

Are you with me?

Common Courtesy On the Phone

CMD Publishing
(503) 294-9979

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Printed in the United States of America.

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"FRAME OF MIND" LEARNING

Our training media delivers what we call "frame of mind" learning. Our products are designed to give learners both a reason to take part in their training, and a way to remember it. To us, audio/visual media is best suited to just a few "high altitude" tasks. First, a video, CD-ROM or online program must offer learners a frame of mind for the training, a way to think about the lesson content. Second, it must persuade them that they should take part in the training—that what we are trying to teach is worth learning. Lastly, it must provide them with a way to remember what we are trying to teach—a mental framework to easily recall the training when they need it most.

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How to Use This Book

OVERVIEW

The “Are you with me?” workbook is designed to help you successfully manage your telephone communication on the job. Whether you work alone or as part of a team, how you handle yourself on the telephone is an important part of your overall effectiveness as a communicator. To do your job well, you need to be able to use the phone to provide and get information in a way that leaves you and the person on the other end of the line feeling positive about the interaction.

This workbook is written for anyone who uses the telephone in their job. For some, it will provide new information about fundamental telephone skills, while for others it will help solidify their understanding. Everyone can benefit from reviewing these basic skills and techniques that are so essential to being an effective telephone communicator.

LEARNING OBJECTIVES

When you have completed this program you will be able to:

- Make a call in a way that allows you to accomplish the purpose of your call.
- Take a call consciously, acknowledging the caller and responding to their needs.
- Put a caller on hold while clearly respecting their time and getting their approval first for the delay.
- Transfer a caller to someone who can help them in a way that is considerate of both the person who is calling and the person to whom they are being transferred.
- Leave a concise and informative message on voice mail.
- Record an effective and to-the-point outgoing message on voice mail.
- Take a complete and useful message when the person a caller is trying to reach is not available.
- Respond politely and successfully to an angry or dissatisfied caller.
- Manage all your calls in such a way that you listen well, direct the conversation where it needs to go, and gently rein in talkative callers.

CONTENTS

The “Are you with me?” workbook is divided into two introductory chapters and seven numbered chapters.

- “How to Use This Book” is the chapter you are currently reading. It explains the structure and con-

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.

MAKE IT YOUR OWN

You will learn the most from this workbook if you make it your own. We recommend that you take an active role as you read, highlighting key information, using the margins for notes, and writing your answers to the exercises in the spaces provided.

WAYS TO USE THIS BOOK

There are three ways you can use this book: in a learning group, for independent study, and with or without the “Are you with me?” video.

For Learning Group Study: You will get the most out of the “Are you with me?” workbook if you use it in a group study setting. The discussion and exchange of ideas which takes place in a group is invaluable to building a better understanding of the material. Details of how to use the workbook for study with a learning group are provided in the next section of this chapter.

For Independent Study: This workbook can also be used effectively for self-study. You will get the most out of your self-study experience if you set a schedule for yourself before beginning, complete all the written exercises in the book, and perform the role plays of the scenarios you create. Applying what you learn to your own experience is the fastest and most effective way for you to guarantee that you have fully understood the material and have incorporated it into your own knowledge base.

With or Without the Video: The workbook is designed to be used on its own or together with the “Are you with me?” video. For tips on how to use the workbook with the video, see the section titled “Using the Video With the Workbook” that appears later in this 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

Using/Practicing What You've Learned **25 minutes**

- Participants pair up to role-play their scenarios while the facilitator moves between groups, observing
- The group comes back together to discuss what they learned/noticed while doing the role plays
- The facilitator adds what he/she observed during the role plays
- The group brainstorms key learnings from this exercise

Wrap-up **5 minutes**

- Review action items from this session
- The facilitator confirms the next meeting time and location, the work to be completed before that meeting, and any other assignments or responsibilities related to that session

Choosing Participants: The acceptable number of participants in a learning group ranges from about four to nine, with seven or eight as the ideal number. These participants need to have adequate literacy skills to read the “Are you with me?” workbook. In some situations, the facilitator may wish to include people from different departments in the same learning group so that participants can benefit from a variety of perspectives.

Planning a Learning Sequence: The facilitator must decide how many sessions to include in the learning sequence, and what material to cover during each session. See the recommendations in this chapter in the section called “Planning a Learning Sequence.” In some cases, the facilitator may decide to include additional topics in the learning sequence, developing his or her own materials for these topics. We strongly recommend that any new topics follow the same learning sequence as the existing topics in this workbook: overview, unsuccessful call, think about it, successful call, think about it, how to ..., using what you've learned, practicing what you've learned, reviewing what you've learned. Content for three possible additional topics has been included in the appendix.

Coordinating Scheduling: A study schedule should be created that fits into the work schedules of learning group participants. Then, participants should be told the goals and schedule of the learning group, the length of each session, and what will be expected of them. They should be informed of the start date of the learning group, and asked to confirm their attendance on that date. Participants should be notified of any work they are expected to do before the first session, and asked to confirm that they will be able to complete these pre-instructional activities.

Facilitating Each Session: Effective facilitation is critical to the success of each learning session, and the learning group sequence overall. Here are some tips for facilitating smooth and effective learning sessions:

- Manage the physical environment so that it is clean, comfortable, appropriately lit and quiet.
- If possible, set chairs around a long or horseshoe-shaped table to promote easy and relaxed interaction among participants.

- 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.

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USING THE VIDEO WITH THE WORKBOOK

The “Are you with me?” video covers many but not all of the topics included in the workbook. These topics include the following and are presented in this order:

- Making a Call
- Taking a Call
- Putting a Caller on Hold
- Transferring a Call
- Leaving a Message on Voice Mail
- Taking a Message

If you would like to use the video to support your use of the workbook, either for group or self-study, we recommend you:

- Watch the video during your first learning session, before reading or discussing the workbook. If you're in a group setting, discuss participants' reactions to the video, including what they learned from it, and how they feel the information applies to them in their job. Also discuss what questions the video raises that might be answered by the workbook. If you're using the video for self-study, ask yourself the same questions and jot down your answers.
- When you come to each section in the workbook that has a corresponding section in the video, begin your learning session by reviewing the appropriate section in the video. If you're in a group setting, discuss the group's reaction to this video clip. If you're using the video for self-study, write down your own reactions to refer to later as you complete the exercises for this topic. Then go on to review and reflect on the unsuccessful call for that topic in the workbook.
- When you finish the last section in the workbook you may wish to go back and watch the entire video one last time. Use this viewing as a review of the most important information presented in the workbook. If you are using the video in a group setting, discuss any final observations you have about the video now that you have completed the course. If you are using the video for self-study, jot down your final observations and reactions as a way of summarizing what you have learned.

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

This exercise helps learners solidify their understanding by practicing what they've just learned in a role-play interaction.

Planning a Learning Sequence: Whether you are going through this workbook independently or as part of a group, it's important to plan out a learning sequence that will be most effective in helping you achieve your learning objectives. For each topic, you will learn the most if you complete the entire chapter for that topic at one time.

Your learning will also be most effective (and most fun!) if you allow for "soak" time between chapters, when your brain can absorb the information and integrate it into your existing knowledge base. This "soak" time can be anywhere from ten minutes to days or weeks, depending on how your program is set up. However, your learning will be most efficient if you allow no more than a few days to elapse between study sessions. An ideal learning sequence would include eight sessions, with the first session covering the "How to Use This Book" and "Introduction" chapters, and sessions 2-8 covering chapters 1-7 respectively.

If learning sessions need to be short, you may wish to divide a single study topic into more than one learning session. In this case, we recommend that you always do the "Think About It" section for a particular scenario immediately after reading the scenario, and that you do the "Using What You've Learned" and "Practicing What You've Learned" sections for each topic immediately after the "How to ..." section for that topic. With this approach, each chapter would be broken down into a maximum of three learning sessions as follows:

Learning Session 1	<i>Unsuccessful Call, Think About It</i>
Learning Session 2	<i>Successful Call, Think About It</i>
Learning Session 3	<i>How to ..., Using What You've Learned, Practicing What You've Learned</i>

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Introduction

OVERVIEW

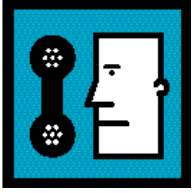
This chapter will give you a general approach to telephone communication that will serve as the foundation for making all your telephone experiences successful. This general approach is based on three observations:

1. We do not always treat other people on the phone as we would like to be treated because we are separated.
2. When you're speaking on the phone it helps if you really connect with the person on the other end of the line.
3. Good phone courtesy means treating the other person as if you were in the same room, in other words, be "with" the person to whom you're speaking.

Another factor in the success of your phone calls is how well you know your role in each call, and perform that role. Your role on the phone will change from call to call and depends on what your job is, what types of information you are tasked with providing or gathering, how your work ties in with the work of other people in your organization, and who the person is on the other end of the line.

In this chapter you will:

- Think about a past experience with an unsuccessful phone call and evaluate your communication with the person on the other end of the line.
- Think about a past experience with a successful phone call and evaluate your communication with the person on the other end of the line.
- Learn about an approach to telephone communication that will help all your calls be successful: being "with" the caller.
- Learn some general guidelines for evaluating and performing your role on the phone.



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?

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EXERCISE: A SUCCESSFUL BUSINESS CALL

When was the last time you had a successful phone call on the job? Imagine that circumstance.

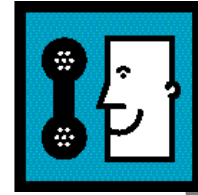
With whom were you speaking? What did you accomplish during the call?

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?

If you had a productive phone call you probably felt connected to the person you were speaking with. And if you felt connected, you probably felt as if you were “with” that person. Communicating over the phone is not very different from communicating in person: In both situations, communication becomes positive and effective when you feel connected to the person with whom you’re interacting.

Most people know the appropriate way to act when they’re with someone in person, even a stranger. But somehow people often forget these skills when they’re talking on the phone. Without the visual cues of facial expression, body language and gesture, they lose a lot of information about who the other person is and what they’re saying. Then it becomes easy to treat that person as though they were merely a voice instead of a real person.



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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.

Example #1: You are a receptionist and someone calls asking for general information and marketing literature about your company. In your organization, it is not within the scope of your job to fulfill this type of request. Furthermore, if you take the time to get detailed information from the caller, you will be neglecting other incoming calls which it is your job to answer. The appropriate response for you is to refer the caller to the person within your company whose job it is to handle this type of request.

Example #2: You take a message for a co-worker who is out of the office. It is not your job to apologize that the person is not in, nor to promise that they will call back. Your job is simply to record all the necessary information in the message, reassure the caller that the message will get delivered, and then make sure the person receives it.

REVIEWING WHAT YOU'VE LEARNED: INTRODUCTION

As you've discovered, there are a few simple guidelines you can follow to help make all your calls successful:

- Try to connect with the person on the other end of the line.
- Be "with" this person. Treat them as you would if you were in the same room with them.
- Know your role in the call, including what information you are and are not tasked with providing or gathering. Speak in a way that is appropriate to your relationship with the other person on the phone.

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Chapter 1: Making a Call

OVERVIEW

This chapter will give you a method for making calls successfully every time. It will teach you how to:

- Prepare yourself for a call, so that the information you need is readily at hand.
- Decide to be friendly, so that the person on the other end of the line will be inclined to welcome your communication.
- Introduce yourself, so the person you're calling knows who is calling.
- Explain why you're calling, so that you can more easily and efficiently accomplish your goal during the call.
- Make sure it's a convenient time for the other person to speak with you, so that the other person feels their time is being respected, and so that the phone conversation will take place at a moment when it can be most productive.
- Summarize the call and thank the person you're calling, so that the call ends on a positive note, with clear identification of results and follow-up needed.

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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.

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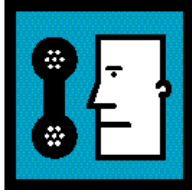
YOUR FRAME OF MIND

It helps to think about making a call the same way you would think about 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.

Let's begin by looking at a situation where the connection between two people on the phone suffers when these rules of common courtesy aren't followed.

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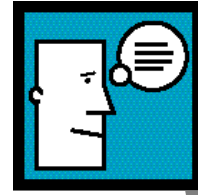
MEDIA PRODUCTION COMPANY: UNSUCCESSFUL CALL

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.

THINK ABOUT IT

In this version of the scenario, Suzie May was not very successful in moving closer to her goal of getting a job.



Describe how you would feel if you were the receptionist or Joe receiving Suzie's call in this scenario.

What were some of the things Suzie did during this call that you would not have appreciated if you were the receptionist or Joe?

FOR PREVIEW ONLY



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.

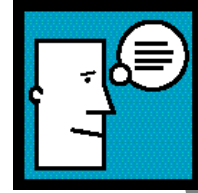
THINK ABOUT IT

In the successful version of this call, Suzie May accomplished a number of things, including:

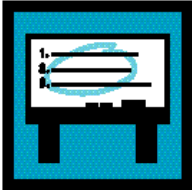
- Establishing a good rapport with the receptionist
- Getting connected with the person she wanted to speak with
- Making a good impression on the person she was calling
- Getting permission to call back and setting a timeframe for this call

Suzie's ultimate goal in contacting Joe Garofolo is clearly to be hired as a production assistant. It's unlikely she'll accomplish this in a single phone call. However, she has succeeded in taking a first step towards the realization of this goal by handling her first phone contact with her potential employer successfully.

What were some of the things Suzie did during this call that you would have appreciated if you were the receptionist or Joe?



FOR PREVIEW ONLY



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.

Make Sure It's a Convenient Time — Once again, this is common courtesy, and it's also practical. If the person you're calling is pressed for time, or right in the middle of something, your call will be an unwelcome interruption. In most cases, you're unlikely to accomplish your goal if the person receiving your call is distracted or pressured, and it's better for you to call back at a different time.

Summarize the Call and Thank the Person You're Calling — 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 you've just accomplished and remind both parties of what's supposed to happen next. Then, thank the person you've called. Again, this is the courteous thing to do, since the person has interrupted whatever they were doing to attend to your call and take time to speak with you.

In the successful version of the call, notice how Suzie May followed each of these steps. She:

Prepared herself for the call by knowing who she was calling and why she was calling them. She was even prepared in terms of remembering the receptionist's name.

Was friendly to Sandy, the receptionist, when she answered the call, and then later to Joe Garofolo when she was transferred to him.

Introduced herself first to Sandy and then to Joe, reminding them in a gracious way of who she was.

Explained why she was calling first to Sandy (she was calling to speak with Joe) and then to Joe (she was calling to follow up on her resume.) Notice that her explanation of why she was calling was appropriate to the person she was speaking with.

Asked whether it was a convenient time to speak with Joe and when she discovered it was not, scheduled a callback for later that day.

Summarized the call with Joe by agreeing to call back after 1:30 that afternoon, and then thanked him for speaking with her.



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!

4. Introduce yourself.

Does the person you're calling know you? How will you introduce yourself when they answer the phone?

5. Explain why you're calling.

How will you explain the reason for your call?

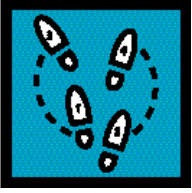
6. Make sure it's a convenient time.

Is the person you're calling likely to be in the middle of something important when you call?

7. Summarize the call and thank the person you're calling.

If you are successful in accomplishing your goal in this phone conversation, how will you summarize the call when it is over?

Don't forget to thank the person you're calling for their time!



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.



Chapter 2: Taking a Call

OVERVIEW

This chapter will give you a method for taking calls successfully every time. It will teach you how to:

- Decide to be friendly, so that you'll have a smooth, positive flow of communication with people who call you.
- Answer the phone as quickly as possible, so that you don't keep callers waiting.
- Greet callers and make them feel welcomed, so they'll feel comfortable that they called.
- Help callers explain the reasons for their calls, so that you can more easily assist them.
- Offer solutions to callers' problems, or responses to their requests.
- Summarize calls and thank callers for calling, so that you end conversations on a positive note and with clear identification of results and follow-up needed.

FOR PREVIEW ONLY

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.

FOR PREVIEW ONLY

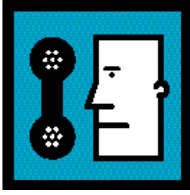
YOUR FRAME OF MIND

It helps to think about taking a call the same way you would think about 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.

Let's begin by looking at a situation where the connection between two people on the phone suffers when these rules of common courtesy aren't followed.

FOR PREVIEW ONLY



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.

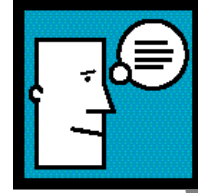
Bob (*Sounding angry now*) Hey, our daughter just had a baby and ...

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 ...

THINK ABOUT IT

In the unsuccessful version of this conversation, Barbara did not do a very good job of taking a call.



Describe how you would feel if you were the patient's husband in this situation.

What were some of the things Barbara did during this call that you would not have appreciated if you were the patient's husband?

FOR PREVIEW ONLY



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 go 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.

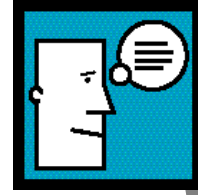
THINK ABOUT IT

In the successful version of this call, Barbara accomplished a number of things, including:

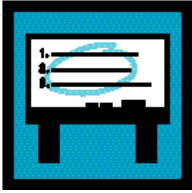
- Being receptive and sympathetic, even though she was under pressure
- Acknowledging that she made the caller wait before she picked up the phone
- Finding out the circumstances behind the caller's request so that she could make a judgment about the urgency of the need, and whether it called for special action
- Explaining her own circumstance, and why she couldn't respond to the caller's need herself immediately
- Finding alternative solutions to the problem at hand

In this situation Barbara needs to respond to Bob McDonnell's call without neglecting other pressing responsibilities. She does this by finding an alternative solution to Bob's problem.

What were some of the things Barbara did during this call that you would have appreciated if you were Bob McDonnell?



FOR PREVIEW ONLY



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

the person who called you.

In the successful version of the call, notice how Barbara followed each of these steps. She:

Decided to be friendly, answering the phone in a receptive and open way, even though she was in a rush.

Answered the phone as quickly as she could, and apologized to the caller for not getting to the phone sooner.

Greeted the caller, giving her name and the name of the hospital ward, and indicating that the caller had reached the nurses' station.

Helped the caller explain the reason for his call, politely yet efficiently finding out why the caller was calling, and what he had already done to try to resolve his problem.

Offered an alternate solution to the caller's problem, since she was not able to help the caller immediately herself. Instead, Barbara promised to find someone else who could help Bob McDonnell, and told him how and when he could touch base with that person.

Summarized the call, restating when Bob should call back and whom he would be speaking with, and **thanked him for calling**.

FOR PREVIEW ONLY



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 be receiving a phone call. Any call will do — it doesn't have to be anything particularly important or complicated.

What is the situation? From whom will you be receiving a call? What is your relationship to this person?

2. Decide to be friendly.

How do you feel about taking this call?

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

3. Answer the phone as quickly as possible.

Can you answer the phone within three rings? If not, how can you eliminate obstacles to answering the phone?

FOR PREVIEW ONLY

4. Help the caller explain the reason for the call.

What do you think the reason for this call will be? What can you ask the caller to help them clarify the reason for their call?

5. Offer solutions.

In this situation, how can you help the caller achieve his or her purpose in calling you?

6. Summarize the call.

If the caller is successful in accomplishing their goal, how will you summarize the conversation when it is over?

Don't forget to thank the person who called you!

FOR PREVIEW ONLY



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 scene 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 scene 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 scene — 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 take this call in real life.

REVIEWING WHAT YOU'VE LEARNED: CHAPTER 2 – TAKING A CALL

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

Be friendly to the person who is calling you when you answer the phone, and throughout the conversation.

Answer the phone as quickly as possible, and apologize and explain the reason for the delay if you are not able to get to the phone right away.

Greet callers, giving them your name and the company or department they have reached, if this greeting is appropriate.

Help them explain why they're calling by asking them questions and listening carefully to their answers.

Offer solutions to their problems or requests, referring them to someone who can help them if you can't help them yourself.

Summarize the call so both you and the caller understand what's been decided upon or agreed to, and **thank the caller for calling**.



Chapter 3: Redirecting a Call

OVERVIEW

This chapter will give you a method for redirecting calls successfully every time. It will teach you how to:

- Ask permission first before putting a caller on hold.
- Give the caller an idea of what you will be doing for them while they wait, as well as how long they'll be on hold.
- Thank them for agreeing to hold.
- Thank them again when you come back on the line.
- Find out what the caller wants before transferring the call.
- Ask permission of the caller before transferring the call.
- Find out if it's a convenient time for the person you're transferring the call to before transferring the call.
- Ask permission before transferring the caller to voice mail if the person the caller is trying to reach is not available.

FOR PREVIEW ONLY

IN THIS CHAPTER YOU WILL:

- Read an example of how a call was redirected 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 redirect all your calls successfully.
- Use what you've learned in a situation in your own life.
- Practice what you've learned.

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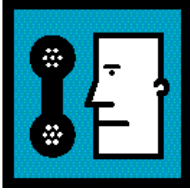
YOUR FRAME OF MIND

It helps to think of redirecting a call like redirecting a visitor who must wait while you finish other work, or who needs to speak with someone other than yourself.

If someone came to visit you where you work, it would be impolite to make that person wait without asking, and it would be impolite in any case to make him or her wait a long time. Similarly, you wouldn't just send a visitor to a co-worker's office without first asking them if that's where they wanted to go. Nor would you send them without first telling your colleague who the visitor was, and finding out if it was a convenient time for them to help the visitor.

Let's begin by looking at a situation where the connection between two people on the phone suffers when these rules of common courtesy aren't followed.

FOR PREVIEW ONLY



HOTEL RECEPTION: UNSUCCESSFUL CALL

Samuel works at the front desk of a large hotel that caters to business travelers. It is late in the afternoon, and the front desk is very busy. At this moment, there aren't enough people at the front desk to handle all the guests needing service without making some of them wait. The telephone rings.

Samuel Good afternoon, front desk. Could you hold please?

Caller Actually, I ...

(Samuel puts the caller on hold before she has a chance to respond. A minute passes. Samuel comes back on the line.)

Samuel Hello, how may I help you?

Caller *(The caller sounds a bit frustrated.)* Can you tell me whether Mike Slater is registered as a guest in this hotel?

Samuel Yes, I'll transfer you.

Caller Well, actually ...

(Samuel transfers the caller to Mike Slater's room before she has a chance to respond. The caller hangs up the phone and calls back. Samuel answers the phone again.)

Samuel Good afternoon, Columbia Hotel. Could you ...

Caller *(Cutting Samuel off and speaking with annoyance)* No! I can't hold. And I don't want to be transferred. I simply want to know the correct address of the hotel to overnight a package to my co-worker who is staying there.

Samuel Oh, certainly. The address is 21 Marshall Drive, Chicago, Illinois, 60607.

Caller Thank you. Goodbye.

THINK ABOUT IT



In the unsuccessful version of this conversation, Samuel did not do a very good job of redirecting the call.

Describe how you would feel if you were the caller in this situation.

What were some of the things Samuel did during this call that you would not have appreciated if you were the caller?

FOR PREVIEW ONLY



HOTEL RECEPTION: SUCCESSFUL CALL

- Samuel** Good afternoon, front desk. Could you hold for just a minute please?
- Caller** OK, if it will just be a minute.
- Samuel** Thank you for holding. I'll be right back. *(Samuel puts the caller on hold while he completes a transaction with a customer. About 15 seconds later he is back.)* Hello, thank you for waiting. How may I help you?
- Caller** Can you tell me whether Mike Slater is registered as a guest in this hotel?
- Samuel** Sure. *(A moment passes.)* Yes he is. Would you like me to transfer you?
- Caller** No, thank you. I don't need to speak with him now. I wasn't sure of his exact itinerary because he's just changed it and I haven't heard from him yet. I need to send something to him by overnight to arrive first thing in the morning.
- Samuel** Do you need our street address?
- Caller** Yes, thank you.
- Samuel** The address is 21 Marshall Drive, Chicago, Illinois, 60607. May I help you with anything else?
- Caller** Yes, I'd like to find out about your banquet and event services. We're looking for an off-site location for our Midwestern regional meeting later this year.
- Samuel** The person you need to speak with is Terry Mizrahi. Can you hold for a moment while I see whether she's available?
- Caller** Yes.
- Samuel** Thank you. *(A moment passes. Terry Mizrahi picks up the phone in her office.)*
- Terry** Hi, this is Terry.
- Samuel** Terry, this is Samuel. I have a woman on the line who would like information about our banquet and event services. May I transfer her to you?
- Terry** Actually, I'm right in the middle of a meeting. You can put her into my voice mail if she'd like.
- Samuel** OK, thank you. *(A moment passes. Samuel picks up the line with the outside caller.)* Hi, thanks for waiting. Terry's not available at the moment. Would you like to leave a message on her voice mail?

Caller Umm, no, I think I'll wait. Can you give me her direct number?

Samuel Sure, it's 654-3899.

Caller Great, I'll call her tomorrow.

Samuel Have a nice evening.

Caller You too. Goodbye.

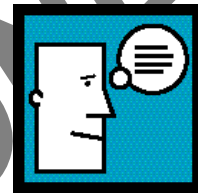
THINK ABOUT IT

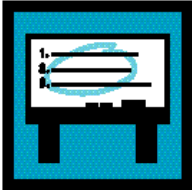
In the successful version of this call, Samuel accomplished a number of things, including:

- Getting time to finish the business he was in the middle of, while still being receptive and gracious to a customer calling from outside the hotel
- Meeting the caller's needs for several different types of information
- Putting the caller on hold politely and respectfully
- Being attentive to the customer's real needs, rather than assuming he knew what the customer wanted
- Transferring the call in a way that was considerate both of the caller and the person he was transferring the call to

In this situation Samuel needed to be able to move in and out of the call at several points, first to serve another customer, and then to locate the requested information. He did this carefully and politely by respecting the customer's time, asking permission, thanking the customer for waiting, and listening carefully to the customer's needs.

What were some of the things Samuel did during this call that you would have appreciated if you were the caller?





HOW TO REDIRECT CALLS SUCCESSFULLY

There are a few simple steps you can follow that will help you redirect calls in a way that will manage your workflow while respecting and being considerate of callers.

To get in the right frame of mind, think about how you feel when you are making a call and you are put on hold or transferred. What seems considerate and acceptable in this type of situation, and what bothers you?

Nobody likes to be put on hold — and nobody likes to put a caller on hold. But sometimes the situation makes it necessary: you have to ask a caller to wait while you look for information, find the person they're calling for, or help another customer. It's important to let the caller know you respect their time and value their communication, and demonstrate your willingness to be as responsive as you can be. When you're transferring a call, there are two people whose feelings you need to consider: the caller and the person you are transferring them to.

As you learned at the beginning of this chapter, it helps to think of redirecting a call like redirecting a visitor who must wait while you finish other work, or who needs to speak with someone other than yourself. If someone came to visit you where you work, it would be impolite to make that person wait without asking, and it would be impolite in any case to make him or her wait a long time. Similarly, you wouldn't just send a visitor to a co-worker's office without first asking them if that's where they wanted to go. Nor would you send them without first telling your colleague who the visitor was, and finding out if it was a convenient time for them to help the visitor.

So, how does this translate into redirecting a phone call? Here are some steps that will help you redirect a phone call successfully:

Ask Permission — Before putting a caller on hold, ask permission. The caller may be very pressed for time, or have some other reason why they don't want to be put on hold.

Tell the Caller What You'll Be Doing for Them, and How Long You'll Be — The caller will feel more comfortable if they know what you will be doing for them while they wait. In most cases, they will also be more comfortable waiting if you tell them how long you'll be gone. If you'll be helping other people while the caller is on hold you may not want to tell them what you'll be doing during this time; not every caller will appreciate knowing that you're serving other people while they wait.

In all cases, it's important to ask the caller's permission politely before putting them on hold.

Thank Them — When they give you permission, thank them before you actually put them on hold.

Thank Them Again When You Return — When you come back on the line, thank the caller again for having waited.

Find Out What the Caller Wants Before Transferring — If you can't help the caller yourself, offer to transfer them to someone who can. However, make sure you understand the caller's needs and that they would, in fact, like to be transferred before you do so.

Find Out If It's A Convenient Time For the Person You're Transferring the Call To — The person to whom you would like to transfer the call may be busy or otherwise unavailable. Make sure it's a convenient time for them to receive the call before you transfer the caller.

Ask Permission Before Transferring the Caller to Voice Mail — If the person the caller is trying to reach is not available, make sure the caller would like to leave a message in voice mail before transferring them there. Not everybody feels comfortable leaving a message on voice mail — and sometimes callers have other reasons for preferring not to leave a voice mail message.

In the successful version of this call, notice how Samuel followed each of these steps. He:

Asked permission of the caller before putting her on hold, both at the beginning of the call, and later in the call when he checked with the banquet and events person to see if he could transfer the call to her

Indicated how long he would be when he first put her on hold, and later **told her what he would be doing for her while she waited** — when he put her on hold to speak with the banquet and events person

Thanked the caller for agreeing to wait, when he first put the caller on hold, and later while he spoke with the banquet and events person

Thanked the caller again when he got back on the phone each time after putting her on hold

Made sure to understand the caller's needs before transferring her to speak with another person, first when she asked about a guest in the hotel, and later when she wanted to get information about banquets and events

Found out if it was a convenient time for the banquet and events person to speak with the caller before transferring her

Asked permission before transferring the caller to the banquet and events person's voice mail



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 put a caller on hold and then transfer the call. Any call will do — it doesn't have to be anything particularly important or complicated.

What is the situation? From whom will you be receiving a call? What is your relationship to this person?

2. **Ask permission to put the caller on hold.**

Why would you need to put the caller on hold? What would you say to ask permission to put the caller on hold?

3. **Tell the caller what you will be doing and indicate how long you will be.**

What would you say to the caller to explain what you will be doing while they're on hold and how long you will be?

FOR PREVIEW ONLY

4. Thank the caller before you put them on hold, and again when you get back on the phone.

*What would you say to the caller to thank them when you put them on hold?
What would you say when you picked up the line again?*

5. Make sure you understand the caller's needs.

What would you ask the caller to find out exactly how you can help them, and whether they would like to be transferred?

6. Find out if it is a convenient time.

Who might you be transferring the caller to? What would you say to this person to find out if they are available to receive the call?

7. Ask permission before transferring the caller to voice mail.

If the person the caller wants to speak with is not available, what would you say to the caller to find out whether they would like to leave a message in voice mail?



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 scene you've just created and do a quick role-play, with you playing the person putting the caller on hold and transferring the call, and a friend or co-worker playing the caller.
- Make sure your role-play partner has read your scene 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 scene —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 transfer this call in real life.

REVIEWING WHAT YOU'VE LEARNED: CHAPTER 3 – REDIRECTING A CALL

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

Ask permission before putting a caller on hold.

Tell the caller what you will be doing for him or her during the hold period and **indicate how long you will be**.

Thank the caller for agreeing to wait before you put them on hold.

Thank the caller again when you pick up the call after putting the caller on hold.

Make sure you understand the caller's needs before transferring them to speak with another person.

Find out if it's a convenient time for the person who will be receiving the call to speak with the caller before transferring the call.

Ask permission before transferring the caller to voice mail if the person the caller is trying to reach is not available.



Chapter 4: Voice Mail Messages

OVERVIEW

This chapter will give you a method for using voice mail so that it will work best for you. It will teach you how to record an effective outgoing message by:

- Eliminating background noise and speaking firmly and clearly to make sure the caller can hear you well
- Greeting callers in a friendly manner and letting them know they've reached voice mail
- Including your name and other critical information about you and your job
- Letting callers know when they can expect to hear back from you
- Telling callers what information you need from them
- Making your greeting brief
- Being friendly
- Including instructions for how the caller can reach a live person

It will also teach you how to leave effective messages on someone else's voice mail by:

- Planning ahead to figure out exactly what you want to say
- Greeting the caller, to create a friendly feeling during the call
- Introducing yourself and leaving your phone number or extension, so the person receiving the message will know who called
- If appropriate, leaving the date and time of your call
- Explaining the reason for your call, and being clear and to the point
- Providing the information requested, if any, in the outgoing message of the person you are calling
- Suggesting the next steps, such as what follow-up you would like from the person you called and when you need a response

IN THIS CHAPTER YOU WILL:

- Read an example of how voice mail was used ineffectively, both to record an outgoing message, and to leave a message in another person's voice mail box.
- Write down your feelings about why the call was unsuccessful.
- Read a second example of the call, this time with successful results.
- Write down your feelings about why the second call was successful.
- Learn some simple steps that will help you make sure your use of voice mail is always successful.
- Use what you've learned in a situation in your own life.
- Practice what you've learned.

FOR PREVIEW ONLY

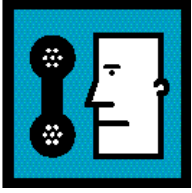
YOUR FRAME OF MIND

It helps to think about recording an outgoing voice mail message the same way you would think about leaving a note for someone you know will be dropping by when you're out. Your message would explain when you will be available, and then ask for information that will help you decide when and how you can best reconnect.

It helps to think about recording a message on voice mail the same way you would think about leaving a note when the person you stop by to see is out or unavailable. Your note would explain who came by, and how the person you tried to visit can get back in touch with you. It would also communicate your reason for visiting in a manner that is friendly, professional, and to the point.

Let's begin by looking at a situation where the connection between two people on the phone suffers when these rules of common courtesy aren't followed.

FOR PREVIEW ONLY



OFFICE ENVIRONMENT: UNSUCCESSFUL CALL

Max is a computer network support person for a small manufacturing company. His job is to keep the company's system maintained, upgraded, and running smoothly, help employees with their special computer needs, and troubleshoot any problems they have with their PCs. He receives many voice mail messages a day from employees requesting help with their computer systems.

In this scene, an employee named Nathan calls, listens to Max's outgoing voice mail message, tries to page Max, and then leaves a message for him in his voice mail box.

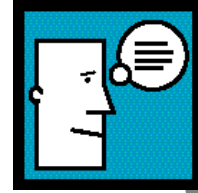
(Nathan dials Max's extension. It rings three times, then rolls over into voice mail. When Max's voice mail message comes on there is a noisy printer printing in the background and Max's voice is soft and distracted-sounding.)

Max Hi. Leave me a message and I'll get back to you.

(The beep sounds and Nathan leaves the following message.)

Nathan Hi, I hope this is Max's voice mail. I'm having some kind of problem with my PC — I don't know why — this is really a drag — I'm trying to write a proposal and this definitely is not helping. I've had problems with this PC ever since I got it six months ago and it's really slowing down my work. Can you help me? Oh, this is Nathan in Sales. Goodbye.

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THINK ABOUT IT

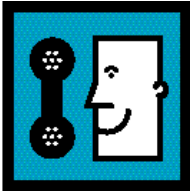
In the unsuccessful version of this call, Max did not do a very good job of recording an outgoing message, nor did Nathan do a very good job of leaving a message in Max's voice mail box.

If you were Nathan reaching Max's voice mail, what might your thoughts or feelings be about his outgoing message?

What were some of the things Max did or did not do in recording his outgoing message that made it less effective?

If you were Max receiving Nathan's call, what might your thoughts or feelings be about his voice mail message?

What were some of the things Nathan did or did not do in recording his message for Max that made it less effective?



OFFICE ENVIRONMENT: SUCCESSFUL CALL

(When Nathan is transferred into Max's voice mail he listens to the following message. Max's voice is clear and focused, and there is minimal background noise.)

Max Hi, you've reached the voice mail box of Max Redmond at extension 238, Computer Support Services. Today is Friday, August 7 and I'll be in the office all day, checking my messages every hour. Please leave me your name, extension number, and the reason for your call, and I'll get back to you as soon as I can. If you're having a problem that requires immediate attention, press # and then dial 210 to reach Jeanette Murphy and she will page me or try to find someone else who can help you. Thank you.

(Nathan presses # and then dials 210.)

Jeanette Good morning, this is Jeanette.

Nathan Hi Jeanette, this is Nathan in Sales. I'm having a problem with my PC that needs to be fixed right away. Is Max in?

Jeanette He was just here a few minutes ago. May I put you on hold for a moment while I page him?

Nathan Yes.

Jeanette OK, thank you. *(A minute passes and then Jeanette comes back on the line.)* Hi Nathan, thanks for holding. Max isn't picking up. He must have stepped out of the office for a minute. John and Susan are both out today for a conference, so unfortunately they can't help you either. Would you like to leave a message in Max's voice mail? He usually checks it when he's been out of the office for a few minutes.

Nathan Yes, thank you.

Jeanette OK, I'll transfer you.

(Nathan listens to Max's outgoing voice mail message once more and then leaves the following message.)

Nathan Hi Max, this is Nathan in Sales at extension 426. I'm having a problem with my PC that I need help with as soon as possible. I have a proposal that needs to go out this morning and the only copy is on my hard drive. My computer keeps crashing for no apparent reason as soon as I open the file. The screen freezes, and I have to reboot to get the computer working again. I'm only using our standard software, and I don't have any other programs running, so I don't understand what the problem is.

It's 10:00. Please get back to me as soon as you can. I'll be at my desk. Thank you.

THINK ABOUT IT

In the successful version of this call, Max accomplished a number of things with his outgoing voice mail message, including:

- Presenting a professional, friendly greeting to callers who reach his voice mail
- Confirming who callers have reached
- Communicating his availability, the information callers should leave for him, and an alternative method for reaching him or someone else who can help them

Nathan also accomplished a number of things in this version of the call, including:

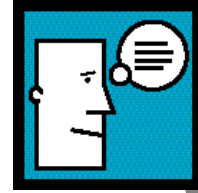
- Telling Max who was calling, and how he could be reached
- Clearly and simply stating his problem
- Communicating the urgency of his concern, in a polite way

If you were Nathan reaching Max's voice mail, what might your thoughts or feelings be about his outgoing message?

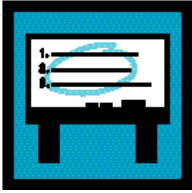
What were some of the things Max did in recording his outgoing message that made it effective?

If you were Max receiving Nathan's call, what might your thoughts or feelings be about his voice mail message?

What were some of the things Nathan did in recording his message that made it effective?



FOR PREVIEW ONLY



HOW TO USE VOICE MAIL EFFECTIVELY

There are a few simple steps you can follow that will help you use voice mail in a way that will work best for you.

To get in the right frame of mind, think about how you feel when you are interacting with a voice mail system. What makes you feel good about someone's outgoing message when you reach their voice mail? And, when someone leaves you a message, what do you appreciate?

As you learned at the beginning of this chapter, recording an outgoing voice mail message should be like leaving a note for someone you know will be dropping by when you're out. Your message should explain when you will be available, and then ask for information that will help you decide when and how you can best reconnect.

Recording a message on voice mail should be like leaving a note when the person you stop by to see is out or unavailable. Your note would tell who came by, and how the person you tried to visit can get back in touch with you. It would also communicate your reason for visiting in a manner that is friendly, professional and to the point.

So, how do these ideas translate into recording effective outgoing voice mail messages and leaving effective messages on someone else's voice mail?

Here are some steps that will help you record successful outgoing voice mail messages.

Eliminate Background Noise and Speak Clearly — Make sure background noise is minimal so the caller can hear you easily. Then, focus on what you're saying and speak in a clear, friendly voice.

Greet Callers and Let Them Know They've Reached Voice Mail — It is courteous to your callers to greet them in a friendly manner and let them know they've reached your voice mail. Otherwise, they may be confused for a moment and think that someone is actually on the other end of the line. Has this ever happened to you? It's an awkward feeling!

Include Your Name and Other Critical Information — Tell callers whom they've reached and the extension. In many situations, it's useful to callers if you also identify your department and/or your position there. It may also be useful to tell them what day it is, and what your availability will be throughout that day.

Let Callers Know When They'll Hear Back — Give callers a general sense of when you'll get back in touch with them.

Tell Callers What Information You Need — Help callers leave you messages that will be most useful to you by telling them exactly what information you need.

Make Your Greeting Brief — Keep your outgoing message as brief as possible while communicating everything callers need to know. People lead busy work lives, and can become impatient with long voice mail greetings.

Be Friendly — Your greeting sets the tone for your communication with the caller. Being friendly, yet professional promotes relaxed but productive phone interactions.

Include Instructions for Reaching a Live Person — Voice mail can be a wonderful extension of in-

person or direct communication, but it can also be frustrating if the caller needs to speak with someone immediately. Be sure to include instructions for how the caller can connect to a real person if leaving a message on voice mail will not serve their purpose.

In the successful version of the call, notice how Max followed each of these steps in recording his outgoing voice mail message. He:

Recorded his message with little background noise and spoke clearly so that callers could easily understand him.

Greeted callers and let them know they'd reached his voice mail.

Included his name, extension number and department. He also let callers know what day it was, and his availability throughout the day.

Let callers know when they'd hear back, assuring them he'd be checking his messages every hour, and would get back to them as soon as possible.

Told callers what information he needed them to leave for him. In Max's case, this was very important. Since his job is to solve other people's computer problems, it's useful to have as much information as possible about what types of problems he's dealing with.

Made his greeting brief, including only critical information.

Was friendly, yet professional.

Included instructions for reaching a live person, if the caller wanted to page him or speak with someone else who could help them.

FOR PREVIEW ONLY

Here are some steps that will help you leave effective messages on someone else's voice mail:

Plan Ahead — Know exactly what you want to say when you record your message. When you're trying to reach someone on the phone, it's always possible they won't be available, and you will need to leave a message. It's a good idea to plan in advance the message you'd like to leave so that you will be ready to deliver it when the occasion arises.

Greet the Caller — Begin your message by saying "hello," "good afternoon," or something else which is appropriate. This greeting helps create a friendly atmosphere of communication.

Introduce Yourself — Give your name, the number where the person you're calling can reach you, and if appropriate, the name of your department, company or affiliation.

Give the Date and Time — In some cases, it may be useful to leave the date and time of your call. This is not necessary if the phone system automatically gives the date and time of the message when it is retrieved.

Explain the Reason for Your Call — Tell the person you're calling why you've contacted them and what information or help you are seeking. This explanation should be clear and to the point.

Suggest the Next Step — Explain what response you would like from this phone call and how the person you're calling can best reach you. If you need a response by a certain time or date, communicate this as well.

In the second version of the call above, notice how Nathan followed each of these steps in recording a voice mail message for Max. He:

Seemed to have planned ahead before leaving his message, because the message was well organized and concise.

Greeted Max at the beginning of his message.

Introduced himself, giving his name, department and extension.

Gave the time of his call.

Explained the reason for his call, describing the type of problem he was having with his PC and asking for help in fixing it.

Provided the information Max requested in his outgoing voice mail message.

Suggested the next step, explaining that the problem was somewhat urgent and why. Nathan also asked Max to call him back as soon as possible.

FOR PREVIEW ONLY



USING WHAT YOU'VE LEARNED

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

1. **Write a script** for an outgoing voice mail message for yourself.

When during the day can you record this message so that background noise will be minimal?

What will you say to callers to greet them and let them know they've reached your voice mail?

How will you introduce yourself and communicate any other critical information about your phone number, position or department?

What will you say to callers about your availability and when they can expect to hear back from you? What, if anything, will you say about the date?

FOR PREVIEW ONLY

What information will you ask callers to leave in their voice mail messages for you?

What will you say to callers to let them know how they can reach a live person?

Now, write out your entire outgoing voice mail message below.

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

What is the situation? For whom will you be leaving a voice mail message? What is your relationship to this person?

FOR PREVIEW ONLY

3. Greet the person you're calling.

How will you greet the person you're calling at the beginning of your message?

4. Introduce yourself.

How will you introduce yourself and what will you say about your phone number and department, company or affiliation?

5. Explain the reason for your call.

What will you say about the reason you are calling?

FOR PREVIEW ONLY

6. Provide the information requested.

What information do you think the person you're calling will request in his or her outgoing voice mail message? What will you say to provide this information?

7. Suggest the next step.

What will you say to ask for the follow-up you would like from this phone call, tell the person you're calling how best they can reach you, and explain when you need their response?

FOR PREVIEW ONLY



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 outgoing voice mail message you've just written and practice delivering it out loud. Then, if you have voice mail, go ahead and record this new outgoing message.
- Next, practice out loud delivering the message you've written to leave on someone else's voice mail. Then, if you have voice mail, practice the message by calling yourself and leaving it in your own voice mail box.

FOR PREVIEW ONLY

REVIEWING WHAT YOU'VE LEARNED: CHAPTER 4 – VOICE MAIL MESSAGES

As you've discovered, the steps for using voice mail successfully are very simple.

To record an effective outgoing message all you need to do is:

Eliminate background noise and speak clearly to make it easy for the caller to understand you.

Greet callers and let them know they've reached voice mail.

Include your name and other critical information, such as your department and position, what day it is, and what your availability will be throughout the day.

Let callers know when they'll hear back from you.

Tell callers what information you need them to provide when they leave a voice mail message for you.

Make your greeting brief while communicating everything that is important.

Be friendly, setting the tone for your phone interactions with everyone who leaves messages on your voice mail.

Include instructions for reaching a live person so callers have an alternative if they prefer to speak with someone immediately.

FOR PREVIEW ONLY

To leave an effective message in someone else's voice mail box all you need to do is:

Plan ahead so that you will know exactly what you want to say when you record your message.

Greet the caller at the beginning of your message to create a friendly atmosphere for positive communication.

Introduce yourself, giving your name and any other appropriate information.

Give the date and time, if this information is appropriate or useful.

Explain the reason for your call, telling the person you're calling why you've contacted them and what you need or would like.

Suggest the next step, explaining what response you would like from this phone call and how the person you're calling can best reach you.

FOR PREVIEW ONLY



Chapter 5: Taking a Message

OVERVIEW

This chapter will give you a method for taking messages successfully every time. It will teach you how to:

- Offer to help the caller before simply taking a message.
- Present options for how you can help them.
- Take a complete message, including all important details.
- Read back the message to confirm that you've recorded the information correctly.
- Get the caller's number.
- Reassure the caller that you will make sure the information gets to the right person.

FOR PREVIEW ONLY

IN THIS CHAPTER YOU WILL:

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

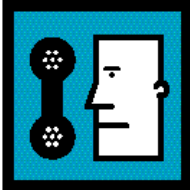
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YOUR FRAME OF MIND

It helps to think about taking a message the same way you would think about taking care of someone else's visitor. If the person the visitor came to see were not available, you would do your best to make them feel at home and help them in whatever way you could. You'd ask them what they need, see if you could help them or find someone else who could, and give them options for leaving a message for the person they came to visit in the first place. If they did want to leave a message, you'd assure them that you would personally see to it that their message would be delivered. It works the same way on the phone!

Let's begin by looking at a situation where the connection between two people on the phone suffers when these rules of common courtesy aren't followed.

FOR PREVIEW ONLY



GOVERNMENT OFFICE: UNSUCCESSFUL CALL

Stacy works in the Building Inspections office in her city's government. She processes requests for building inspections. A person calls the office asking to speak with a particular building inspector who is out on a call.

Stacy Good afternoon, Building Inspections, this is Stacy.

Paul Hi, this is Paul Shatz. May I speak with Jerry Rogers?

Stacy Mr. Rogers isn't in at the moment. May I take a message for him?

Paul Well, I'm the contractor for the new office building at 31st and Maple. Jerry was out here this morning. He wanted to review our drawings before telling me some changes we may need to make to how we're pulling in the electrical service. He told me to call him at this time in the afternoon. The electrician is on hold until I speak with him.

Stacy I'm sorry Mr. Shatz. He's out on a call. Shall I leave him a message to call you?

Paul Oh, OK, if that's all we can do right now.

Stacy What's your permit number?

Paul It's 762894C.

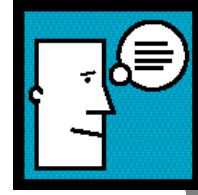
(Stacy writes down "Call Paul Shatz re: Permit Number 762894C" on a slip of paper and puts it in a mailbox marked "Jerry Rogers.")

Stacy All right, I've left him the message. Have a nice afternoon.

Paul Yeah, thanks. Goodbye.

THINK ABOUT IT

In the unsuccessful version of this call, Stacy did not do a very good job of taking a message.



Describe how you would feel if you were Paul Shatz in this situation.

What were some of the things Stacy did or did not do during this call that you would not have appreciated if you were Paul Shatz?

FOR PREVIEW ONLY



GOVERNMENT OFFICE: SUCCESSFUL CALL

Stacy Good afternoon, Building Inspections, this is Stacy.

Paul Hi, this is Paul Shatz. May I speak with Jerry Rogers?

Stacy Mr. Rogers isn't in at the moment. Perhaps there's someone else who can help you?

Paul Well, I don't think so, unless Jerry has told someone else the answer to this question. I'm the contractor for the new office building at 31st and Maple. Jerry was out here this morning. He wanted to review our drawings before telling me some changes we may need to make to how we're pulling in the electrical service. He told me to call him at this time in the afternoon. The electrician is on hold until I speak with him.

Stacy Hmm, I see. It sounds like no one else would understand the situation well enough to give you an answer. Jerry is out on a call, and it must have run longer than he expected it to. Would you like me to page him? He's got a beeper and I can just put in your number.

Paul Sure, that would be great. Let me give you my cell phone number. It's 828-3664.

Stacy OK, I'll page him with that number as soon as we get off the phone. Would you like me to leave him a message here anyway, just in case? Sometimes it's hard for him to stop what he's doing and answer his page, or he may be on his way back here.

Paul Yeah, that would be helpful.

Stacy OK, what's your permit number?

Paul It's 762894C.

Stacy What would you like me to say in the message?

Paul Please ask him if he had a chance to review our drawings to look at how we need to pull in our electrical service.

Stacy Would you like me to leave him your cell phone number, or is there another number where he should call you with this information?

Paul I'll be in our office in about five minutes, and I'll be there until 4:00, so why don't you have him call me there. He can always leave a message on my voice mail if he misses me for some reason. The number is 654-3232.

Stacy OK, let me read this back to you:

"With reference to permit number 762894C please call Paul Shatz about the electrical service feed. He'll be in his office at 654-3232 until 4:00, or you can leave a message on his voice mail at that number."

Paul Yeah, that sounds good.

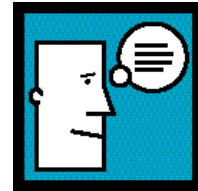
Stacy I'll page Jerry and then put this in his mailbox and make sure he gets it. I usually see him when he comes back into the office.

Paul OK, thanks a lot. You've been very helpful.

Stacy Goodbye, have a nice afternoon.

Paul Goodbye.

(Stacy hangs up, and picks up the phone again and pages Jerry. Then she writes the date and time on the message, signs it, and puts the message in his mailbox.)



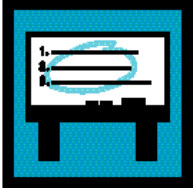
THINK ABOUT IT

In the successful version of this call, Stacy accomplished a number of things, including:

- Finding out what the caller really needed
- Providing options to address this situation
- Making the caller feel listened to and helped
- Taking an accurate and effective message
- Reassuring the caller that his message would be delivered

In this situation Stacy needed to help Paul Shatz reach Jerry Rogers, since it was important to contact him as soon as possible. She did this by providing options for how Paul could communicate with Jerry, and by taking a detailed message and promising it will be delivered.

What were some of the things Stacy did during this call that you would have appreciated if you were Paul Shatz?



HOW TO TAKE MESSAGES SUCCESSFULLY

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

To get in the right frame of mind, think about how you feel when you can't reach the person you are calling. What makes you feel good about the situation when someone takes your message? What bothers you?

As you learned at the beginning of this chapter, taking a message is like receiving someone else's visitor. When someone comes to visit and the person they've come to see is not available, it's courteous to make them feel at home and help them yourself if you can. You do this by listening to what they need, trying to help them yourself if you can, putting them in touch with someone else who can help them, and giving them options for how they can reach the person they came to see. You also take a message to pass along to the person they came to see, and reassure the visitor that the message will be delivered.

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

Offer to Help the Caller — Before simply taking a message, find out why the caller is calling. Listen very carefully to find out what they really need. Then, offer to help them solve their problem.

Present Options — Think of alternative solutions that will meet the caller's needs. Then, present these options to the caller and let them tell you what they would like to do.

Take a Complete Message — If the caller would like to leave a message, make sure the information you take down is complete, including all the details that will be important to the person receiving the message. Also include the date and time you took the message, and your name.

Read Back the Message — Read the message back to the caller to confirm that you've recorded the information correctly.

Get the Caller's Number — Ask for the caller's number and include it in the message. This is important to do even if the person who will receive this message already has the number. Having it readily available will make it quicker and easier to return the call.

Reassure the Caller — Tell the caller you will personally make sure the person they are calling receives their message.

In the successful version of the call, notice how Stacy followed each of these steps. She:

Offered to help the caller by suggesting that someone else might be able to help him address his problem

Presented options for how Paul might communicate with Jerry Rogers, including calling him on his pager and leaving him a message

Took a complete message, including all the relevant details about Paul's question and how and when Jerry could get in touch with him

Read the message back to Paul to confirm that she had taken all the information down correctly

Got Paul's number and included it in the message, so that Jerry would easily know how to reach Paul

Reassured Paul that she would personally make sure the message was delivered

FOR PREVIEW ONLY



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 be taking a phone message. Any call will do—it doesn't have to be anything particularly important or complicated.

What is the situation? From whom will you be taking the message? What is your relationship to this person?

2. **Offer to help the caller.**

What will you say to the caller to indicate your willingness and availability to help them solve their problem?

3. **Present options.**

What options might you present to the caller for how you can help them address their problem?

4. **Take a complete message.**

In this situation, what information would you need to include in the message in order for it to be complete?

FOR PREVIEW ONLY

5. Read back the message.

Remember to read the message back to the caller to make sure it's correct.

6. Get the caller's number.

What is the caller's number? Make sure to include it in the message.

7. Reassure the caller.

What will you say to the caller to reassure them that you will personally deliver their message?

8. Write the completed message.

Now, write out your completed message below.

FOR PREVIEW ONLY



PRACTICING WHAT YOU'VE LEARNED

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

- We suggest you practice the phone interaction you've just imagined and do a quick role-play, with you playing the person taking the message, and a friend or co-worker playing the person who is calling.
- Make sure your role-play partner has reviewed what you just wrote in the above exercise, so they know what their role is.
- You may also wish to discuss with your partner how you'd like them to play this scene — 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 take this call in real life.

REVIEWING WHAT YOU'VE LEARNED: CHAPTER 5 — TAKING A MESSAGE

As you've discovered, the steps for taking a message successfully are very simple. All you need to do is:

Offer to help the caller solve their problem or achieve the purpose of their call.

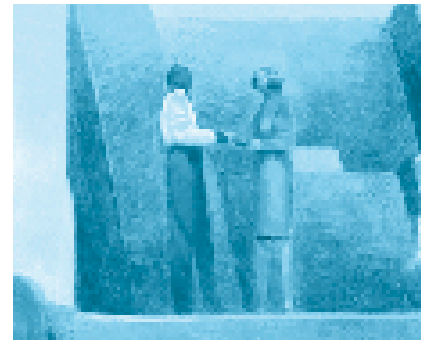
Present options for how you can help the caller solve their problem or communicate with the person they're trying to reach.

Take a complete message including all the details that are important to the person who will be receiving the message.

Read back the message to confirm that you've taken it down correctly.

Get the caller's number and include it in the message.

Reassure the caller that you will personally make sure the person they're calling will receive their message.



Chapter 6: Handling Dissatisfied Callers

OVERVIEW

This chapter will give you a method for handling dissatisfied callers successfully. It will teach you how to:

- Listen and let the caller tell you how they feel.
- Put yourself in the caller's position.
- Avoid making excuses.
- Find out the facts.
- Suggest options to solve the problem.
- Confirm what's been decided.
- End on a positive note, letting the caller know they're important to you and your organization.

FOR PREVIEW ONLY

IN THIS CHAPTER YOU WILL:

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

FOR PREVIEW ONLY

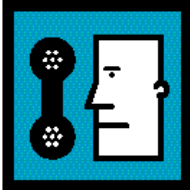
YOUR FRAME OF MIND

It helps to think about talking with a dissatisfied caller the same way you would think about having a conversation in person with someone who feels the same way.

If you take what the caller is saying personally, and allow your voice and body to become tense and defensive, they will pick up on this and react to your reaction. It's best to stay as calm and relaxed as you can, letting the person blow off steam before you try to say very much. It helps if you acknowledge how they're feeling, so they'll know you've been listening to them. Then you can address the specific content of their complaint to see if there's something you can do that will meet their needs in the situation. It always helps if you make an extra effort to end the interaction on a positive note, and let the person know that they're important to you.

Let's begin by looking at a situation where the connection between two people on the phone suffers when these rules of common courtesy aren't followed.

FOR PREVIEW ONLY



CALL CENTER: UNSUCCESSFUL CALL

Joe calls the telephone ordering center for Organigrow Farms, a gardening supply company specializing in organic gardening. He has purchased a supply of ladybugs to eat the aphids he believes have been troubling his roses.

Janine (*Janine answers the call with a pleasant-sounding voice.*) Good afternoon, Organigrow Farms, this is Janine. How may I help you today?

Mr. Lewis (*He sounds highly irritated and impatient.*) This is Joe Lewis. I bought a bunch of ladybugs from you two weeks ago. You promised me they would protect my roses from the aphids. Well, they don't work! My roses are dying! It may be too late to save them, and I think it's your fault!

Janine (*Sounding defensive*) Well, Mr. Lewis, ladybugs can be very effective with roses, but it depends on when and how you use them. Where and when did you release them in your garden?

Mr. Lewis (*Sounding quite angry now*) Now you're trying to tell me it's my fault. You have a lot of nerve. You know what I think? I think your company is doing false advertising! You promise people who are chemically sensitive that you have a safe alternative, and then you don't deliver!

Janine (*Sounding annoyed*) Mr. Lewis, I don't know who you spoke with when you ordered your ladybugs, but it was not me. Your tone of voice ...

Mr. Lewis Don't you speak to me, young lady, about my tone of voice! My mother planted these roses before you were born, and I can use whatever tone of voice I want if your company is killing them!

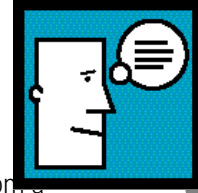
Janine (*Sounding angry herself*) Mr. Lewis, I can't speak with you if you continue to attack me this way. Perhaps you'd better call back once you've ...

Mr. Lewis (*Furious now*) I will do no such thing! I'm going to call my lawyer and take action against you and your company. How do you think your boss will feel about that, Janine?

(*He slams down the phone.*)

THINK ABOUT IT

In the unsuccessful version of this call, Janine did not do a very good job of handling a call from a dissatisfied customer.



Describe what observations you would have about Janine's performance if you were Janine's boss, watching the way she handled this situation.

What were some of the things Janine did or did not do during this call that made the call turn out the way it did?

FOR PREVIEW ONLY



CALL CENTER: SUCCESSFUL CALL

Janine (*Again, Janine answers the call with a pleasant-sounding voice.*) Good afternoon, Organigrow Farms, this is Janine. How may I help you today?

Mr. Lewis (*He sounds highly irritated and impatient.*) This is Joe Lewis. I bought a bunch of ladybugs from you two weeks ago. You promised me they would protect my roses from the aphids. Well, they don't work! My roses are dying! It may be too late to save them, and I think it's your fault!

Janine I'm sorry you're not happy with the ladybugs Mr. Lewis. What seems to be the problem?

Mr. Lewis You're darn right I'm not happy! I've been trying to find an alternative to chemical spraying because chemicals make me sick. But these ladybugs are not working, and my roses are dying! I think it's false advertising, what your company told me!

Janine Mr. Lewis, I'm sorry your roses aren't doing well. That sounds like an upsetting situation. How long have you been having a problem with your roses?

Mr. Lewis I inherited these roses about a month ago and they've looked sick the whole time! My mother planted them when I was a child, and she just passed away this spring. She left this house to me and she loved these roses, and now they're dying! I'm not a gardener — I don't know what to do with them.
...

Janine Well no wonder you're concerned about the roses. They'd be important to me too, if they were my mother's.

Mr. Lewis You're darn right! So what are you going to do about it?

Janine Well, do you mind if I ask you a couple of questions about the problem? Maybe we can figure out what's wrong with your roses.

Mr. Lewis (*Sounding doubtful and still annoyed*) Well.... I guess so. ... Shoot.

Janine What is the matter with your roses? I mean, how can you tell that they're dying?

Mr. Lewis Well, the stems are long and straggly with very few roses on them. And lots of the leaves are turning yellow and black. They look like they're dying fast! Ever since I was a kid these roses have always had tons of blooms on them in the summer. It's horrible to see them this way.

- Janine** Hmm, I'm so sorry — and you're right, they don't sound well. But you know the problem may not be aphids. How long has it been since someone tended the roses?
- Mr. Lewis** My mother always took care of them herself. Last summer they were beautiful — I remember her giving me a big bunch of them to bring home to my wife one Sunday. But late last summer she got sick and started going downhill fast. I guess she just stopped being able to take care of them.
- Janine** Oh, what a difficult situation. So, it sounds like they may not have been tended to for quite a while. You know roses are like children — they like a lot of attention. They need to be fertilized and pruned and watered carefully. I bet part of the problem is that they weren't cut back properly and then fertilized.
- Mr. Lewis** Well, I don't know how to do any of that stuff! Anyway, what about all those black leaves? Somebody told me aphids are the most common problem roses get, so I assumed the aphids were turning the leaves black.
- Janine** Well, aphids are a common problem — but they're not the only problem roses get. It certainly won't hurt that you released the ladybugs. But I bet the problem you're having is called black spot. It's a kind of fungus and it can be pretty dangerous for roses if it's not checked.
- Mr. Lewis** So, what should I do? I want to do something right away!
- Janine** Here's what I suggest: For starters how about if you go to your local library and get a book on rose gardening. There are many available that have pictures of common rose diseases, so you may be able to diagnose the problem yourself. If you can't find anything in your local library or bookstore, we sell a wonderful book on organic rose gardening. It has color photographs of common rose problems including black spot and alternative solutions on how to fix them. We also have a free handout on rose care with some great pruning tips. Would you like me to send that to you?
- Mr. Lewis** Yes, that sounds like a good idea. And I can go to the library today after work to look for a book.
- Janine** OK, let me see, your ordering address was 2256 Glendale Road, Portland, Oregon. Is that still correct? And is that where your roses are?
- Mr. Lewis** Yes, the city of roses — and mine are dying. Even if I get a book, how will I know for sure what the problem is? I don't want to take any chances!

Janine Well, I have another suggestion — let me just look this up. ... Yes, here it is, the Portland Nursery is a large nursery. We do business with them frequently. Why don't you pinch off a few of the bad-looking leaves from one of your rose bushes and bring them into the nursery. Ask to speak with someone in the rose section and show them the leaves. They can probably tell you just by looking at your sample what the problem is and what you need to do about it. You can also buy clippers there for pruning.

Mr. Lewis Well, that sounds like a good idea. I can stop by the nursery tomorrow morning on my way in to work and bring them a couple of leaves.

Janine Great. I bet they can help you. So, we'll send you our free handout on rose care. Then, once you've had a chance to look for a book on rose gardening and visit the nursery if you can, please call us back if we can be helpful in any other way. If it turns out you'd like to order our book on organic rose gardening, or if you need a chemical-free product for black spot, we'd be pleased to send them to you. My extension is 364 and I'd be happy to help you myself if you need anything. I know how it is, not wanting to use chemicals. I'm sensitive myself — that's how I started working here.

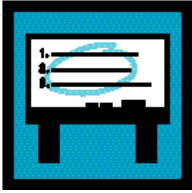
Mr. Lewis Thank you, you've been very helpful. Sorry I was a little grouchy. ...

Janine No problem. Your business is important to us. Now we just need to get your roses healthy again!

Mr. Lewis OK, thanks. Goodbye.

Janine Goodbye Mr. Lewis. Have a nice rest of your afternoon. And, good luck with your roses!

FOR PREVIEW ONLY



HOW TO HANDLE DISSATISFIED CALLERS SUCCESSFULLY

There are a few simple steps you can follow that will help you handle dissatisfied callers successfully.

To get in the right frame of mind, think about how you feel when you are dissatisfied with the person or organization you're calling. What type of response do you appreciate in this situation? What bothers you?

As you learned at the beginning of this chapter, talking to someone on the phone who is dissatisfied or upset is like having a conversation in person with someone who feels the same way. If you take what they're saying personally, and allow your voice and body to become tense and defensive, they will pick up on this and react to your reaction. It's best to stay as calm and relaxed as you can, letting the person blow off steam before you try to say very much. It helps if you acknowledge how they're feeling, so they'll know you've been listening to them. Then you can address the specific content of their complaint to see if there's something you can do that will meet their needs in the situation. It always helps if you make an extra effort to end the interaction on a positive note, and let the person know that they're important to you.

So, how does this translate into handling a dissatisfied caller? Here are some steps that will help you handle a dissatisfied caller successfully every time.

Listen to How the Caller Feels — When people are upset, they often can't concentrate on solving their problem until they've had a chance to vent their frustrations. Often you can help them feel better simply by listening.

Put Yourself in the Caller's Position — Try to understand the caller's perspective, and empathize with their situation. You can acknowledge how they feel without necessarily agreeing with them, or indicating that their position is right or wrong.

Avoid Making Excuses — Try not to take the situation personally, become defensive or start making excuses. This will only aggravate the caller and make them less confident in your ability to help.

Find Out the Facts — Wait until the caller has calmed down enough to discuss the problem. Then, get their permission for you to ask them a few questions that will help you understand the facts of the situation.

Suggest Options — Next, suggest options to solve the problem. When people are upset, it's often because they feel that someone has taken control away from them or taken advantage of them. Giving them options helps them feel empowered.

Confirm What's Been Decided — Confirm what has been decided in the phone conversation by restating what you and the caller will each do to follow up.

End on a Positive Note — Close in a friendly and positive way, restating your willingness to help. If possible, do or say something to tell the caller that they're important to you and your organization.

In the successful version of the call, notice how Janine followed each of these steps. She:

Listened to how Mr. Lewis felt without trying to stop him from venting his anger and

frustration

Put herself in Mr. Lewis' position, telling him she understood why he was upset about his mother's roses being sick

Avoided making excuses about why the ladybugs hadn't solved his problem, taking the situation personally, or defending herself or her company against Mr. Lewis' attacks

Found out the facts about what Mr. Lewis was observing with the roses that had convinced him they were ill, and that the ladybugs weren't solving the problem

Suggested options to address the problem, including reading a book on rose gardening and bringing a diseased rose leaf to his local nursery to get help diagnosing the disease

Confirmed what she had agreed to do before ending the phone conversation, namely sending him a free handout on rose gardening

Ended on a positive note by stating her willingness to help him in the future, telling him that his business was important to her company, and wishing him good luck in solving his rose problem

FOR PREVIEW ONLY



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 which you might need to speak with a dissatisfied caller.

What is the situation? Whom will you be speaking with? What is your relationship to this person?

2. Listen to how the caller feels.

What will you say to the caller to indicate your willingness to listen to their concerns?

FOR PREVIEW ONLY

3. Put yourself in the caller's position.

What will you say to the caller to let them know you understand how they feel? How can you best do this without agreeing or disagreeing with their position?

4. Avoid making excuses.

What do you need to avoid saying that would only make the situation worse?

5. Find out the facts.

How will you ask the caller's permission to gather some information from them? What will you ask them to find out the facts in the situation?

FOR PREVIEW ONLY



PRACTICING WHAT YOU'VE LEARNED

The best way to practice what you've learned is to practice it out loud. Handling a call from a dissatisfied caller can be a challenging situation, so it's particularly important to practice this skill.

- We suggest you practice the phone interaction you've just imagined and do a quick role-play, with you playing the person receiving the call, and a friend or co-worker playing the person who is calling.
- Make sure your role-play partner has reviewed what you just wrote in the above exercise, so they understand their role correctly.
- You may also wish to discuss with your partner how you'd like them to play this scene: How dissatisfied do you want them to be?

REVIEWING WHAT YOU'VE LEARNED: CHAPTER 6 — HANDLING DISSATISFIED CALLERS

As you've discovered, the steps for handling a dissatisfied caller are very simple. All you need to do is:

Listen to how the caller feels, allowing them to vent their frustration or displeasure.

Put yourself in the caller's position, acknowledging how they feel without agreeing or disagreeing with their position.

Avoid making excuses, becoming defensive, or taking what the caller is saying personally.

Find out the facts about what is happening in the situation.

Suggest options to solve the problem.

Confirm what's been decided by restating what you and the caller will each do to follow up.

End on a positive note, closing the conversation in a friendly and positive way, and letting the caller know that they are important to you and your organization.



Chapter 7: Managing Calls Effectively

OVERVIEW

This chapter will give you a method for managing calls effectively. It will teach you how to:

- Open the call in a friendly, yet professional manner.
- Direct the conversation to business.
- Ask open-ended questions to gain an understanding of the situation.
- Bring the conversation back to business if it wanders.
- Avoid drawing conclusions until you understand the situation.
- Agree on follow-up.
- Bring calls to a close by spelling out follow-up action.
- If necessary, end conversations by being direct.

FOR PREVIEW ONLY

IN THIS CHAPTER YOU WILL:

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

FOR PREVIEW ONLY

YOUR FRAME OF MIND

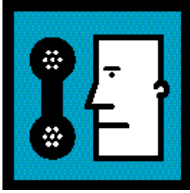
It helps to think about managing “wandering,” time-consuming calls the same way you think about keeping similar in-person conversations on track.

We all like to be friendly and share social conversation. To a certain extent, having a comfortable social interaction on the job can even make the work flow more smoothly and efficiently.

However, we also have limited time to get our work done and social conversations can take too much time away from the work we need to do. It’s important to be able to maneuver in our work-place conversations, steering them back to business when they start to take too much time away from the work we need to complete.

Let’s begin by looking at a situation where the connection between two people on the phone suffers when these rules of common courtesy aren’t followed.

FOR PREVIEW ONLY



HEALTHCARE CLINIC: UNSUCCESSFUL CALL

Maria is a receptionist at a small healthcare clinic, and schedules appointments for the doctors.

Maria Good morning, Sunrise Healthcare Clinic, may I help you?

Mrs.Mills Good morning, this is Donna Mills. I've never been to your clinic before, but someone I know has been there, and she said the doctor was great. I can't remember the doctor's name. Can you tell me the names of some of the woman doctors who work there?

Maria Well, there are three, Sanchez, Wong and Ames. Who is your friend? Perhaps I can look up who her doctor is.

Mrs.Mills Well, you know, I'm embarrassed to say I forget her name! We were waiting outside the school for our daughters, who are in the same class, and we struck up a conversation. She has short brown hair, medium build — brown eyes — kind of dark skin — very pleasant woman. I just can't remember her name. You know, when you move, you meet so many new people at once that it's hard to remember everyone's names. And then there are new street names and new names of towns. It's a little much for my brain to organize all at once. Have you ever moved clear across the country?

Maria Actually, yes — I moved here from California about seven years ago.

Mrs.Mills Really? That's quite a move! Why did you come to Massachusetts?

Maria Well, My husband got into medical school here.

Mrs.Mills Really? Where did he go to school?

Maria He went to Tufts University Medical School.

Mrs.Mills Well, I hear that's quite a good school! A cousin of mine went there years ago, so your husband wouldn't have known him. Now he lives in Texas, just outside of Houston. That's one place that is just too hot for me in the summer! I would never survive down there. When it gets that hot I get so irritable. Do you know what I mean?

Maria Yes, I don't like the heat either. So, how can we ...

Mrs.Mills You know, I'm really hoping I'll be comfortable here during the summer. I keep hearing about how humid it gets on the East Coast. Wyoming used to get pretty hot sometimes, but it was a dry heat. That's really different. How do you find the climate here?

Maria I've gotten quite used to it, actually. *(Another phone line is buzzing in the background.)*
Mrs. Mills, may I put you on hold for a moment?

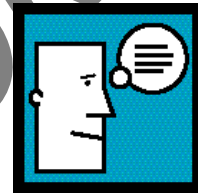
Mrs. Mills Sure, I guess so. You won't be long, will you?

Maria No, I'll be right back, thank you.

(She puts Mrs. Mills on hold to pick up the other line. As she does this she thinks to herself, "I've been on the phone with her two minutes and I don't even know what she wants yet. This call could take all day!")

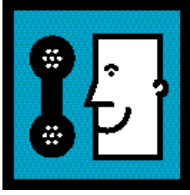
THINK ABOUT IT

In the unsuccessful version of this conversation, Maria did not do a very good job of managing the call from Donna Mills.



Describe what observations you would have about how Maria managed the call if you were Maria's boss, watching the way she handled this situation.

What were some of the things Maria did or did not do during this call that made the call flow the way it did?



HEALTHCARE CLINIC: SUCCESSFUL CALL

Maria Good morning, Sunrise Healthcare Clinic, may I help you?

Mrs.Mills Good morning, this is Donna Mills. I've never been to your clinic before, but someone I know has been there, and she said the doctor was great. I can't remember the doctor's name. Can you tell me the names of some of the woman doctors who work there?

Maria Well, there are three, Sanchez, Wong and Ames. How can we help you today Ms. Mills?

Mrs.Mills I'm new in town and one of the other mothers at my daughter's school recommended your clinic. I'm having a problem that I think I should check out. You know, I hate taking time out of a busy day to go see the doctor, but it seems like a good idea to check into things before they become a bigger problem, even if you're not sure whether it's important or not. Don't you think so? I mean ...

Maria Certainly Mrs. Mills. So, did you want to make an appointment with one of our doctors?

Mrs.Mills Well, I'm not sure about that. My husband just started a new job and our health insurance situation isn't quite sorted out. So I'm nervous about spending the money. Everything is just so expensive when you move, you know? I can't believe how the costs add up! It's not just the moving expenses it's ...

Maria Yes, it's very costly. So how can we help you today Mrs. Mills?

Mrs.Mills I guess if I could speak with one of the doctors to find out whether it makes sense for me to come in for an appointment ...

Maria I'm sorry, the doctors don't do phone consultations for people who aren't already patients. May I ask you a couple of questions to figure out how best to help you?

Mrs. Mills OK, I guess so ...

Maria What is the problem you're having?

Mrs.Mills Well, I've been kind of tired all the time, and my eyes are watering constantly, and my muscles feel very sore, and my body feels heavy, and I have this headache which won't seem to go away. Do you think it could be allergies? I've never had allergies before. But I had this friend where we used to live who had terrible allergies and sometimes her eyes would get so red that ...

Maria Excuse me, but how long have you been feeling this way?

- Mrs.Mills** Ever since we arrived four weeks ago. This is the strangest thing — but I find myself wondering if I'm not just tired from the move and setting up the house. There are a million little things to do. Every day I wake up and it seems like I haven't even made a dent. Have you ever moved clear across the country? It's so disruptive and ...
- Maria** Yes, it's very disruptive. Have you ever had these symptoms before?
- Mrs.Mills** No! Certainly not. Do you think this is some kind of weird allergy? I'm usually healthy as a horse. In fact my doctor in Wyoming used to say that I was healthier than some of the horses on his ranch. Wow, they were beautiful, his horses. He used to have this one horse that was all white and ...
- Maria** It sounds lovely. It's really up to the doctor to evaluate your situation and decide whether the problem is allergies or something else. Since you've never had these symptoms before and they've been going on for a month now, it sounds like it would be a good idea for you to see one of our doctors to check them out.
- Mrs.Mills** Well, I don't know who my friend saw, but she said the doctor was very nice and helpful, and that she felt better afterwards. Some doctors just aren't very friendly. But I guess that's true in all professions, isn't it? It's just that seeing a doctor is so personal, that it makes it difficult to ...
- Maria** Yes, your choice of doctor is important. Did you particularly prefer to see a woman?
- Mrs.Mills** Yes, I would prefer that.
- Maria** Well, all the doctors are excellent. They're quite booked for the next couple of weeks but we just got a cancellation for Dr. Sanchez, so I could offer you an appointment with her next Wednesday at 3:00. Would that work for you?
- Mrs.Mills** Yes, I suppose it would. The kids will be at their after school program that day, so as long as I'm done by 5:00. Suzanne gets anxious if I'm not waiting there to pick her up when she comes out. She's still getting settled after the move — a new school and new friends — I guess it will take a while. But, she's a good girl and ...
- Maria** Excuse me — 5:00 shouldn't be a problem. Please give me your name, phone number, and address.

Mrs.Mills My name is Donna Mills. My phone number is (781) 665-0197. I live at 84 Hopkins Place, Melrose, Massachusetts, 02176.

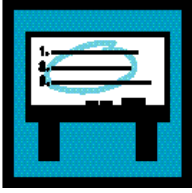
Maria Thank you Mrs. Mills. I have you scheduled with Dr. Sanchez at 3:00 on Wednesday, August 12. Please arrive 15 minutes early to fill out some paperwork. Do you know where we're located?

Mrs.Mills Yes, I pass it on the way to the bank. You know, even the banks out here operate differently than the ones where we used to live. The hours are different and ...

Maria Well, Mrs. Mills, I need to get off the phone. We'll look forward to seeing you next Wednesday. Have a nice afternoon.

Mrs.Mills OK, thank you. Goodbye.

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HOW TO MANAGE CALLS EFFECTIVELY

There are a few simple steps you can follow that will help you manage all your calls successfully.

To get in the right frame of mind, think about how you feel when you are talking to someone in a business situation about social topics and they bring the conversation back to business. What are some ways they might do this that you would most appreciate? What are some ways they might do this that you would not appreciate?

As you learned at the beginning of this chapter, talking to a caller who digresses from the business at hand is like talking to a visitor in a business setting who does the same thing. We all like to be friendly and share social conversation. To a certain extent, having a comfortable social interaction on the job can even make the work flow more smoothly and efficiently.

However, we also have limited time to get our work done, and social conversations can take too much time away from the work we need to do. It's important to be able to maneuver in our workplace conversations, steering them back to business when they start to take too much time away from the work we need to complete.

So, how do you perform this type of maneuvering when someone calls you on the phone? Here are some steps that will help you manage calls effectively every time.

Greet the Caller in a Professional Manner — The way you begin the call can set the tone and direction of the conversation. It's important to greet the caller in a friendly but professional way, creating an expectation that the focus of this conversation will be business.

Direct the Conversation to Business — Focus the discussion on the business at hand by directing the caller's attention to the reason for their call. You can do this by asking "How can I help you today?"

Ask Open-ended Questions — Help the caller focus on why they're calling by asking them open-ended questions that prompt them to communicate the details of the situation.

Bring the Conversation Back to Business — When the conversation wanders from business, refocus it on the matter at hand by saying "Let me ask you a few questions to learn how I can help you" or by asking a specific question about the situation. On occasion, it may even be necessary for you to interrupt the person who's speaking about nonbusiness matters to bring the conversation back to business. Do this politely but firmly.

Avoid Drawing Conclusions — You need to have an adequate understanding of the situation before you decide what action or response is appropriate. Avoid drawing conclusions before you have enough information.

Agree on Follow-up — When you have enough information to decide a course of action or response, agree with the caller what this action or response will be.

Bring Calls to a Close — Summarize what you and the caller have agreed to do to follow up from this conversation.

If Necessary, End by Being Direct — In some situations you may have to come out and say that you need to end the call in order to attend to other business.

In the successful version of the call, notice how Maria followed each of these steps. She:

Opened the call in a friendly, yet professional manner by saying “Good morning, Sunrise Healthcare Clinic, may I help you?”

Directed the call to business by asking “How can we help you today Ms. Mills?”

Asked open-ended questions, such as “What is the problem you’re having?” to gain an understanding of the situation.

Brought the conversation back to business when Mrs. Mills digressed, saying things such as “Yes, it’s very disruptive. Have you ever had these symptoms before?”

Avoided drawing conclusions about the situation when the patient asked her twice if her problem might be allergies, saying “It’s really up to the doctor to evaluate your situation.”

Agreed on follow up with Mrs. Mills saying “I could offer you an appointment with her next Wednesday at 3:00. Would that work for you?”

Brought the call to a close by reviewing the date and time of the appointment, and the time Mrs. Mills needed to arrive to complete the necessary paperwork.

Ended the conversation directly when Mrs. Mills seemed inclined to continue chatting by saying “Well, Mrs. Mills, I need to get off the phone.”



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 which you might need to manage a call with a talkative caller.

What is the situation? Whom will you be speaking with? What is your relationship to this person?

2. **Greet the caller in a professional manner.**

What would you say to greet the caller in a friendly but professional manner?

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5. Bring the conversation back to business.

What would you say to the caller or ask to bring the conversation back to business if they digressed?

6. Avoid drawing conclusions.

What type of information would you need in this situation before you could decide appropriate follow-up actions?

7. Agree on follow-up.

What type of follow-up action or response would be appropriate in this situation?

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8. Bring the call to a close.

What would you say to summarize the follow-up actions you and the caller agreed to do, and to end the call on a friendly and professional note?

9. If necessary, be direct.

What would you say to end the call if the caller wanted to chat once your business was completed and you needed to move on to other things?

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PRACTICING WHAT YOU'VE LEARNED

The best way to practice what you've learned is to practice it out loud. Managing a talkative caller can be a challenging situation, so it's important to practice this skill.

- We suggest you practice the phone interaction you've just imagined by doing a quick role-play, with you playing the person receiving the call, and a friend or co-worker playing the person who is calling.
- Make sure your role-play partner has reviewed what you wrote in the above exercise, so they understand their role correctly.
- You may also wish to discuss with your partner how you'd like them to play this scene: How talkative do you want them to be?

REVIEWING WHAT YOU'VE LEARNED: CHAPTER 7 — MANAGING CALLS EFFECTIVELY

As you've discovered, the steps for managing calls effectively are very simple. All you need to do is:

Greet the caller in a professional manner, establishing a friendly but business-like tone for the conversation.

Direct the conversation to business by asking the caller how you can help them.

Ask open-ended questions that will help the caller explain why they're calling.

Bring the conversation back to business if it wanders by asking questions that will refocus the caller on the matter at hand.

Avoid drawing conclusions before you have an adequate understanding of the situation.

Agree on follow-up with the caller when you have enough information to decide a course of action.

Bring calls to a close by summarizing what you and the caller have agreed to do.

If necessary, end by being direct, telling the caller in a polite but firm way that you need to close the conversation.



Appendix

This appendix provides training material on three additional topics about phone skills:

- How to Make Successful Conference Calls
- How to Manage Voice Quality
- How to Manage Calls With People Who Don't Speak English Well

For each of the topics that you plan to use as part of your "Are you with me?" learning program, we recommend that you build a complete lesson plan modeled on the sequence used in each chapter of this workbook:

- Unsuccessful Call
- Think About It
- Successful Call
- Think About It
- How to ...
- Using What You've Learned
- Practicing What You've Learned

In every chapter, the training material for the phone skill covered is provided in the "How to ..." section. Training material for the three additional topics included in this appendix has also been presented in the form of a "How to ..." section.

The most effective approach for including these and other additional topics in your training program is to develop an unsuccessful call and successful call scenario for each topic addressing the main content points. You will also need to develop questions for the "Think About It" sections of the lesson, as well as the "Using What You've Learned" section. Follow the guidelines in the "How to Use This Book" chapter to design an agenda for your lesson, and facilitate it most effectively.

A simpler but less effective approach is to read the "How to ..." section for the topic and then practice the skills presented by doing a role play.

HOW TO MAKE SUCCESSFUL CONFERENCE CALLS

When they're handled correctly, conference calls can be very effective for long-distance communica-

tion between groups of people. There are a few simple steps you can follow that will help you accomplish your conference call goals successfully.

To get in the right frame of mind, think about how you feel when you are in a conference call. What makes you feel like you're accomplishing business successfully and efficiently? What makes you feel like the communication is confusing and unsatisfactory?

Participating in a conference call should be like participating in a meeting that takes place between a group of people who are all in the same room. Someone needs to own the meeting and keep it on track, and making sure everyone gets a chance to speak. At the beginning, the meeting leader should make sure that everyone has been introduced and that roles in the meeting are clear. Then the meeting leader should review the agenda and make sure everyone understands and is in agreement about the timing and what needs to be covered.

Throughout the meeting, the meeting leader should watch the time, rein in digressions, and manage the flow of conversation to make sure everyone gets a chance to speak. When the meeting comes to a close, the meeting leader should summarize the decisions that have been made, what participants have agreed to do to follow up, and when these action items are to be completed.

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

Plan the Conference Call — Whoever initiates the conference call should schedule when it will take place, identify a room from which to make the call, notify participants, gather input to the agenda, and arrange any other logistics related to the call. The person or group initiating the call should also decide who will lead it. This person should finalize the agenda before the call begins.

Introduce Participants — At the beginning of the conference call, the leader should ask participants on both sides of the call to introduce or identify themselves.

Review the Agenda — After the introductions, the leader should review the content and timing of the agenda, and ask for any additions or changes.

Identify Yourself When You Speak — Speakers should introduce themselves when they speak if their identity will not be obvious to people on the other side of the call.

Stay on Track and Manage the Flow — The meeting leader should manage digressions if the conversation strays too far off track, asking the group to return to the topics at hand.

Without the visual cues for group interaction that are present in a face-to-face meeting, it is important for conference call participants to pay special attention to the flow of conversation. This means making sure others have finished what they're saying before speaking. The meeting leader can assist in this process by managing the conversational flow if necessary, asking people to speak if they are waiting for an opportunity to do so.

Document Decisions — As the call progresses, the meeting leader or a scribe should write down any decisions that are made, confirming them with the group before documenting each one.

Summarize Decisions — At the end of the meeting, the leader should summarize the decisions that have been made by the group.

Review Follow-up Items — Then the leader should review any follow-up items that have been agreed to during the meeting, including circulating minutes of the meeting if appropriate, and confirm when these will be completed. The meeting leader should also discuss with the group if, when, where and how they will meet next.

HOW TO MANAGE VOICE QUALITY

“Voice quality” is a term which describes the feeling and sound of a person’s speech. When you’re speaking to people on the phone, your voice quality conveys a large part of your message. There are a few simple techniques you can use that will help you manage your voice quality successfully.

To get in the right frame of mind, think about how you feel when you are talking with someone on the phone. What ways of speaking do you respond best to? What ways of speaking do you find difficult or ineffective?

Managing your voice quality on the phone should be like managing your voice quality when you are speaking with someone in person. It is even more important on the phone, however, since all the other nonverbal cues, like posture and facial expressions, are missing from the communication.

When you are speaking with someone in person, you use a friendly tone of voice. You speak at a moderate speed, enunciate clearly so that you can be understood easily, and avoid annoying speech patterns when possible. You moderate the volume of your voice so that you are easy to hear, and position yourself at a comfortable distance from the listener.

So, how does this translate into managing your voice quality on the phone? Here are techniques you can use to manage your voice quality successfully:

Friendly Tone of Voice — When you speak with people on the phone, your tone of voice is the biggest indicator of your attitude towards the interaction. Make sure your tone of voice says “I’m pleased to speak with you and ready to be of assistance today.”

Speak at a Moderate Rate — If you speak too fast, people won’t be able to understand you. If you speak too slowly, people will become impatient. The most effective rate is about 125 words per minute.

Enunciate Clearly — Speak clearly, articulating your words carefully and distinctly. Work to improve problems such as mumbling and dropping the ends of words or running them together.

Avoid Annoying Pause Words — People often interject phrases or sounds into their speech, such as “ummmm,” “err,” “like,” and “you know,” that give them a moment to think before continuing to speak. These pause words or phrases can be annoying if they’re repeated frequently. Train yourself to avoid these pause mechanisms whenever possible.

Moderate the Volume — Speak loudly enough to be understood easily, but not so loudly that it is uncomfortable for the listener.

Adjust Your Distance — Place your phone or headset about one inch in front of your mouth. This is the distance that allows people to hear you best when you’re speaking with them on the phone.

HOW TO MANAGE CALLS WITH PEOPLE WHO DON'T SPEAK ENGLISH WELL

When you're speaking with someone on the phone whose English isn't strong, it is important to communicate carefully and with respect. There are a few simple techniques you can use that will help you manage your calls successfully with people who speak English with difficulty.

To get in the right frame of mind, think about how you speak with someone in person when they don't understand or speak English well. What techniques do you use that help you communicate most effectively? What ways of speaking do you find ineffective?

Managing calls with people who don't speak English well should be like speaking with someone in person whose English is difficult.

When you are conversing with someone in person who doesn't understand or speak English well, you make a special effort so they can understand you. If all your efforts to communicate are unsuccessful, and it's important for you to do so, you get help.

So, how does this translate into managing your phone conversations with people who don't speak English well? Here are techniques you can use to manage all your calls with poor English speakers successfully:

Speak Slowly — It is easier for people to understand what you're saying when you speak slowly. It may also give them a signal to slow down their own speech. If they are still speaking too fast, ask them politely but directly to speak more slowly.

Use Simple Sentences — When you use short, simple sentences with small, everyday words you make it easier for a person with limited English language skills to understand you.

Restate What They Said — Paraphrase what the person you're speaking with said so they can confirm that you've understood correctly. It is likely that they will comprehend more English than they can speak.

Say It Differently — If you need to repeat information in order to be understood, say it a different way. Using the same words is unlikely to get a better result the second time.

Get Help — If after a time it becomes clear that you won't be able to communicate, get help. Find someone in your workplace that can understand the other person's language and translate for you. Alternatively, you can ask the person you're speaking with to find someone who can speak English for them.

Write It Down — A final option is to ask the person you're speaking with to write down what they want to say either in English or their own language and send it to you by fax, e-mail or letter. You are likely to understand their written English better than their spoken English. Or, if they write in their own language, it will give you time to find a translator.

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Are you with me?

Common Courtesy On the Phone

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