

Business Managers Phone Etiquette Checklist

Compliments of [The Telecom Broker](#)

- ✓ **Smile!** Make sure the person doing the company's main outbound auto attendant is smiling when doing the recording!
- ✓ **Be prepared when making calls.** Establish who you are, the purpose of the call and credibility immediately. Introduce yourself and your company, recap the reason for the call and what you're trying to accomplish.
- ✓ **In-bound calls** – Simple, professional greeting with a basic introduction. Smile while answering the phone! No gum chewing or eating.
- ✓ **Enunciate and slow down!** Don't act rushed, the caller is THE most important person to you right now. Make them feel special, like you really care what's happening.
- ✓ **Never interrupt a person who's talking to you.** Never argue! If a call becomes unpleasant, ask the caller to hold and take the call in a private place, or escalate to your manager.
- ✓ **No personal calls** on company time, employees should be focusing on the positive, dynamic needs of the business and it's customers, NOT the drama and challenges that may exist in their daily personal and family life.
- ✓ **Transfers and holds - ask permission** to transfer a call or to put a caller on hold AND WAIT FOR THEIR ANSWER. Use the term "one moment please" if required, not "wait a second". Make sure you have asked your caller if they will take voicemail if the party is not available.
- ✓ **Be a competent phone operator.** Anyone and everyone from the receptionist to the President who uses the phone for business must be trained. If cell phones are the rule or used as an extension of an employees UCaaS seat, this goes double for cell phone training / integration. All employees should understand AND PROVE COMPETENCY:
 - 1) *How to transfer calls inside the facility, including announcing a caller before transfer (warm hand-off) and putting callers directly into another's voicemail.*
 - 2) *Transfer calls to a location outside of the company; including three way calling with transfer.*
 - 3) *Retrieve a call that is on hold or in process of transfer.*
 - 4) *Other professional customer facing time-saving skills are dropping a caller while on three way calling, asking a question of another employee before transfer, and then retrieving the call w/o transfer; setting up speed dialing lists.*

E-Dude's Business Phone Etiquette Checklist v2.1

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- ✓ **Be polite to everyone**, like you're talking to your grandmother. Better sickly sweet than rough and brash. Have employees practice until they get it right.
- ✓ **Think of all calls as a face to face real-time discussion** and listen actively, [learn the active listening skills at the end of this file.](#)
- ✓ **Keep notes while talking**, keep track of who's who in the organization you're dealing with.
- ✓ **Use peoples names frequently**, ask permission to call them by their first name if appropriate.
- ✓ **Make sure you thank the called party** for taking your call and the time spent in talking with you before hanging up.
- ✓ **Ask permission** before asking detailed questions or sharing sensitive information.
- ✓ **Have a company communications policy** that deals with what may be discussed on the phone, scanned, sent via e-mail or fax and so forth.
- ✓ **Your outbound greeting should be short and to the point.** Try to update it daily or weekly so the caller is assured you check your voicemail regularly.
- ✓ **When leaving voicemail**, make it simple and to the point, state your name, company and a short reason for the call. Make sure to include your phone number with the area code. There's nothing worse than making the called party listen all the way to the end just to realize you left off your name or phone number.
- ✓ **Outbound calling times** are 8:30AM to 9PM weekdays. Weekends it's 10AM to about 8PM, maybe 6PM on Sundays.
- ✓ **Be careful hanging up the phone**, use the "release call" button and don't drop or slam down the receiver. Put callers on hold if you must talk to another on your end while they are on the line.
- ✓ **Make sure all employees understand** how to properly report and deal with on-site 911 emergencies; including address, building and floor number locations, some VoIP phone service may not be properly configured to display E-911 origination.

SLOW DOWN - ENUNCIATE!

THE CALLER IS THE ONLY JOB RIGHT NOW

HOW TO BE AN ACTIVE LISTENER!

Active Listening

Active listening is listening with a purpose. It is more than just hearing which is the act of perceiving sound. When you hear a sound or noise, you are receiving aural stimuli. Listening goes beyond just registering that there is a sound in the environment. It involves receiving and interpreting the aural stimuli, and creating meaning from the sound.

Using active listening skills can help to minimize or avoid unnecessary conflict. It can bring clarity and understanding to conversations and interactions with other people. To work, the listener focuses on the words and the feelings of the speaker for understanding.

Active listening happens when the listener hears the various messages being sent, understands their meaning, and then verifies the meaning by offering feedback.

Characteristics of active listeners:

- Spends more time listening than talking
- Let's the speaker finish his or her own sentences
- Let's the other person finish speaking before responding
- Allows the other person to speak and does not dominate the conversation
- Aware of own biases
- Asks open-ended questions
- Focuses on what is being said, not what one's response will be to the Speaker

To develop these skills and characteristics, it helps to be aware of some verbal active listening techniques, and nonverbal techniques.

Have someone help you test your skills with the active listening checklist above.