

# 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.

