

TELEPHONE

ETIQUETTE

Where do you rate on your telephone skills? Check the box next to each item you already do today.

ANSWERING



Rehearse your introduction.

"Thank you for calling Discover Financial Services. This is Joe. How may I help you?"

Address caller appropriately.

Use Mr., Mrs., or Miss when appropriate. Know the right cultural greetings for international clients and use those to show respect.



LISTENING



Do not interrupt.

Jot down a note if a thought comes up while someone is speaking. Ask to speak when they have finished their comment.

Listen for what is NOT being said.

Ask clarifying questions to ensure you identify concerns and work to address them.

SPEAKING



Think before you speak.

Is the information you are providing correct for your audience?

Be organized.

Be organized in your responses. Try to simplify complex issues to the degree possible.



HOLD PLEASE



Know when to use the hold button.

If it will take more than 1-2 minutes, ask the caller if you can call them back.

Ask first.

Don't just say, "Let me put you on hold." A sign of respect is asking before taking action.

CLOSING



Provide a re-cap.

Briefly summarize the call's purpose and results. Review any necessary next steps.

Thank the caller(s) for their time and attention.

Appreciate any patience shown by the caller as well.



VOICEMAIL



Talk slowly.

Be clear and leave your name, company name, phone #, and the reason for your message.

Listen to the voicemail greeting.

There may be an alternative contact if the person you are calling is out of the office.

How many boxes did you check?

12: Congratulations! You are an expert and could probably teach others some tricks of your own.

9 to 11: You are closing in on being a subject matter expert. Work on some of these and you will be a pro in no time!

5 to 8: Practice these skills and mark your calendar to re-rate yourself in 3 months and see where you have grown!

0 to 4: Eek! You have some work to do, but it is not impossible. Print out these tips and refer to them frequently.

