

Are you with me?

Common Courtesy On the Phone

CMD Publishing
(503) 294-9979

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PREVIEW

tent of this workbook, as well as how you can use the book with the video, and for individual or group study.

- The "Introduction" chapter presents the overall theme of the workbook: the importance of communicating with the caller as if they were in the same room with you. It also explains how you can be most effective on the phone by carefully understanding and keeping to your role within your organization.
- Chapter 1, "Making a Call," gives you techniques for making a call in a way that will help you accomplish your purpose.
- Chapter 2, "Taking a Call," provides techniques for taking a call in a way that respects the caller and responds to their needs.
- Chapter 3, "Redirecting a Call," will help you handle a call when you can't respond to it immediately, either by putting the caller on hold or by transferring the call.
- Chapter 4, "Voice Mail Messages," teaches you how to leave a clear message in another person's voice mail box, or record an effective outgoing voice mail message.
- Chapter 5, "Taking a Phone Message," will help you take a message in a way that reassures the caller and records important information.
- Chapter 6, "Handling Dissatisfied Callers," provides you with specific techniques for handling an angry or dissatisfied caller and addressing their concerns.
- Chapter 7, "Managing Calls Effectively," teaches you how to accomplish your goals on the phone by listening carefully, directing the conversation, and reining in talkative callers.

Layout: The physical layout of the book is designed to make it convenient to use. Information has been divided into small chunks, allowing you to pick up and put down the book without losing the flow of the learning. Simple margin icons help you find what you're looking for, and recognize the work you are being asked to do as you move through each chapter.

USING THE WORKBOOK WITH A LEARNING GROUP

Assign a point person to organize the learning group, facilitate each session, and follow-up as needed when the session is over. This person should have basic facilitation skills, as well as an understanding of the material to be covered.

The following tips will help the facilitator set up the learning group so that participants get the most out of their experience.

Create an Agenda for Each Session: To prepare for each session, the learning group facilitator should read the material that will be covered and prepare a detailed agenda. A typical learning group session of 90 minutes might include:

Introduction **15 minutes**

- Review the agenda
- Participants discuss how they have been using what they learned during the previous session/what they've noticed as a result of the last session

Unsuccessful Call **15 minutes**

- A participant summarizes the unsuccessful call
- Participants share their answers to "Think About It" questions for the unsuccessful call
- The group discusses similar situations/experiences from their own work lives

Successful Call **15 minutes**

- A participant summarizes the successful call
- Participants share their answers to the "Think About It" questions about the successful call
- The group discusses similar situations/experiences from their own work lives

"How to ..." Section **15 minutes**

- A participant summarizes the main points in the "How to ..." section
- Other participants add to what the first participant said
- The facilitator directs the group's attention to any points that have been missed
- The group discusses their reactions to this information

- Explain the process you will follow in each section of the session, and make sure this process is followed. If participants begin to take the conversation off on a tangent, rein them in.
- Keep your questions simple and to the point. Pose open-ended questions, rather than questions which have a “right” or “wrong” answer, or a single “yes” or “no” answer.
- Manage the flow of conversation so that everyone has a chance to speak and feels listened to and valued for their contribution. Acknowledge all answers, and give positive feedback.
- Encourage everyone’s participation by asking for input from people who remain silent, particularly if one or more people are dominating the conversation.
- Encourage participants to answer each other’s questions.

Following up After Each Session: After each session, send out a reminder notice telling participants what they have agreed to do in preparation for the next session and when that session will be.

PREVIEW

GETTING THE MOST OUT OF THIS BOOK

Learning Flow for Each Chapter: The same learning flow is used for each chapter in the workbook. It begins with an overview of the chapter followed by learning objectives and then moves through the following sections: 1) unsuccessful call, 2) reflection on this call, 3) successful call, 4) reflection on this call, 5) instruction, 6) application, and 7) practice. This sequence makes learning engaging and effective. What follows is a description of how the sequence works.

Overview of the Chapter and Learning Objectives

The overview provides the learner with a basic understanding of all the material that will follow. It also tells learners what they are expected to be able to do upon completion of the chapter and gives them a context for relating to the unsuccessful call presented next.

Unsuccessful Call

The unsuccessful call engages the learner's interest and helps them connect personally to the topic presented and appreciate why it is important. It gives them first-hand negative experience they can learn from in the moment. In group study, it also creates a shared experience that the group can learn from together.

Think About It

Reflection on the unsuccessful call helps learners relate to the scenario, and realize what they already know about this topic.

Successful Call

The successful call models the skills the learner should take away from this unit of instruction. It gives them first-hand positive experience they can learn from in the moment. In group study, it also serves as a shared experience that the group can learn from together.

Think About It

Reflection on the good scenario helps learners recognize the skills and techniques that were modeled in this version of the story.

How to ...

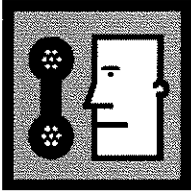
The "How to ..." section formally presents the concepts, skills and techniques that were modeled in the successful call.

Using What You've Learned

This exercise helps learners adapt these concepts, skills and techniques for their own use by analyzing how they would be used in a specific situation.

Practicing What You've Learned

PREVIEW



EXERCISE: THE UNSUCCESSFUL CALL

Imagine a phone call on the job that was unsuccessful.

With whom were you speaking? What did you accomplish during the call?

How did you feel after the call?

Describe your communication with the person on the other end of the line: Did you feel connected to that person? Did you feel far away from them, or as if you were sitting together in the same room?

How might this conversation have been different if you were sitting together in the same room?

THE BIG IDEA: BEING "WITH" THE CALLER

When we're talking with someone on the phone we can't see the other person, so we can't see the meaning behind their words. That's why we have to try even harder to make that personal connection, and work at being even more considerate than we naturally are in person.

The simple way to do this is to treat the other person as if they're right there in the same room with you. Notice how, when you speak with someone in person, you naturally make an effort to connect with them. You need to make this same type of connection when you're speaking with someone on the phone.

Throughout this workbook we'll emphasize this approach, and tell you how you can put it to work when you're: making a call, taking a call, putting a caller on hold, transferring a call, leaving a message on voice mail, taking a phone message, responding to a dissatisfied caller, and managing your phone conversations.

YOUR ROLE ON THE PHONE

The way you interact with someone during a business call is always influenced by your role in that situation. Your role is made up of the following elements:

- What is your job?
- How do you use the phone in your job?
- Is it your job to provide information? If so, what types of information, and to whom?
- What types of information are beyond the scope of your job to provide? Where should you refer these requests?
- Is it your job to gather information? If so, what types of information, and whom are you supposed to get it from? What types of information are beyond the scope of your job to gather, and who within your organization is responsible for this work?
- In a given situation, are you the caller or the person being called? Who are you speaking with? What is the nature of your relationship with that person?

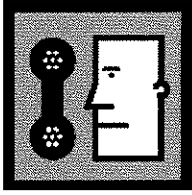
Staying within your role will vary from situation to situation, and from caller to caller. It's important to consider, however, what role is appropriate for you, particularly in pressured or confusing situations.

PREVIEW

IN THIS CHAPTER YOU WILL:

- Read an example of how a call was made unsuccessfully.
- Write down your thoughts about why the call was unsuccessful.
- Read a second example of this call, this time with successful results.
- Write down your thoughts about why the second call was successful.
- Learn some simple steps that will help you make all your calls successful.
- Use what you've learned in a situation in your own life.
- Practice what you've learned.

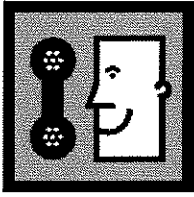
PREVIEW



MEDIA PRODUCTION COMPANY: UNSUCCESSFUL CALL

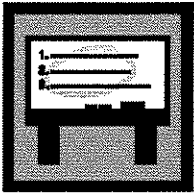
Pegasus Productions is a large media production company. It employs writers, graphic designers, video producers and other professionals to develop media materials such as brochures, videos and multimedia programs. Suzie May is looking for a job as a video production assistant. She calls to talk to the person in charge of hiring after stopping by to leave her resume and speaks first with the receptionist, Sandy.

- Sandy** Good morning, Pegasus Productions.
- Suzie** Hello, um, hi. ... I wanted to speak with the person who hires production assistants, but I've misplaced his name. ...
- Sandy** May I ask who's calling?
- Suzie** Oh, yeah, this is Suzie May. I think I met you when I dropped off my resume. ... It was the one folded into the shape of a camera. ... I've lost the name of the guy I left it for, but it's been about two weeks and I haven't heard from him. ...
- Sandy** Oh, right, I remember your resume. How can I help you, Suzie?
- Suzie** Could you tell me the name of the person I need to speak with, and then connect me to him?
- Sandy** OK, that was Joe Garofolo. I'm not sure if he's available at the moment. ...
- Suzie** Well, um, I'd really like to speak with him. ... Could you connect me with him?
- Sandy** OK, I'll see if he's in.
- Suzie** Thanks. *(She buzzes Joe's office.)*
- Joe** Hello, this is Joe.
- Suzie** Hello, Mr. Garofolo, I don't know if you remember me but I dropped off a resume for you about two weeks ago and I wanted to know if you'd had a chance to look at it and ...
- Joe** Who's calling please?
- Suzie** Oh, sorry, this is Suzie May. So, I was wondering if you have any openings coming up for a production assistant and ...
- Joe** Suzie, I'm sorry to cut you short, but actually I thought this was a conference call with a client that I'm waiting for. So, I'll have to get off.
- Suzie** Um, when should I get in touch with you again?
- Joe** Oh, I don't know, I've got to go, why don't you send me another resume, OK? Thanks, goodbye.



MEDIA PRODUCTION COMPANY: SUCCESSFUL CALL

- Sandy** Good morning, Pegasus Productions.
- Suzie** Good morning. This is Suzie May calling. Is this Sandy?
- Sandy** Yes.
- Suzie** Hi Sandy, I met you when I dropped off my resume for Mr. Garofolo. It was the one in the shape of a camera. How are you doing today?
- Sandy** Oh, hi Suzie! I'm fine, thank you. I put your resume on Joe's desk.
- Suzie** Thank you. I appreciate that. It's a little fragile, so I always feel better when I know it's been delivered where it's supposed to go. May I speak with Mr. Garofolo?
- Sandy** Sure, I'll transfer you. *(She buzzes Joe's office.)*
- Joe** Hello, this is Joe.
- Suzie** Good morning Mr. Garofolo. This is Suzie May calling. I'm looking for freelance work as a production assistant. I dropped off a resume for you about two weeks ago. It was the one folded into the shape of a camera, and it came with samples of my work. ...
- Joe** Oh yeah, I remember — it was sitting on my desk when I came back. Very clever.
- Suzie** Thank you. Do you have a couple of minutes to talk right now?
- Joe** Actually, I have two people in my office and we're waiting for a conference call from a client, so I'll have to get off.
- Suzie** Well then I won't keep you. When would be a good time to chat for a couple of minutes?
- Joe** This afternoon is pretty open. We could touch base then. Why don't you call me after lunch, say, after around 1:30. Just have the receptionist page me if I don't pick up.
- Suzie** Thank you Mr. Garofolo, I'll call you this afternoon after 1:30. I look forward to speaking with you then.



HOW TO MAKE SUCCESSFUL CALLS

When you're making a phone call, you're always doing it for some reason. There are a few simple steps you can follow that will help you accomplish your goals successfully.

To get in the right frame of mind, think about how you feel when you receive a call. What makes you feel good about a call, or appreciate the caller? What bothers you?

As you learned at the beginning of this chapter, making a call should be like making a visit. In one sense, it's all about respecting the other person, and being courteous and considerate. When you visit someone, you have a reason to be going in the first place. You get ready to go, and think about why you're going. When you get there, you're friendly, and if the person doesn't know you, you introduce yourself. If you've stopped by unexpectedly, you explain why you're there, and you ask if this is a convenient time to visit. When you leave, you thank the person for the visit, and if you have specific plans to see them or talk with them again, you usually confirm these plans. Throughout the visit you focus on being with the person and making a personal connection. This is the underlying theme that makes your contact with the person you're visiting successful and satisfying.

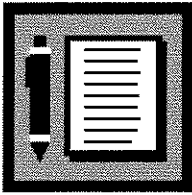
So, how does this translate into making a phone call? Here are the steps you can take to make a successful phone call:

Prepare Yourself — Think about why you're making this phone call, and what you hope to accomplish. Identify any information you want to have at hand when you make the call. If it's a particularly important or complicated call, you may even want to jot down some notes in advance.

Decide to Be Friendly — Check your mood. Attitude is contagious, and you need to be able to project a friendly attitude over the phone. People are much more willing to talk to someone who is pleasant and easy to speak with.

Introduce Yourself — Introduce yourself right away when the person you're calling answers the phone. This is not only necessary to the efficient flow of communication, it's also considerate. The person you're calling needs to know who they're speaking with in order to know how to respond to anything you say.

Explain Why You're Calling — In order to accomplish your goal in the phone call, you need to explain what you want. This explanation should be as brief and as clear as possible to make it easy for the other person to understand and respond, and to use their time efficiently.



USING WHAT YOU'VE LEARNED

Now use what you've learned in the context of a situation in your own life. Just follow these easy steps, and jot down your answers to each question in the space provided.

1. Pick a situation you can think of in the next couple of days when you will need to make a phone call. Any call will do — it doesn't have to be anything particularly important or complicated.

What is the situation? Who are you calling? What is your relationship to this person?

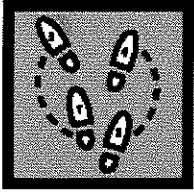
2. Prepare yourself for the call.

Why are you making this call? What do you hope to accomplish? What information do you need to have at hand when you make the call?

3. Decide to be friendly.

How do you feel about making this call?

Make sure you check your attitude before you pick up the phone!



PRACTICING WHAT YOU'VE LEARNED

The best way to practice what you've learned is to practice it out loud.

- We suggest you take the scenario you've just created and do a quick role-play, with you playing yourself, and a friend or co-worker playing the person you're calling.
- Make sure your role-play partner has read your scenario in advance, so they know what their role is.
- You may also wish to discuss with your partner how you'd like them to play this scenario — do you want them to be agreeable or difficult? Relaxed or rushed? Choose a manner for your role-play partner that is true to what you think will happen when you make this call in real life.

REVIEWING WHAT YOU'VE LEARNED: CHAPTER 1 – MAKING A CALL

As you've discovered, the steps for making a successful call are very simple. All you need to do is:

Prepare yourself for the call by thinking about the reason you're calling, and having all necessary information at hand.

Be friendly to the person you're calling, and to whomever else may answer the phone.

Introduce yourself as soon as the person you're calling answers the phone.

Explain the reason for your call after you've introduced yourself.

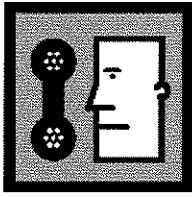
Make sure you're calling at a convenient time and arrange to call back if it's not.

Summarize the call so both parties understand what's been decided or agreed to and **thank the person you're calling** for their time.

IN THIS CHAPTER YOU WILL:

- Read an example of how a call was answered unsuccessfully.
- Write down your thoughts about why the call was unsuccessful.
- Read a second example of the call, this time with successful results.
- Write down your thoughts about why the second call was successful.
- Learn some simple steps that will help you take all your calls successfully.
- Use what you've learned in a situation in your own life.
- Practice what you've learned.

PREVIEW



NURSES' STATION: UNSUCCESSFUL CALL

Barbara is working in the cardiac ward of a large hospital. Currently the unit is understaffed. Barbara is feeling pressured because she needs to attend to a patient and explain to another nurse what is happening with that patient before going off duty. She also has an appointment immediately after her shift. A second patient's husband calls the nurses' station to ask for assistance. The phone rings several times before Barbara picks it up.

Barbara Cardiac.

Bob (*Sounding a little tense*) Hi, this is Bob McDonnell. My wife is in room 326B. I need to get a message to her. Can you deliver it for me?

Barbara Your wife has a phone in her room — I can transfer you to the switchboard and they'll give you her extension.

Bob I tried that. Her phone is busy.

Barbara I'm sorry, we generally don't deliver personal messages for patients. Please call your wife back in a few minutes.

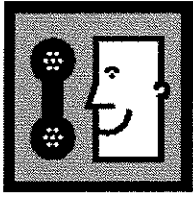
Bob (*Starting to sound irritated*) Her phone has been busy constantly for an hour, I have to speak with her immediately. This is very important.

Barbara I'm sorry, we're understaffed and I can't help you now. Please call your wife back in a few minutes, or try the nurse's station later.

Bob (*Sounding angry now*) Hey, our daughter just had a baby and ...

Barbara Well congratulations! I'm afraid I have to go now! Please try back later. (Click)

Bob (*He redials.*) Hello, I'd like to speak to the manager of the nurses in the cardiac ward ...



NURSES' STATION: SUCCESSFUL CALL

Barbara Cardiac Unit, Nurses' Station. This is Barbara.

Bob (*Sounding a little tense*) Hi, this is Bob McDonnell. My wife is in room 326B. I need to get in touch with her.

Barbara Hello Mr. McDonnell. I'm sorry it took me a minute to get to the phone. Have you tried your wife's extension already?

Bob Yes, her phone is busy.

Barbara (*In an understanding tone of voice*) Well, we generally don't deliver personal messages for patients. Can you call your wife back in a few minutes?

Bob Her phone has been busy constantly for two hours. I wonder if the extension is broken and I'm about to get on a plane. I need to get some information from her right away. This is very important.

Barbara Is it an emergency?

Bob Yes. Our daughter just delivered her first baby prematurely. She's having serious complications. I'm on my way to fly down there. I want to call an old friend who's a specialist and ask him to go see her today. My wife has his number.

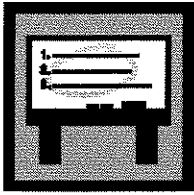
Barbara I'm sorry to hear it. I have something I have to do immediately. I can pass along the message to someone else who can speak with your wife and get the number for you. What's your friend's name? And how long do you have before your plane leaves?

Bob Peter Johnson. I need to board within 10 minutes.

Barbara OK, how about if you call this number back in five minutes — it's 623-2640.

Bob Thank you. I'll call back then.

Barbara Thank you for calling. I hope your daughter is alright. When you call back in five minutes you'll be speaking with Kathy.



HOW TO TAKE CALLS SUCCESSFULLY

There are a few simple steps you can follow that will help you take calls in a way that will serve both you and the person who is calling.

To get in the right frame of mind, think about how you feel when you are making a call. What makes you feel good about the situation when someone takes your call? What bothers you?

As you learned at the beginning of this chapter, taking a call should be like receiving a visit. It's important to consider how you can make the caller feel comfortable, and demonstrate your willingness to meet their needs. When you are about to receive visitors, you prepare yourself to greet them in a friendly and welcoming way. You don't keep them waiting, but usher them in quickly when they arrive. Then you do your best to be responsive to the visitors' reasons for visiting. If you are unable to spend time with your visitors when they arrive, you set up another time to meet, or find someone else who can help them if it's appropriate.

When visitors leave, you thank them for visiting, and if you have specific plans to see them or talk with them again, you usually confirm these plans. Throughout a visit you focus on being with the visitor and making a personal connection. This is the underlying theme that makes your contact with the person who is visiting you successful and satisfying.

So, how does this translate into taking a phone call? Here are some steps that will help you take a phone call successfully.

Decide to Be Friendly — Check your mood before you pick up the phone. When you are friendly and welcoming your interaction with the person calling you flows much more easily and smoothly.

Answer the Phone Quickly — Just as it's not polite to keep someone waiting at your front door, it's not polite to keep someone waiting while the phone rings many times. Answer the phone within three rings or fewer if possible.

Greet Callers — Give callers your name and, if appropriate, the name of your organization or department when you answer the phone. The person who is calling you needs to know that they've reached the correct number. Communicate with your tone of voice that you are happy to speak with them.

Help Callers Explain the Reasons for Calling — When people call, they have a reason — just like they'd have a reason to visit. Your job is to make them feel comfortable and help them explain their reason for calling. You do this by listening and asking questions.

Offer Solutions — Do your best to respond to callers' requests or problems. If you can't help them yourself, help them find someone else who can.

Summarize the Call and Thank the Person Who Called You — Just like you would if you were ending a meeting, summarize the results of the call briefly and simply. This helps to get closure on what has just been accomplished, and remind both parties of what's supposed to happen next. Then, thank