

CONNECTIONS: Basic Telephone Techniques

© 1995, Meridian Education Corporation

Overview

The impact of telephone communication on the business world cannot really be measured. As society has come to require instant communication and information, proper use of the telephone has become a necessary tool to succeed in business. The caller draws many conclusions about a business from even a brief conversation: *company efficiency, communication skills, friendliness and expertise.* The telephone professional will make sure the customer is satisfied by providing not only the needed assistance, but also a positive experience with the company.

The nonverbal aspect of telephone communication, while extremely important, is difficult to measure. **70% of all communication is nonverbal.** Individuals rely on accurate nonverbal cues to reinforce and clarify what has been heard as well as to avoid confusion (eg. jokes are often effective because of the disparity between the verbal and the nonverbal). Without visual cues, spoken conversation becomes dependent on subtle vocal inflections, timing, word choice and other factors. Therefore, it is imperative that those using the telephone be competent listeners as well as excellent communicators.

The final thrust of this video involves basic skills that all telephone professionals should have: a working knowledge of the equipment; excellent communication skills; and a willingness to handle calls with confidence and expertise. Anyone can master the skills necessary to become a telephone professional.



236 East Front Street
Bloomington, IL 61701
Phone: (800) 727-5507 or (309) 827-5455
Fax: (888) 340-5507 or (309) 829-8621
e-mail: meridian@meridianeducation.com
www.meridianeducation.com

Terms

Viewers should be familiar with the following terms and definitions:

Articulation: Clear and effective speech.

Attitude: The way an individual views things.

Courtesy: Respect for and consideration of others.

Enunciation: Clear pronunciation.

Golden Rule: Treat another the way you would like to be treated.

Greeting: Manner in which a call is answered.

Monotone: No change in voice tone or inflection.

Place on hold: Electronically "hold" the call in the system until the call can be answered.

Screening calls: Method of determining who is calling.

Telephone Tag: Situation in which callers repeatedly fail to reach one another and are continually leaving messages.

Transfer a call: Electronically direct a call to another party.

Vocal Quality: Variation of voice pitch, rate of speech and energy.

Volume: The degree of loudness or intensity of sound.

Role Playing Exercises

You may wish to provide role playing opportunities for viewers. Devise scenarios that will allow them to practice greetings, transfers, holds, as well as some out-bound calls. Provided is a brief list of possibilities. Using your school/company in the role playing adds realism. Another possibility is to have the viewers come up with lists of activities.

Inbound Calls

School secretary

Athletic department

Office receptionist

Guidance counselor

Doctor's Office

Auto parts department

Outbound Calls

Job Inquiry (use the newspaper)

Check availability of clothing item at store

Check price of stereo equipment

Theater box office

Lost & found at bus station

Used car

Introduction

This video illustrates some basic, yet crucial telephone techniques that are often taken for granted. Through the use of examples, both good and bad, the viewer will see the impact of telephone communication skills. Some examples merely illustrate poor habits while others highlight negative behavior which can adversely affect the organization. Positive examples reinforce correct telephone techniques and clarification is provided as needed by the on-screen narrator.

Objectives

The viewer will learn:

- The correct method for answering the telephone
 - through a switchboard
 - in a department
- Proper techniques for
 - placing a caller on hold
 - transferring a call
 - taking a message
- How to leave a message on an answering machine/voice mail
- How to recognize and correct poor telephone skills
- Essential skills needed to place outbound calls

Discussion Questions

QUESTION: Why is making a good impression over the telephone important to a business?

POINT: People make judgments about the quality of service provided by what they perceive over the telephone. The manner in which an employee conducts business over the telephone makes a lasting impression, positive or negative.

QUESTION: Why is it important to speak clearly and enunciate well? How can you judge your own effectiveness?

POINT: Callers need to be able to understand what they hear. Miscommunication can cause errors and misunderstandings which may eventually lead to customer problems. Employees do themselves and their companies a disservice and may actually alienate callers if there is not clear communication. The use of a tape recorder during business calls will allow an individual to listen to and rate themselves. Any problems can be pinpointed and addressed.

QUESTION: What is the value in returning phone calls?

POINT: The employee and company foster a positive reputation by responding promptly. There is also a possible benefit from the returned call.

QUESTION: How does the "Golden Rule" relate to your telephone image?

POINT: If we treat callers the way we would like to be treated, our image will remain professional and positive. Most callers will respond with similar behavior and even those who do not, will not affect company image.

QUESTION: Discuss the role of nonverbal communication while speaking on the telephone.

POINT: Individuals rely on nonverbal cues to aid in comprehension. Without being able to see the other individual, we may mistake the message being sent. Nonverbal communication reinforces our

understanding. By the same token, we continue to use non-verbal communication when we speak over the telephone and many of these "messages" are picked up by the caller.

QUESTION: What kinds of procedures should be used when placing a caller on hold?

POINT: The purpose is to handle the caller with respect in every situation. We should always ask a caller's permission before placing the call on, hold; check back often (at least every 30 to 45 seconds); and give the caller options by asking if we may return a call to them.

QUESTION: Why should an employee always offer to take a message? What information is necessary to obtain?

POINT: Offering to take a message gives the caller some additional options and indicates that the company is willing to make an extra effort. It also helps the individual making the return call. The following information should always be present in a message: name, phone number, date, time, your initials and any message.

QUESTION: What is the best greeting to use when answering a switchboard? Why?

POINT: The phone is answered by thanking the customer for calling the name of the business, the employee gives their name and asks how the call can be directed. (Thank you for calling _____. This is _____. How may I direct your call?) We thank the customer for calling as a way to show our appreciation for their business. Standardizing the greeting ensures that everyone does it the same way. Using your name gives the caller a way to identify personally with someone in the company. Most switchboard calls are directed elsewhere so we save time for ourselves and the caller by asking how we may direct the call.

QUESTION: What is the difference in greeting when answering a department call?

POINT: The employee identifies the department and then themselves. This gives a caller additional information. [(department name). (your name) speaking.]

QUESTION: Why is smiling over the phone beneficial?

POINT: Smiling reduces the possibility of sounding angry, improves pronunciation and quality of voice tone, and allows for a friendly conversation.

QUESTION: What happens when someone speaks too slowly? Too quickly?

POINT: Too fast and the caller cannot understand. Too slow and the caller becomes impatient or the speaker may sound unsure.

QUESTION: What can you do to help an angry caller?

POINT: Trying to understand why a caller is upset is very helpful. Another technique is to restate the problem to make sure you understand. Allow time for a caller to vent frustration and offer appropriate responses so the caller knows you are listening. Do not take the caller's anger personally - try to be objective. And most important, take responsibility for solving the problem so that call stops with you.

QUESTION: What are some things to keep in mind when leaving a message on an answering machine?

POINT: It is helpful to remember that someone will be attempting to write down the information while listening to the message. Speak clearly and slowly enough to be understood; the day and time of the call should be noted; anything that could be unclear should be spelled out (names); it is perfectly acceptable to leave a brief message; and the phone number should be repeated twice.

QUESTION: What are the procedures to be used when making an outbound call?

POINT: Making a call takes forethought, planning not only the purpose of the call but what you intend to say. The following techniques can be helpful: plan the call; identify yourself and the reason for call; ask if it is a convenient time to talk; deliver the message clearly; summarize the call; schedule a return call if necessary; and thank the individual for taking time to speak with you.

QUESTIONS: Occasionally a caller is difficult to understand, either because of language barriers or perhaps sloppy diction. Can you think of some ways to help yourself and the caller?

POINT: When a caller is difficult to understand, an employee may suffer an increased anxiety level which may in turn affect the caller. The initial response should be a calm tone and a slightly slower rate of speech. Repeat all information back to the caller to verify accuracy and ask for spellings on everything.

How To Use The Program

This program was designed to be used as a basic introductory examination of the proper procedures for answering the telephone and other common activities associated with telephone use in a business setting. We have attempted to use humor in depicting *poor* telephone habits or skills while stressing the correct way to handle situations by using examples. In some cases, the incorrect method is followed by the correct one. Many of the topics covered will remind viewers of things they already know; some will be new concepts.

The overall objective of this program is to encourage each viewer to reach the same level of expertise and professionalism. To that end, the video may be used with new employees as well as seasoned veterans.

It may be helpful to use some of the discussion questions as a pre-viewing activity as well as a post-viewing activity. The video may be stopped at any point to discuss specific issues or reinforce specific behavior

Activities

1. Choose several scenes from **CONNECTIONS: Basic Telephone Techniques**. Have the viewers close their eyes while listening to the audio. Ask them to describe the characteristics of the people they heard:
 - a. Tone of voice
 - b. Positive or negative image
 - c. Professional or unprofessional image
 - d. Helpful or not

Discuss your feelings as a caller about the individual; the company.

PURPOSE: It is important to recognize that messages come across *very* clearly in the tone of voice, inflections, and attitude.

2. Have someone (or four different people) repeat the following sentence, placing the emphasis on a different word each time. Discuss the different meanings that result:

I have a new job.

I **have** a new job.

I have a **new** job.

I have a new **job**.

PURPOSE: Use this activity to show how a slight variation in tone or emphasis can alter the meaning of a message.

3. The following activity will require two volunteers to participate in front of the group. Sit the individuals back to back. One person will be asked to share a recent experience (vacation, plot of a recent book, movie). The second person will be told he/she cannot respond in any way. The audience will act as observers. At the end of the exercise, ask the speaker to share his/her feelings about talking to the listener. Then, ask the listener to tell you what he heard. Ask the audience to respond to what they saw and heard.

PURPOSE: Feedback is an essential ingredient in communication, particularly if there are no visual cues from the speaker. The speaker should feel very uncomfortable not having any feedback from the listener. A good listener needs to signal the caller with verbal feedback or cues that he/she is listening.