

Improving Telephone Skills



Name: _____

Improving TELEPHONE SKILLS

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Introduction

Information and skills you will acquire

Getting the most out of this booklet

Improving Telephone Skills is one of a valuable and user-friendly new series of easy-to-read booklets created specially to help you develop at work. The materials have been created from actual experience in workplace training. Experts have pooled their knowledge and experience to involve you in learning new skills and building on those you already have. The booklet is divided into clear *sections*, containing specially devised *activities* and a *mini project*, to allow you to practise as you learn.

Improving Telephone Skills will enable you to:

- Decide whether the telephone is the best way of communicating, depending on the situation.
- Identify the do's and don't's of using the telephone.
- Ask questions to get the information you need and sort out problems. Take down messages clearly and accurately.
- Receive and make calls effectively.
- Understand callers' anger and frustration. Avoid and defuse callers' anger.
- You may want to work your way through the booklet from start to finish or focus on an area of interest.
- Once you have completed the questionnaire on page 4 you will be able to see clearly which topics you need most help with, and which areas you can safely leave out.
- The questionnaire will also allow you to create your own learning plan for which an example and space is provided on page 5.
- You may want to ask your supervisor or another colleague for their views on the areas you could work on, or for help with the activities in the booklet.
- As you may want to use the booklet for future reference, you may want to write the answers out in rough first and then write them in the booklet.

Section I

THE TELEPHONE AS A MEANS OF COMMUNICATION

Appropriate use of the telephone

The telephone is probably one of the main points of contact most people will have with your organisation. Using the telephone effectively is therefore critical to the delivery of customer care. It will help you to make and keep customers.

When we use the telephone people cannot see our expressions or body language and we cannot show them anything visual such as plans, details or records. This is why we need to pay special attention to our pace and tone of voice, in order to convey the right message.

Advantages

The telephone has many advantages over other forms of communication.

- It is fast.
- You know immediately if you have contacted the right person.
- You can get a quick answer or feedback.
- You can discuss something straight away.

Disadvantages

There are also disadvantages.

- Spoken language can easily be misinterpreted or be misunderstood.
- There is no written record if a decision is made.
- It can be more impersonal than a face to face discussion.
- It is difficult to convey complex information, figures or visual information, such as a plan.
- Sensitive issues are often better handled by letter than over the telephone.

Activity I

Tick the boxes below to show in which situations you would use a telephone.

1. To talk about a sensitive situation to a colleague.
2. To confirm a hotel booking next month.
3. To find out someone's availability for a meeting.
4. To clarify some simple information.
5. To tell someone that you have finished the job they are waiting for.
6. To confirm some fairly complex information involving accounts.

You will find the feedback on this activity is on page 22.

What sort of calls do you have to handle?

It is important to be aware of the type of call you are making, because you may need to prepare for the call and handle it in a particular way.

The sort of calls you make or receive will depend a lot on your job.

The different sorts of calls you are likely to make and receive probably include:

- asking for information, e.g. when supplies will be delivered
- confirming information, e.g. a holiday booking
- passing on information, e.g. how to use a piece of equipment
- getting someone to do something, e.g. paying an invoice
- complaints, e.g. work which is overdue
- clarifying information, e.g. what has been included in the monthly accounts.

Activity 2

In developing your skills it will be helpful to identify the sorts of calls you make and receive in your job.

| Type of Call | Make | | | | Receive | | | |
|---------------------------------|-------------|-------------|------------|--------------|-------------|-------------|------------|--------------|
| | hardly ever | quite often | very often | all the time | hardly ever | quite often | very often | all the time |
| Asking for information | | | | | | | | |
| Confirming information | | | | | | | | |
| Passing on information | | | | | | | | |
| Clarifying information | | | | | | | | |
| Handling complaints | | | | | | | | |
| Getting someone to do something | | | | | | | | |

Example: If you make calls to pass on or confirm information, you need to make sure that the information is accurate and you have it in front of you.

Example: If you have to ask someone to do something, you need to be clear about the action required and when it is needed.

The Do's and Don'ts of using the telephone

Do:

- give the person you are talking to your full attention
- prepare for the call and have all the necessary paperwork with you
- always get back to people when you promise
- give people a choice of holding or getting back to them
- be patient – some people are nervous or hearing impaired
- sound interested.

Don't:

- leave people waiting on the line for more than a minute
- lose your temper.

Key Learning Points

- The telephone is probably one of the main points of contact most people will have with your organisation, so it is very important for calls to be handled effectively.
- Telephone calls have many advantages over other forms of communication, for example: speed, immediate feedback, being able to ask a lot of questions.
- There are also disadvantages, for example: there is no written record to confirm what is said, it can be impersonal for sensitive situations, people can't see each other's reactions and expressions.
- Whether you use the telephone or write or meet with the person depends a lot on the situation. You will have to decide if the telephone is really the best way of putting your message across.
- There are basic do's and don'ts for using the telephone. These include: giving the other person your full attention, staying calm, conveying to the person that you are sincere and interested in helping them.

Section 2

RECEIVING AND MAKING TELEPHONE CALLS

Asking the right sort of questions

One of the key skills to help you handle your telephone calls effectively is being able to ask questions. This helps you to find out the information you need and also keep control of the call if necessary. Through asking questions you can:

- reduce the length of the telephone conversation
- prevent the customer from giving unnecessary information
- focus on the real problem and sort it out
- convey to the caller that you seriously want to help them.

There are three different sorts of questions that you can ask: open questions, closed questions and factual questions.

Open questions

Open questions are useful when you want more information, or if you want to encourage silent or shy people to talk more. This is because people cannot just answer 'yes' or 'no' to these questions. Open questions begin with:

- What...?
- Who...?
- Tell me about...
- Where...?
- Why...?
- When...?
- How...?

Example: 'How did you travel to work this morning?'

Example: 'What happened after you pressed that switch?'

Closed questions

Closed questions can help you get to the point. They ask for specific answers. They can be answered by a simple 'yes' and 'no'. They are useful when you are dealing with a caller who is long-winded or vague. They are also useful for checking details.

They begin with verbs such as:

- Do...?
- Will...?
- Did...?
- Can...?

Example: 'Did you travel to work by bus?'

Example: 'Did you press the red switch at the side?'

Factual questions

Factual questions are useful if you want to obtain specific information.

Example: 'What time did you arrive at the meeting?'

Using questions to handle callers

- **The vague or confused caller.**
Ask open questions to find out the nature of the query then ask closed questions to find out more detailed information.
- **The long-winded caller.**
Ask closed questions to focus the caller.
- **The angry caller.**
This will be dealt with in the section on handling angry and upset callers. See page 18

Activity 3

What kind of questions do you ask?

1. Think about the people you talk to on the telephone during the day. Make a list of the most frequent questions you have to ask.
2. Then write down whether you think open, closed or factual questions are the best way of handling each call.
3. Make a brief note of why you have chosen that particular way of asking a question.

| Most frequent questions you have to ask | Should you use open, closed or factual questions? | Why have you chosen that particular way of asking the question? |
|---|---|---|
| | | |

FEEDBACK: You may have put down some of the following points in column three:

1. Open questions to get the customer talking.
2. Open questions to find out as much information as possible.
3. Closed questions to find out specific information.
4. Factual questions so that you can complete a form.
5. Closed questions to stop the customer rambling.
6. Open questions to find out the customer's views and feelings.

Remember that other points you have put down may be just as important as these.

How to receive calls effectively

Say 'Good morning,' 'Good afternoon' or 'Hello'.

Give the name of your section/department if the call has come through the main switchboard.

Give the name of your organisation if calls come to you first.

Give the name of your section/department if the caller has a direct line to you.

Give your name

Whether you give your name depends on your organisation's policy. It can sometimes be too much for the caller to take in, after you have said 'Good morning', given your name and then given the name of your organisation.

Listen

Listen to what the caller has to say.

Allow the caller to say what they want to before you interrupt, otherwise it can seem rude and it appears that you have not got time for them.

Ask questions

Ask open questions to find out what the caller wants.

Example: 'What sort of washing machine do you have?'

Example: 'When was your dustbin last emptied?'

Example: 'Where do you live?'

Ask closed questions to find out more specific details.

Example: 'Is the lid closed when you press the switch?'

Example: 'Did you return the form by the required date?'

Example: 'Would that be acceptable to you?'

Progressing the call

Explain how you can help the person, giving options if appropriate.

Make notes on the main points of the conversation and any details such as name, address, etc.

Ending the call

Summarise verbally the main points of the conversation, particularly what has been agreed.

Give your name for future contact.

Close politely, e.g. by thanking the caller for ringing.

How to make effective calls

Prepare yourself for the call.

Think about what you are going to say. Make notes if necessary.

Make sure you have any relevant paperwork with you.

Starting the call

If you reach a switchboard first, give the name of the person you would like to speak to and their section/department.

If you have a direct dial number and the person answering does not give a name, ask for the person by name, e.g. 'Could I speak to Marian Lewis please?'

If you reach a voicemail or recorded message, say your name, telephone number and reason for calling.

Say who you are and why you are ringing.

Progressing the call

As with calls you receive, ask open questions to start with if you want to find out as much information as you can.

Ask closed and factual questions to clarify specific points of information.

Give options if appropriate.

Ending the call

Summarise the main points of the conversation – particularly what has been agreed.

Close politely, e.g. thank the person for giving you the information, helping you to sort the problem out.

Activity 4

What advice can you give someone about receiving and making effective telephone calls?

Mira is new to your office. People have noticed that she is not very confident about using the telephone. Here are the mistakes she is making.

1. She avoids picking up the telephone when it rings and leaves someone else to do it.
2. She does not ask people to spell out their names and addresses if she is not sure about how to write them down.
3. She forgets to note down people's telephone numbers.
4. She just says 'Hello' when she picks up the phone.
5. She is not able to find out exactly what the caller wants.
6. She gets flustered and passes the phone on to some-one else when the caller gets angry.

You have been asked to have a word with Mira to help her use the telephone more effectively. What advice could you give to her?

You will find the feedback to this activity on pages 22 and 23.

Key Learning Points

- Asking questions is a key skill in making and receiving calls effectively.
- Open questions enable you to probe and find out more information.
- Closed questions enable you to concentrate on specific information as they require only a 'yes' or 'no' answer. They are useful to confirm information.
- Factual questions are important to obtain specific information.
- When you receive a call, listen to the caller first of all. Then find out what the caller wants and how you can help by asking different sorts of questions.
- Make notes as you go along.
- When you make a call, prepare for the call beforehand. Have all the paperwork at hand.
- Close every telephone call politely.

Section 3

TAKING TELEPHONE MESSAGES

Taking down the correct information

Telephone calls can be very important, even a matter of life and death. Therefore it is very important to listen carefully when you need to take a message. Make sure that you:

- keep a message pad and pen by the phone
- don't worry about slowing the caller down to ask for spellings or for a point to be repeated.

Example: 'Could you spell your name, please?'

Example: 'I didn't catch your last point, would you mind repeating it?'

You do not always need to take down a detailed message for someone else.

Get to know the kinds of calls

If you frequently answer the telephone for someone else, try to get to know the sorts of calls they receive and which ones you could handle without passing them on. If the person frequently receives, for example, cold sales calls or calls from prospective job applicants discuss how they want you to handle them. For example, do they want the caller to send information, do they prefer the caller to ring back at a certain time, or should they send in a C.V?

Check your message

Next time you take a telephone message, check that you have included:

- who the message is for
- the date and time of the telephone call
- the caller's name
- his/her section and telephone number
- a brief summary of the message
- any action needed, e.g. will the caller ring back or should they ring the caller?
- your name.

Finally read the message back to the caller and check that it is correct.

*See also
booklet 2, 'Sending Memos
and Messages'.*

Use a special form for messages

Look at this example of a telephone message taken down on a form.

| Telephone message | |
|-------------------|---|
| Date/Time: | 29/4/20XX 3.30 pm |
| Message for: | Jane Roberts |
| Caller: | Bob Smith |
| Address: | 19 Acacia Avenue, Sanley, Redford NN1 2NZ |
| Tel. No/Ext. | Tel: 0131 765432 Ext.678 |
| Fax/E-mail | Fax: E-mail: |
| Message: | Caller would like an update on the repairs to his food mixer model number QWE. Could you ring back tomorrow morning before 11 am? |
| Taken by: | Zoe Clements |
| Passed to: | Jane Roberts |

Activity 5

Use this telephone message form the next time you answer a call.

| Telephone message | |
|-------------------|--------|
| Date/Time: | |
| Message for: | |
| Caller: | |
| Address: | |
| Tel. No. | Ext. |
| Fax: | E-mail |
| Message: | |
| Taken by: | |
| Passed to: | |

Key Learning Points

- It is very important to take down the correct information in your messages. A form is a helpful method of doing this.
- If you regularly answer a certain type of call for someone else, e.g. calls from sales representatives, ask them how they want you to handle this type of call. A detailed message may not be necessary.
- Always read the message back to the caller.
- Always ensure that messages, particularly urgent ones, are followed up.

Section 4 HANDLING DIFFICULT CALLERS

Why do callers get upset and angry?

Handling angry and upset callers is probably the most difficult and stressful aspect of telephone work, particularly if you have to handle a lot of this type of call.

One of the first steps is to understand why people get angry or upset. People get angry and upset about:

- having to make a complaint
- being passed from person to person in the organisation
- being kept waiting on the line
- not being taken seriously
- not having a call returned
- having a poor image of the organisation
- being told that things cannot be done.

Often, people who do not feel angry in the first place, soon become angry when they experience some of the above factors.

Activity 6

Angry and upset customers cannot be avoided altogether. However, you can make things better for yourself.

Think about each of these situations. What would be the best thing to do in each case? Take a separate sheet of paper for your answers.

Avoiding callers' anger

1. If you receive a call from someone who has been passed from person to person in the organisation and you too are not quite sure how to deal with it.
2. If a person needs to hold on the line for some reason.
3. If you think the call is trivial.
4. If you have a message to call someone back.
5. If your organisation has a poor image.
6. In situations where you cannot give the caller what they want or they are angry.

You will find the feedback to this activity on page 23.

Defusing callers' anger

Once your caller is angry the only positive way out of the situation is to defuse the anger. This can be done in the following way.

- Listen to what the person is saying and give them a chance to let off steam without interrupting.
- Sympathise by making supportive statements.

Example: 'Yes I know that you have been waiting a long time.'

Example: 'I understand that you have had problems with this.'

These sort of statements make the caller think that you are on their side, without admitting blame.

Reassure the caller that you are there to help sort the problem out for them.

Ask questions

Ask open questions and closed questions to understand the nature of the problem and get the details required. Focus on sorting out the problem. Don't be side-tracked by details of telephone calls which weren't made or what someone else said to the caller.

Explain

Explain the best action, giving the caller options if possible.

If your organisation is not at fault or there is nothing you can do, explain why this is the case. Explain simply and fully why something is not possible. Give the caller time to think through and accept the information.

Summarise

Summarise what you have agreed or what has come out of the call, giving time scales if necessary.

Try to finish on a positive note, leaving the caller feeling as if they have been treated fairly.

Follow up

Take any follow-up action. Telephone or write to the caller to let them know that you have followed up their query or complaint.

Unreasonable callers

You will come across some people who will not accept any explanation and will push the system as far as they can. These sorts of people tend to either get abusive or else write letters of complaint to people in authority.

If a caller becomes abusive simply tell them that if they

continue with their abuse you will not be able to help them. Warn them that you will have to put the phone down if they continue. Then if they do continue, you can put down the phone. Make sure that you take all the details down such as date and time of the call, the caller's name (if given), the nature of the abuse. This type of caller is quite likely to ring up your manager or director and complain that you have hung up on them.

Keep notes on complaints you handle

The other type of unreasonable or unsatisfied customer tends to write in with letters of complaint. In all situations where you have handled an angry person or a complaint of some kind, make a note of the details. Then you can provide information to support the way you handled the situation. This is particularly important where the call has not been resolved positively.

Mini Project

How do your colleagues handle angry calls?

Ask two or three of your colleagues how they handle upset or angry callers. Arrange a convenient time to ask them the following questions. Take a separate sheet of paper to make notes of their answers.

1. What do you do to calm down angry or upset callers when they first come on the line?
2. What do you do if they are abusive?
3. What happens if they do not accept your explanation?
4. In what sorts of situations do you pass the person on to your supervisor?
5. How do you keep calm?
6. What do you avoid doing with this sort of caller?

FEEDBACK: Compare what your colleagues have said with how you deal with these calls. What new ideas have you found out? Make notes in the space below.

Key Learning Points

- One of the first steps in handling an angry or upset caller is to understand what they are upset about.
- Try to avoid doing the things that we all find annoying, such as passing the caller from person to person and keeping them waiting on the line.
- Always take every call seriously even if it is not important to you.
- Always try to use positive language rather than telling people what you cannot do.
- Try to defuse anger by listening to the person and trying to reassure them that you want to help.
- Always focus on the problem and what you or the caller can do to resolve the problem.
- Always take notes when you are listening to the caller. This will help you if the caller decides to take a complaint further.

2. Ask callers to spell out names, places, etc. you are not familiar with or think you may have misheard.
3. Always take the caller's details – name and telephone number in case they need to be contacted again.
4. Say 'Hello' or 'Good morning', etc. and give the name of the section when you pick up the telephone.
5. Find out what the caller wants by asking open and closed questions. If you cannot sort out the problem offer to find out and ring the caller back, or give them the option of talking to someone else if there is someone available.
6. Try to keep calm. You could shadow an experienced colleague when they are dealing with an angry caller. In this way you will be able to pick up tips and techniques.

FEEDBACK TO ACTIVITY 6

1. Avoid passing them on to someone else! Take down their number and details of the query and tell them that you will get the person responsible to ring them back.
2. Give them a choice of either holding or you ringing them back in a few minutes.
3. Always take every call seriously even though to you it may be something trivial.
4. Always return calls and, if possible, at the time agreed or specified. If the person is not available always leave a message to say you phoned.
5. Do what you can to make your callers' experiences positive and productive. It will make your working relationships more pleasant and less stressful.
6. Try to get the caller thinking along positive lines through the use of positive language.

Example: 'We can repair your washing machine any time after 29th April' instead of, 'I am sorry we can't repair your washing machine until 30th April.'

Try to focus on what you can do rather than what you can't do.

Do you ever put the telephone down wishing that you had handled a call more successfully?

Are you organised or do you flap around trying to find bits of paper while you are still talking to the person on the other end?

Do people complain about the telephone messages you pass on to them?

When the person on the other end of the line becomes angry do you panic and give into them?

Do you fear picking up the telephone?

How often have you forgotten what you are going to say or become confused when making a call?

If you have any of these problems when using the telephone then this booklet will help you to overcome them and to use the telephone effectively.



INVESTOR IN PEOPLE

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