



Telephone Techniques

Learning Outcomes

By the end of this unit the learner will be able to:

- ✓ Outline various Communication Skills
- ✓ Identify And Explore Telephone Techniques

Telephone Techniques

Empathy

The Importance of Empathy

We can do a lot to keep problems from happening in the first place. If you develop your **empathizing** skills, you can put yourself in the other person's shoes. This doesn't mean that you do not have to agree with them, but it helps you see where they are coming from.

If you are practicing being empathetic (and we recommend that you do) you should avoid phrases like, "I agree" or, "Yes, that's true." Don't reinforce a concern, either. You can simply express your empathy by **rephrasing** the key topic of the person's statement. Some phrases you might use include:

- "I hear..."
- "I understand..."
- "I think you're saying..."

Rephrasing before answering gives you:

- A chance to empathize with the concerns
- An opportunity to show the person that you understand the concern
- A moment to think of an appropriate response

It's also important to check that the other person is satisfied with your level of understanding or your explanation. Your ability to empathize will play an important role in your overall communication skills and your ability to foster a positive and productive environment.

Dangerous Misconceptions

Although we believe that we are being clear when we speak, we're not always being as efficient as we think. Here are some important misconceptions for you to keep in mind when you are having a conversation:

- People always pay attention when you are speaking to them.
- When people say they are paying attention, they really are.
- When someone says "I know," they really do.
- Saying something over and over will ensure that your listener understands.

Defining Communication

What is communication? It is more than just sending and receiving messages; it is about understanding those messages. There are lots of things that can get in the way of understanding a message, such as:

- Noise
- Language
- Culture
- Disinterest
- Experience
- Education
- Emotion
- Vocabulary
- Mood

Here are two tips for removing those barriers.

- **Empathy:** Make a conscious decision to try to understand. We often talk about empathy as taking off your own shoes to walk in someone else's. This helps you to understand where they are coming from and to set aside your judgments or biases in order to give your full attention to the other person.
- **Rephrasing/Reframing:** This technique gives you a chance to think of your response. It also allows you to demonstrate that you understand while putting it into words that you can relate to.

Remember the saying: "We have two ears and one mouth so we can listen twice as much as we talk."

Body Language Basics

Much of our face-to-face communication is through body language. While we deliver a message through words, we are also emphasizing, confirming, or even negating what we say through our tone of voice and our non-verbal body language.

Facial Expression

This needs to be pleasant, or at least neutral. The face should be relaxed instead of tense to convey that you are comfortable with your role.

Smiling

Smiles are always welcome and help people to relax. When we are tense, however, our smiles can look like grimaces. Practice smiling in a mirror and get comfortable with offering more smiles. This shows that you like what you are doing.

Eye Contact

When you speak with people, your eye contact needs to be steady and confident. Don't stare people down, but do look at them. While there are cultural aspects to eye contact, it's our position that you need to look at people so that they see you are being genuine and honest. Also, if you are nervous you will tend to blink

more frequently which can make it look like you have something to hide. Try to relax so that you blink at a more normal rate.

Overall Message

This needs to be welcoming, confident, and comfortable. Even if we are incredibly busy, our body language should show that we are interested and focused on this conversation with this person at this time. Leaning into the conversation, avoiding distractions such as phone calls or people at the door, controlling nervousness, all convey positive messages through our body language.

Voice

Your attitude is projected through your voice as well as your body language. Make sure your body language always says, “I’m here to help as best I can.”

When your voice is annoyed, impatient, or condescending, the other person may become angered or angrier. Speak with a calm, firm, caring, soothing tone. Your communications will be more relaxed, more pleasant, and better understood.

The speed and rhythm of your speech is important as well. Clear communication includes appropriate pauses and inflections to support the words being said.

Here are some tips:

- As people talk to you, say to yourself: “Which means that...”
- Be clear in your own mind what you hope to achieve.
- In sales or when dealing with problems, take the lead in conversations wherever possible. This gives you the psychological advantage, putting you in a stronger position to direct the conversation along lines that are favorable to you.
- Check your understanding with your six helpers: why, what, where, when, who, and how.
- Talk less than you listen.
- Try silence.

Asking Questions

We spend a lot of our lives asking and answering questions, but we aren’t always aware of how we ask questions. Open questions in particular often give us difficulty, which is unfortunate, since they are the most important ones for us to become skilled at using.

Closed questions can be answered with a single word or two, or a simple yes or no. They can begin the closing process in a conversation, or provide confirmation of a detail, but they don’t usually lead to gathering more information. Where most people need more practice is asking the **open question**, those where the listener is given a chance to explain, to tell how they feel about an issue, or offer suggestions.

Open questions give us more information because:

- They encourage other people to talk
- We get opinions and ideas from others
- They can help us determine if people have interpreted what we say correctly
- They can help us arrive at consensus much more readily

Good open questions include:

- “What is your opinion?”
- “How do you think we should solve the problem?”
- “What would you do in my shoes?”
- “Tell me more about...”

Note: Be very careful about “**why**” questions. All too often these questions sound like accusations, and the listener immediately becomes defensive.

It is **easier to build relationships** with potential customers if we become skilled at asking questions that give us more information about that person and their wants and needs. The questions help us find common ground with someone, show the person we are interested in them, and we put the emphasis on them rather than on ourselves.

Good **customer-focused questions** can include:

- What do you think we can do about this?
- What would you like me to stop doing?
- Would it be helpful if I...?
- Supposing we were to...?
- Help me understand where you’re coming from?
- Can we set a time to talk about the changes we’re prepared to make?
- I’m prepared to... Would that ease the situation?

Telephone Techniques

Telephone Basics

One of the most important things to remember about telephone communication is your **tone**. In significant (though often misinterpreted) research, **Albert Mehrabian** found that when it came to discussing emotions, only 7% of the speaker’s message was communicated by words, and that tone of voice was responsible for about 38% of the meaning, and body language was responsible for about 55%. This means the words themselves played only a very small part in conveying meaning. In other conversations (not the ones about emotions), we know that tone of voice and body language still have a significant influence on meaning.

Your Initial Greeting

Identify the organization, the department, yourself, and then offer to help. Be careful about verbal shorthand or internal jargon. Don't make the caller say, "Is this Velsoft?" or "To whom am I speaking?" Try to make the telephone experience easy for your caller.

Personalizing Service

All customers are important. Together, they represent the sum total of our reason for working where we do. However, each individual customer craves to have their uniqueness recognized and acknowledged in the process of being served. We can appreciate each customer's importance by knowing and using their name.

A Formula to Practice

- Prepare to hear the name.
- Write it down immediately. If you miss it, ask the person to repeat it.
- Ask, "Let me be sure I've spelled your name right. Is that J-a-y-s-o-n?"
- Repeat the name immediately in your next comment to the person.
- Use the name occasionally in the conversation. It's an attention getter at the beginning of the sentence.
- Thank the person and use the name again as you are parting.

Addressing a Person

Should you call a person Mr., Ms., or Mrs., or use their first name? It really depends on the company and whether you have spoken to this person before. Usually, it's best to err on the side of caution and use "Mr." or "Ms." until the customer says otherwise. Remember that the expectation may be different depending on your industry. Know what is appropriate and endorsed within your company.

Your Telephone Voice

Keep these tips in mind for a pleasant telephone voice.

- Speak at the right volume, neither too loudly nor too softly.
- Don't talk too quickly.
- Practice when you start working with a new or unfamiliar phone system. Telephones distort sound to varying degrees, so you need to adapt your speaking voice in order to be understood.
- If you are using a headset, practice with a colleague so you can set the microphone volume at the right level.
- Use a pleasant, friendly tone.
- Speak clearly and pronounce your words carefully.
- If you have an accent that customers or clients might have trouble understanding, spell things out or use simpler language to make sure they have it right.
- Last but not least, smile! Customers can hear a smile through the phone.

Your Listening Ear

Never interrupt. Wait to be sure your caller is finished before you start to talk. However, don't hesitate to ask your customer to repeat anything you don't understand. You, in turn, should repeat important information that they give you, such as numbers, spelling of words, important names, cities, and streets.

Listen for the caller's mood to try to determine not only what they are saying, but how they feel about it. Remember the importance of asking questions until you are sure that you understand the problem or have as much information as possible.

Your Format for Closing

If necessary, summarize the main ideas of your call by confirming details discussed or follow-up actions promised. Rather than just saying, "Goodbye," try to close with a friendly, courteous phrase such as:

- "Is there anything else I can do for you?"
- "It was nice talking to you."
- "Thank you for calling."
- "Thanks for your help."

Handling Everyday Requests

There are some situations to keep in mind that can influence how the call goes:

- The person they want isn't there.
- You have to transfer a call.
- You have to put a caller on hold, get information, and return to the line.
- You have to take a message.

Transferring Telephone Calls

An impression of poor service and lack of interest often results when calls are transferred improperly within an organization. A call should only be transferred when the person transferring it cannot help the caller, and is reasonably sure the person to whom the call is transferred will be able to help the caller.

The reason for the transfer should be explained, along with the name of the person to whom the caller will be transferred. This prepares the caller for what is about to happen, and doesn't look like you are giving them the run-around. This is known as a **warm transfer**.

Here's an example: "Mark Jenson in Fire Prevention handles that. I'll transfer you to him, Mrs. Smith, if you'll just hold the line."

Then the person transferring the call should announce the call to the person receiving it. This will prepare him and eliminates the need for the caller to repeat information.

Putting Callers on Hold

If you are handling a call and you must put the caller on hold, ask their permission and explain why you are putting them on hold. You should also give them your best estimate of how long they will be on hold. Remember that you are asking permission and not making a statement; if they don't want to be put on hold, you need to keep the call open.

If you think the waiting time might be more than three minutes, give the caller the option of holding or having you call back. Waiting time always seems longer than it actually is.

Progress Reports

A progress report means informing the waiting person what progress is being made on the call. Here's an example: "Mr. Johnson, I'm still checking the code for that. Do you mind waiting a little longer, or should I call you back?"

Proper Return to the Line

Attract the person's attention by thanking them for waiting and using their name or a suitable expression. Example: "Thank you for holding, Mr. Leonard. I have the information that you were asking for."

Taking a Message

Taking a message for your supervisor or another employee should be relatively simple. However, a great deal of business is lost each year by incomplete or forgotten messages. A courteous person returns telephone calls, but only if they get the correct message.

Taking Messages Accurately and Completely

- Keep a notepad handy.
- Write while you are on the line. Take notes as you handle the call, not after you hang up the receiver.
- Request, rather than demand, information. Consider the value in saying, "May I have your name, please..." rather than the more common but very curt, "What is your name and number?"
- Verify spelling.
- Get the person's first name, too.
- Spell names out phonetically if they are difficult.
- Give feedback for verification. (For example, "So that's spelled J-a-y-s-o-n?")

What to Record

- To whom: The name of the person called.
- From whom: The name of the call and his business connection.
- Where: The caller's telephone number and extension number.
- What: The message itself.

- Why: Action requested and the action promised.
- By whom: Name of the person who recorded the message.
- When: Date and hour of the call.

Other Tips

To ensure the accuracy and completeness of a message, consider the following suggestions:

- Listen attentively to the message.
- Check to be sure all telephone numbers are correct and use feedback for verification.
- Verify the spelling of difficult names using phonetic helpers.
- After the telephone call has been completed, make additional notes from memory.
- Attach any useful papers, reports, or lists of information to the message.

When asking to take a message, if the caller says, “No, I’ll call back,” courteously ask one more time. For example you could say, “If I could just tell him who called, I’m sure he will be interested. Of course, you can call back if that would be more convenient.”

Tips and Tricks

Do’s and Don’t’s

Do Say...	Don’t Say...
He's not in his office at the moment.	He hasn't come in yet.
She's away from her desk at the moment.	She's on her coffee break.
He's out of the office until tomorrow.	He left early today.
She's not in the office today.	She's sick today.
He's out of the office for the next two weeks.	He's on vacation for the next two weeks.

Phrases to Avoid Using

- “I believe he went to the men’s room.”
- “He’s taking a nap right now.” (This actually happened. The man had had a heart attack and his physician ordered him to rest 45 minutes after lunch each day, but this information should not be known to the caller.)
- “She has a doctor’s appointment this afternoon.”
- “He’s at the bank.”

Sentences That Damage Your Image or Lose Goodwill

- “I can’t put your call through unless I can say who is calling.”
- “I don’t have anything to do with your problem.”

- “He’s busy. Would you call him back?”
- “I’m working with someone right now. Could you call back?”
- “There’s nothing I can do about it – that’s our policy.”
- “We might have it but I don’t know for sure.”
- “We’re getting ready to go home. Would you call back in the morning?”
- “I just came in. Could you call back in about 15 minutes?”

Remembering and using these telephone techniques will enable you to give the same exceptional service on the telephone as you would give your customers and clients in person.

Further Reading:

- ✓ *Telephone Installation Handbook, 2001, By Stephen Roberts*
- ✓ *Top Telephone Techniques, 2003, By Ellen Bendremer*