

## Telephone Etiquette Tutorial

The following is a guideline to utilize while processing inbound and outbound calls:

### Get a notepad and a pen

- Pick up the phone
- Greet the caller by saying:
- “<Your Area> <Your Position>, this is (name), How may I help you?”
- LISTEN to your caller and repeat caller’s name
- Verify reason for call, “What is your call in reference to?”

### If the caller needs to be connected to someone in our department:

- Tell the caller you will CONNECT them
- Place caller on hold by pressing TRANSFER OR CONNECT
- Dial the desired extension
- WAIT for the party to answer and inform them of:
  - WHO you have on the phone and WHAT they are calling about
  - Then connect them by pressing the Tab that says Yes

### If the party DOES NOT ANSWER or they wish to ignore the call, and you get their voicemail

- Get back on the line with the caller by pressing Cancel
- Inform them in the following way: “(Caller), (Recipient) is unavailable. Would you like to leave a message or would you like to be connected you to their voice mail?”
- If they would like to leave a message, by hand:
  - Write down the name of the caller & their number
  - Write down exactly what they need in the message on your notepad.
  - Note the time & date they called.
  - Then go to your outlook to email the correct person you took a message for.