

**Phone etiquette training**

- 1 The need for phone etiquette: first impressions.
- 2 It takes less than three seconds to make your first impression.
- 3 Are you making a good one with how you answer the phone?
- 4 In the next few minutes we're going to share some ways to transform your caller experience and deliver the best possible first impression.
- 5 Transforming your caller's experience.
- 6 Answer promptly, before the third ring.
- 7 When your phone rings, someone has made the effort to reach out to your company.
- 8 Answer the call promptly with an attitude that shows you care that they called.
- 9 Your attitude will be reflected in the tone of voice you use.
- 10 Before picking up the receiver, discontinue any other conversations or activity that could be heard by the calling party.
- 11 Callers are put off by hearing the tail end of your conversation or loud noises as you pick up the phone.
- 12 The ringing phone is a sign that you're about to interact with a potential client.
- 13 Use a succinct greeting.
- 14 Make sure your caller knows the company they've reached and your name.
- 15 And remember: if you make a good impression now, you'll have time to tell them all the other things you offer later.
- 16 Don't try to cram them all into the first greeting.
- 17 If the caller accidentally reached you instead of someone else at your company, be courteous and helpful.
- 18 Sometimes they've been transferred all over the company with a simple question.
- 19 If possible, attempt to find out where they should call or to whom they need to speak.
- 20 They will greatly appreciate it.
- 21 If you can solve their issue or answer their question, even if it's not your normal job, you've just won a customer for life.
- 22 Learning to listen.
- 23 It starts with listening.
- 24 Listening carefully promotes outstanding customer service, so seek to understand.
- 25 Allow the caller to finish his or her sentences, and don't interrupt.
- 26 Show concern for their question or problem.
- 27 Don't be defensive.
- 28 Rather, say things like, "I understand," or "I'm sorry to hear that."
- 29 Once you feel you do understand, reflect the key points back to the caller and ask additional questions if you need clarification.
- 30 Repeat critical information, so you both will be clear.
- 31 Placing callers on hold.
- 32 Ask the callers permission to place them on hold.
- 33 Many times we've all been told to hold with no thought as to the reason for our call.
- 34 Make sure it's okay to place the caller on hold.
- 35 They may just want to call back later.
- 36 Be aware of what they hear while they're waiting on hold.
- 37 This is an important area that a lot of companies overlook.
- 38 Continue the connection with your caller by providing a custom on-hold message during their wait time.
- 39 Does the music and messaging they hear draw them into your company?
- 40 Is the volume too loud or too soft?
- 41 Are the messages relevant to your callers?
- 42 On-hold messages can be a terrific way of continuing the conversation with your caller even if you can't be on the phone.
- 43 Transferring callers.
- 44 When transferring a call, be sure to explain to the caller that you're doing so and where you are transferring them.
- 45 Take the time to do an assisted transfer, and pass along as much information as possible to the next person.
- 46 It's very frustrating to have to repeat your request each time you're transferred.
- 47 Your caller will be much relieved to find out they don't have to repeat their information or request each time they're transferred to someone new.
- 48 Managing multiple lines.
- 49 Don't forget who was first.
- 50 If you're on a line when a second call comes in and you need to answer it, ask the first caller to hold, answer the second call, and ask if they'll be able to hold while you complete the call ahead of them.

- 51 Wait for their response.
- 52 They may want to be transferred to someone, and you can do that quickly without making them wait.
- 53 Ideally, you'll have a system in place where you won't need to interrupt the first call to answer the second call yourself.
- 54 This could be another staff member, or an automated attendant.
- 55 But, no matter what, remember that you're already conducting business with the first caller.
- 56 Don't make them feel second rate.
- 57 Be ready to take notes.
- 58 Always keep a pen and paper near you phone so you can easily take notes if need be.
- 59 Handling difficult callers.
- 60 At some point many of us will be faced with handling an angry or upset caller.
- 61 What an opportunity to turn this into a positive experience for them!
- 62 Use the caller's name and give them your name.
- 63 There are ways to say things that will escalate the caller's anger, and there are ways to answer them that show that you understand their frustration.
- 64 Here are a few examples.
- 65 Never say, "I don't know," "That's not my job," "That's not in the contract," or "You're wrong."
- 66 Instead say, "That's a good question. Let me find out for you," "I'm not sure. Let me find someone who knows," "Let me check into how we can help you with that," or "Here is what I understand."
- 67 When customers feel understood, they generally will calm down, especially if you stay calm.
- 68 Try to remain polite and diplomatic, and always show willingness to resolve the problem or conflict.
- 69 Try to think like the caller, and remember: their problem is important.
- 70 Screening calls.
- 71 We sometimes joke about screening calls, but there are certainly times when it's appropriate.
- 72 If you're responsible for answering calls for someone else, consider these points.
- 73 Ask the caller, "May I tell him or her who is calling?"

- 74 If appropriate, ask what the call is in regard to.
- 75 Ask the caller to hold; then connect to the called party.
- 76 If the called party is available to take the call, pick the caller back up, and let them know you'll be transferring them to the called party.
- 77 If the party is unavailable, ask the caller if they would like to be transferred to voicemail, or if you may take a message by hand.
- 78 Don't assume they want voicemail: always ask first.
- 79 Your interactions with callers are incredibly important.
- 80 It's their only vision of your company.
- 81 And how you handle their call and their request will either make it a great experience for them, or may turn them to your competition.
- 82 Whether answering the phone or making phone calls, being proper and polite will send a professional message and make a great first impression.
- 83 You'll also find that others treat you with more respect and are willing to go out of their way to assist you, if you use proper etiquette.
- 84 We hope these points you've reviewed have been helpful in presenting a positive image over the phone.
- 85 If you'd like to know more about in-person caller experience training, click on the form below, or call Prosound at 877.677.6768.