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INNOVATION | TALENT | EXCELLENCE

Communication Skills
Phone Etiquette



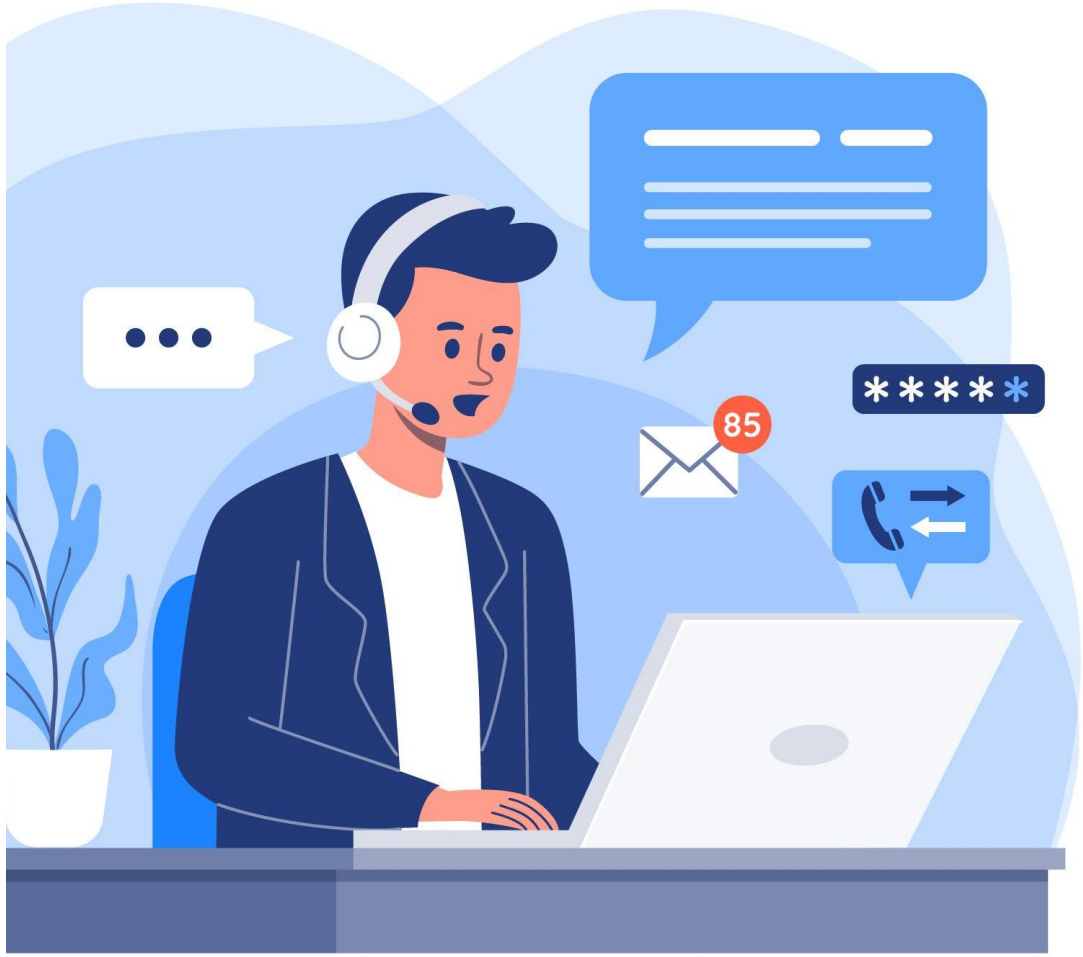
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Agenda

1. Telephone Behavior
2. Answering/Making calls
3. Tips and Notes

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1. Phone Etiquette



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Phone Etiquette
Telephone Behavior

MAKE A POSITIVE IMPRESSION

- Impressions are formed quickly, be mindful of the impressions you project.
- Creating a positive impression with clients forms a positive impression of the company as a result.

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Phone Etiquette
Telephone Behavior

BE ON STAGE

- Keep your personal feelings and moods separate from your professional demeanor.
- View your time on the phone as being on stage.
    - Actors have to perform whether they're having a good or bad day.

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Phone Etiquette
Telephone Behavior

ANSWER/CONDUCT THE CALL PROMPTLY

- Answering/making a call promptly conveys a strong message that you and your company are more efficient.

BEING ON TIME IS LATE

- Don’t postpone your responsibilities till last minute. Get your work done in advance.

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Phone Etiquette
Telephone Behavior

MINIMIZE HOLD/PAUSE TIME

- Holding/pausing an active call for extended periods of time causes frustration.
- Check back with the client every minute or less.

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Phone Etiquette

Telephone Behavior

ANNOUNCE YOUR NAME AND BE FRIENDLY

- Give your name to clients, it shows a willingness to help.
- Always start with a friendly, helpful attitude.

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Phone Etiquette
Telephone Behavior

SPEAK CONVERSATIONALLY

- Make your voice pleasant and eager.
- Be a listener and conscious of the client's voice tone.
- A caring tone makes the difference in the caller's attitude towards you and the company.

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Phone Etiquette
Telephone Behavior

MONITOR YOUR VOICE TONE

- Voice tone is a truthful indicator of the mood you're in.
- ***Smile***. Smiling is the fastest way to improve your voice tone.

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Phone Etiquette
Answering calls

ASK PROBING QUESTIONS

- Gain information
- Don’t jump to conclusions
- Focus on the conversation
- Reach an agreement
- Closure process

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Phone Etiquette
Answering calls

INFORM BEFORE TAKING ACTION

- Avoid causing frustration by informing the client what you're going to do before doing it.
- Whether you're pausing the call or taking over remote control, let the client know and ask gently.

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Phone Etiquette
Answering calls

KNOW YOUR RESOURCES AND TAKE FULL OWNERSHIP

- Being knowledgeable of products, services and the role of each person maximizes control over the conversation.
- Allows you to deal with problems and requests and provide possible options to the client
- The last thing you want to convey is ignorance.
- Assume ownership on the case/issue at hand, do not forward/delegate to someone else.

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Phone Etiquette
Answering calls

TYPES OF CALLS

- Determine the type of call you'll handle to quickly resolve the client's problem
  - Complaint
  - Request/inquiry for general information
  - Questions on how to use a service
  - Technical issues

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Phone Etiquette
Answering calls

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OBJECTIVES WHEN ANSWERING CALLS

- Have all your resources available before answering
- Answer promptly
- Identify yourself
- Be friendly, ***use the client's name***
  - **Do not address them with "dear", it's informal and disrespectful.**
- Express your willingness to help
- Gather as much information as you can

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Phone Etiquette
Answering calls

OBJECTIVES WHEN ANSWERING CALLS

- Indicate your regret/appreciation when applicable
- Be understandable in your communication
- Be accurate when giving information
- Be easy to deal with
- Don’t interrupt your client
- Hang up gently

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Phone Etiquette
Answering calls

MEETING MINUTES

- Prepare your Meeting Minutes after the call.
- Email the Meeting Minutes to the client.

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Phone Etiquette
Answering calls

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MEETING MINUTES – Template:

Hi [client],

Thank you for making the time to meet!

For reference, I've compiled the notes from our call below. If you have any questions, or if I've overlooked or misremembered something, please let me know.

We will send another follow-up as soon as we have new information but no later than YYYY/MM/DD

Meeting Minutes/Recap: [Text]

Date and Time: YYYY/MM/DD HH:MM AM/PM

Attendees:

- Employee 1

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Phone Etiquette
Answering calls

MEETING MINUTES – Template cont.:

Items reviewed and discusses:

- Item 1
- Item 2

Investigation / Troubleshooting steps:

1. Step 1
2. Step 2

Follow-up Action Item(s):

- [Owner | Action Item | Due date]

Best regards,

Employee

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Answering calls – Example 1

INFORMATION REQUEST

1. Identify yourself and colleagues if they're present
2. Confirm and repeat the request
3. Express your willingness to help
4. Restate the question
5. Answer the question
6. Conclude the call

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Answering calls – Example 2

COMPLAINT

1. Identify yourself and colleagues if they're present
2. Record the type of complaint
3. Restate the problem
4. Express regret and a willingness to help
5. Resolve the problem
6. Conclude the call

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Phone Etiquette

Answering calls – Example 3

LONG-WINDED CLIENT

1. Ask questions to focus the client's attention
2. Set the course of the conversation
3. Paraphrase, reflect and close.

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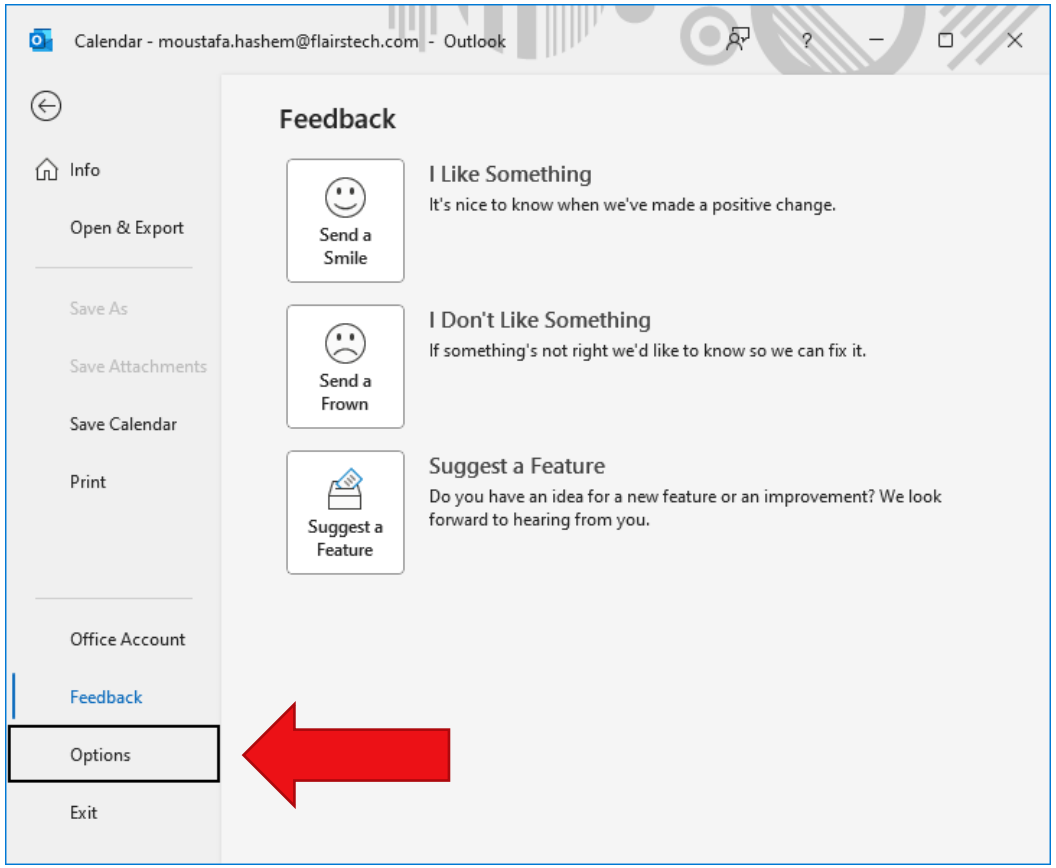
Phone Etiquette
Tips and Notes

- **Consider time-zone differences**
  - Add timezones to your Outlook calendar for your own reference.
  - Use ***worldtimebuddy.com*** to calculate timezone differences if needed.
  - When scheduling a meeting:
    1. Use the timezone feature in Outlook
    2. Select the recipient's timezone
    3. If needed, refer to the calculated timezone on **worldtimebuddy**.

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Phone Etiquette
Tips and Notes

- **Consider time-zone differences (Outlook)**

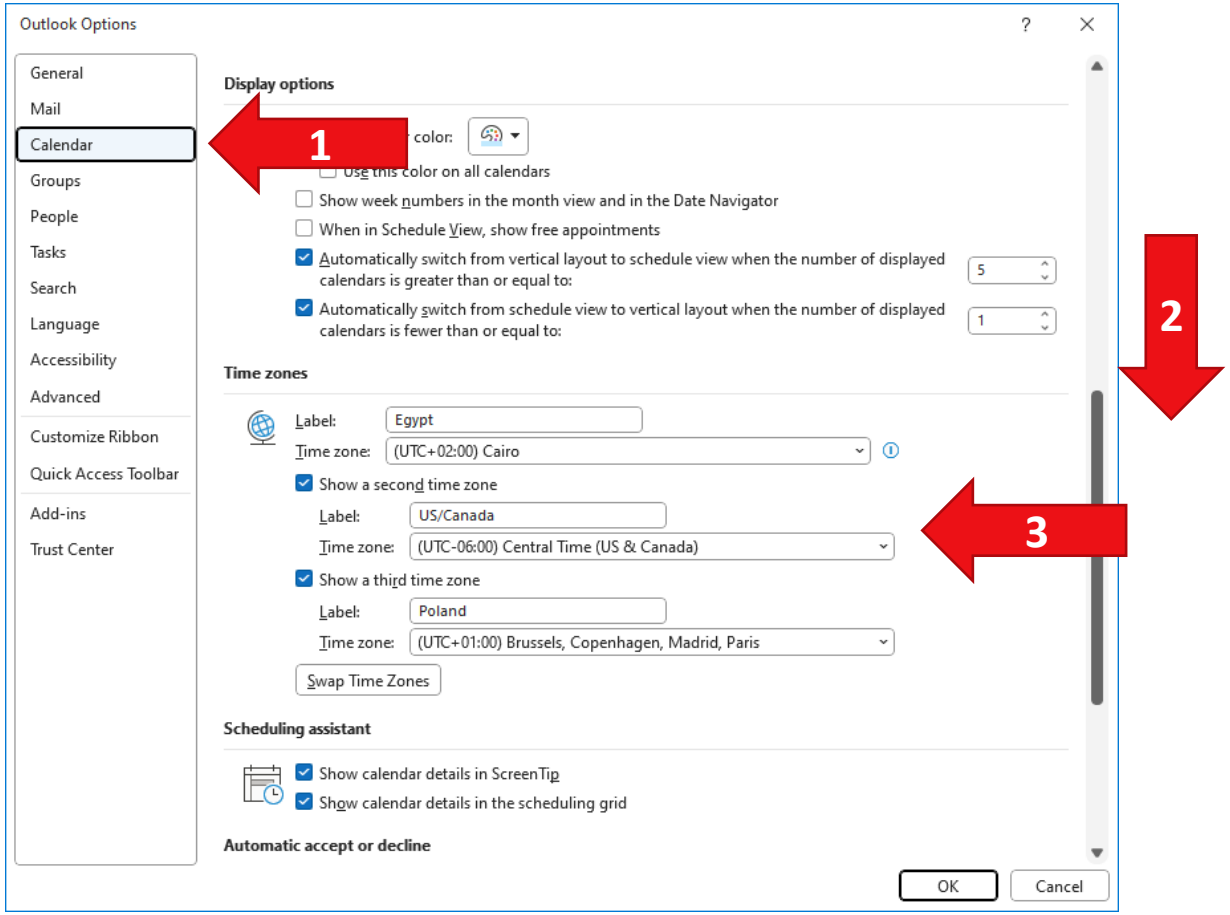


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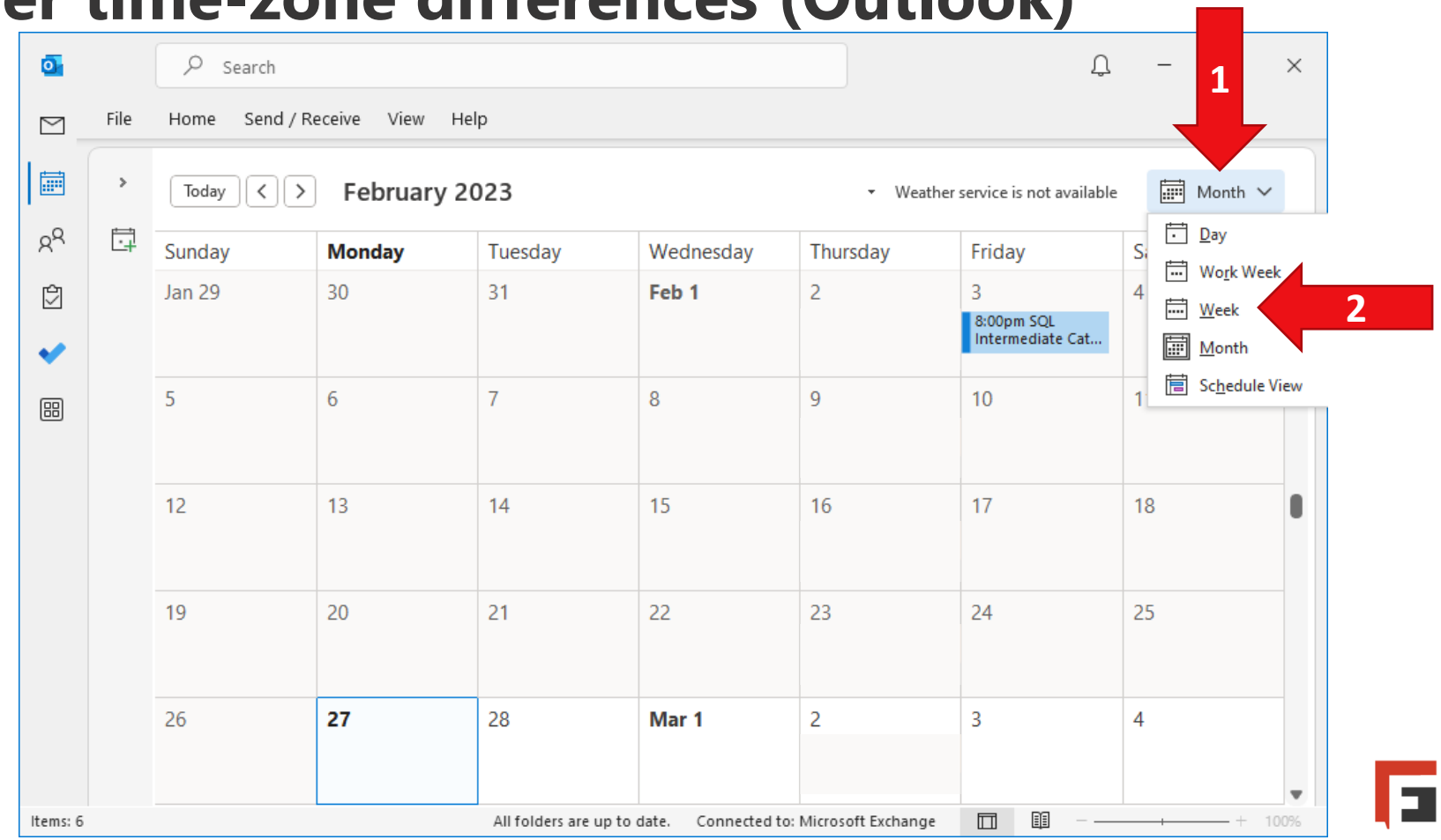


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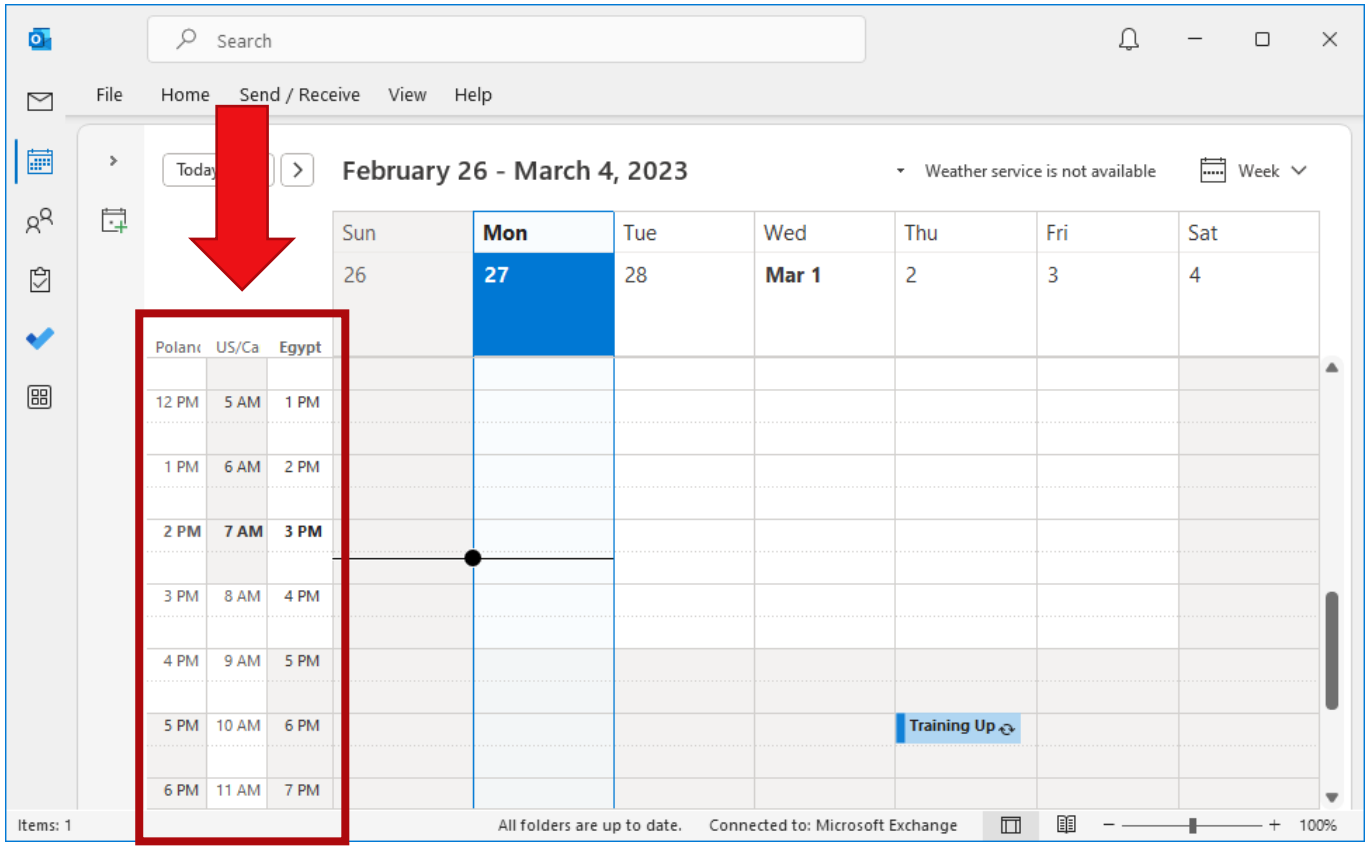


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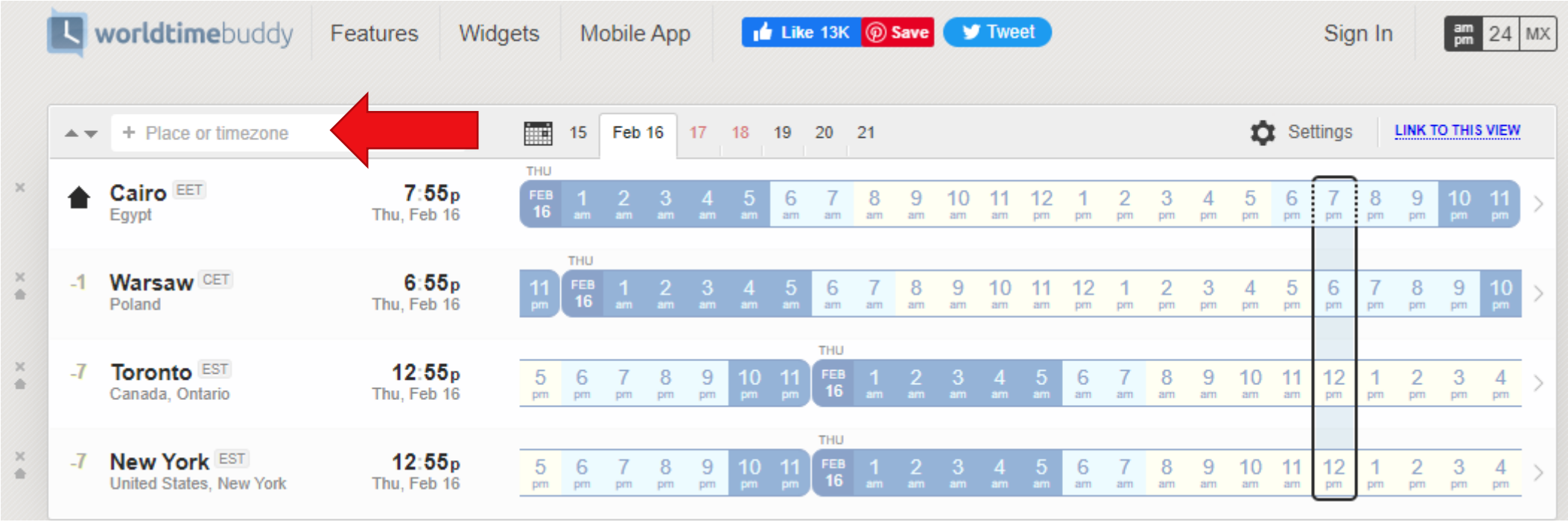


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Phone Etiquette
Tips and Notes

- **Consider time-zone differences (worldtimebuddy)**



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Phone Etiquette
Tips and Notes

- Gently request the client to do something (sharing screen)
- Inquire what the problem is
- Gently ask to check the cause of the problem

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Phone Etiquette
Tips and Notes

- Direct the client step by step in a gentle matter and explain why these steps are being performed
- Explain what the problem was, how it was resolved and in the future what can be done in case the problem repeats

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Phone Etiquette
Tips and Notes

- Keep a friendly and warm tone, allow the client to be comfortable.
- Instead of saying “Just a second...”, try saying what you’re doing and talk the client through what you’re attempting to do.

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Phone Etiquette
Tips and Notes

- Have a conversation with the client. Be warm and comforting but stay professional.
- Ask probing questions to gain more information out of the client to further investigate the origin of the problem and solve it.

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Phone Etiquette
Tips and Notes

- Speak in a clear manner, do not mumble or whisper. Try to be energetic and attentive
- If the problem is going to take some time to solve, conclude the call and reschedule the meeting, giving a definitive date.

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Phone Etiquette
Tips and Notes

- Sympathize with the client and express regret/appreciation where appropriate
- Don’t speak in a monotonous manner, be more alive and engaging

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Phone Etiquette
Tips and Notes

- As you conclude the call, summarize and go over the steps taken with the client.
- Gently indicate that you're eager to hear the client's feedback on the problem's solution and closing the ticket.
- Prepare the Meeting Minutes right after the call and send it over email.

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Questions?