their frustrations.

Recording and checking voicemail messages:

- When recording a voicemail message, speak using your telephone voice – slowly, clearly and with a positive, but respectful tone.
- Check messages daily and return them within 24 hours. Callers should feel comfortable that your organization checks its voicemail daily.
- Reply, forward, or delete messages immediately. Keep the mailbox clean. Saved messages kept longer than a week take up need-less space in your mailbox.
- If you forward a message, be sure to explain to the person to whom you are forwarding the message why you are sending it to them.

Instead of	Tell the caller
"He is out / busy"	"He is not in at the moment. I expect him to return after 2:30 / tomorrow / etc. Would you like to leave a message on his voicemail?" If the call is urgent, offer "He is out for the remainder of the day and is unreachable. I can transfer you to Tammy who can assist you in his absence."
"I don't know"	"That's a good question. Let me find out for you". If you can find the answer quickly, ask if you can put them on hold while you do so. If you can't find the answer quickly, tell them so, ask if you can take their phone number, and tell them when you or the most appropriate contact person will call back with the answer.
"Hold on"	"Would you mind holding for a moment?" (And wait for their answer.)
"Who is this?"	"May I ask your name please?" or "May I ask who's calling?"
"We can't do that"	"I believe we can offer (alternative). Will that work for you?" or "I'm sorry about that. What can we do to rectify the situation for you?"
"No"	Try to find a way to resolve the situation positively. The customer is not always right, but he or she is always the customer and you always want to leave them with a positive experience. Try to think of alternatives.

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