

# Telephone Techniques That Support Quality Customer Service

Sacramento City Unified School District • Human Resource Services





# The Phone Rings . . . You Answer

- Good communication skills are the very heart of a company, organization, or school district. You, the person answering the phone, can leave a lasting impression on the various publics we serve.
- Who is the public? Internal and external guests, school sites, district departments, employees, staff, administrators, principals, students, parents, volunteers, School Office Managers, and community members to name a few.
- In one day, think of the variety of people from all walks of life we deal with. How well do you represent the school district each time you pick up the phone?



## The Phone Rings . . . You Answer (continued)

- Phones, voice mail, call forwarding, email, faxing, and all of the other innovative forms of communications have drastically changed the way we deal with everyday office procedures.
- The challenge in today's office is dealing with the public in an effective manner.
- Each caller should feel valued with a sense of mutual respect and a commitment of follow through with their inquiry.



# Answer Promptly and Smile

- Smile . . . It can be heard in your voice. Putting a smile on your face before you lift the receiver is an excellent habit to develop. Friendliness in your voice, along with the way you greet a caller, has a great deal of impact.
- As you pick up the phone, pick up a pencil to take a message/note.



# Identify Your Department, Identify Yourself

- Proper identification eliminates guesswork and time. Identify both your department and your name. "Personnel Office, Miss Jones."  
"Personnel Services, Mary speaking."  
"Personnel Services, this is Mary."
- Don't say your colleague isn't in yet (at 10:00 a.m.), or gone for the day (at 3:00 p.m.).
- You can say: "I'm sorry, she is away from the office," or "I'm sorry, she is in a meeting (away from her office)." "I would be happy to take a message."



# Project a Positive Telephone Image

- School districts are just like businesses and should project a professional image.
- Use businesslike phrases instead of slang. Say “yes,” “certainly,” and “of course” instead of “okay.”
- Avoid technical or educational terms or acronyms that could confuse the caller.
- Don’t make side comments and discussions with others while a person is on the line. Be attentive and considerate to the caller.
- Show you are interested by using the caller’s name, if known.





## Project a Positive Telephone Image (continued)

- Give yourself a little space between calls in case someone is trying to reach you if you are returning calls.
- Follow through with research for positive closure.
- Treat your co-workers with the same courtesy your customers receive.
- Your voice says it all. Vary the tone of your voice. Be careful not to speak too loudly or too softly.
- Voice says more than you think: quiet/timid = lack of confidence; snappy = irritation/annoyance; friendly = sincere



# That Wonderful Hold Button . . . Oh, How It's Dreaded

- No one likes to be placed on hold, but a quick explanation does wonders to soothe the savage . . . Examples:  
“I’m on another call, may I put you on hold?”  
“I’m with someone at my desk, may I put you on hold or call you back?”
- Always use the hold button. It is unprofessional to lay the phone on your desk, even to retrieve information close at hand.
- Always thank the caller for waiting.





## That Wonderful Hold Button . . . Oh, How It's Dreaded (continued)

- If you must place someone on hold for a lengthy time, go back every 45 seconds or so and acknowledge that you will be with the caller as soon as possible. (Especially true if the caller is waiting to speak to another person in your office. Don't let the caller feel abandoned.)



## When the Phones All Ring at Once . . . Where is Voice Mail Now?

- Remain calm. Let your first caller know your other lines are ringing. "Excuse me for a moment, my two other lines are ringing. Let me put them on hold."
- Quickly answer the second line and identify your department, "I have other lines ringing. Can you hold please?"
- Answer the third line and say, "I have two calls on hold ahead of you, would you care to hold?"
- Tell caller two you will be back shortly and return to line one.



# The Caller Believes in You . . . Don't Let the Caller Get Lost

- Transfer calls only if you are sure that the office is the correct one for the call.
- Allow the caller to give you enough information to proceed. For example, a caller asking for a permit could need:
  - A permit for a child to attend another school (9435).
  - A permit to use a school building (7449).
  - A permit to distribute flyers (9040).
- Always give the caller the number, including prefix, before transferring the call.
- If you are unsure who should receive the call, take the name and number so you can find out and call back.



# Please Hold One Moment While I Transfer Your Call

- There are two ways to transfer calls. If you do not want to speak to anyone in the office, but simply want to connect the caller:
  - Press the Transfer button, and enter the last four digits of the district phone number.
  - Listen for the ring, and then press the Connect button. Hang up.



## Please Hold One Moment While I Transfer Your Call (continued)

- If you transfer a call to another office and wish to relay information about the call, take these easy steps.
  - Press the Transfer button, and enter the last four digits of the district phone number.
  - Wait for the office to answer, relay your information, and then press the Connect button so all three of you are connected.
  - Say “go ahead please.” Wait until you hear they are connected and then hang up.



## Do You Know How to Accept a Transferred Call?

- Many people do not know how to receive a transferred call—the kind of call where someone says, “I’m transferring so-and-so to you.”
- Remember one thing: When you answered the phone you identified your name and department, and the person transferring the call to you heard you. The caller, however, has been in “hold-limbo” and didn’t hear a thing.
- When the call is transferred and hopefully someone says, “Go ahead, please,” the first thing the caller should hear you say is, “Personnel Services, Mary Jones speaking.”





## Doesn't Anybody Know Anything?

- Angry callers can be dealt with successfully in several ways.
  - Never, never get defensive. It aggravates the situation.
  - Keep your voice calm.
  - Write down notes as the caller speaks. It allows the caller to vent, and it aids you in listening rather than thinking of a retort.
  - Assure the caller that you will share their inquiry/concern with appropriate staff person for return call/follow-up.



## What, I'm Being Transferred Again!!!

- Transfer the angry caller with care. Explain who you are transferring the call to and why. Stay on the line when you transfer the call and briefly explain the caller's concern.
- Sometimes transferring is not the answer. It may be better to take the caller's name and number, review your notes with the caller for accuracy, and promise to deliver the message to the correct office so he or she may get a return call.



# What, I'm Being Transferred Again!!!

(continued)

- Additional suggestions:
  - Keep your voice at a low level, but speak with confidence.
  - If a caller uses offensive language, try to ignore it. The caller will eventually stop venting, and then you may say, "I'm here to assist you with this situation. I will do my very best for you."
  - Try not to disrupt the caller that is venting. Listen, stay calm, and offer assistance.



## Voice Mail . . . Smile When You Say That

- Smile when you record. It does make a difference.
- Write down your message, rehearse it several times, so you don't sound as if you are reading it.
- Vary your tone—it's very easy to record in a monotone.
- Keep your message short.
- Return all phone calls within 24 hours.



## The Last Word . . . In Summary

- Smile when you pick up the phone and identify yourself and your department.
- Remember that you represent the Sacramento City Unified School District every time you answer.
- Make each guest feel welcomed, valued, respected.
- Take quality notes, research, and follow-up with positive closure.
- Commit to a sense of personal ownership to the caller's inquiry, and make each contact a shared accomplishment to each other.

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