

# Phone Etiquette

LESSON  
#9

## Study Guide



**Business**

**Soft Skills**

**Career Enhancement**

**A Business Soft Skills lesson  
for your career enhancement**



Level One / 2.0

## ***“Business SoftSkills Career Enhancement Study Guide”***

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## Lesson #9      “Phone Etiquette”

### LESSON #9 “PHONE ETIQUETTE”

The first and only contact a person may have with you is over the phone, and that impression will stay with the caller *long* after the call is completed. Proper etiquette leaves callers with a FAVORABLE impression of you, your department, and the company. This lesson will reveal the eight rules to professional Phone Etiquette. You will find that others are treating you with more *respect* when you use proper phone etiquette.

<b>Video Lesson Timing</b>															
VIDEO	Entire Lesson	Open	Intro	CHAPTERS									Exercise	Review & Quiz	Summary
				1	2	3	4	5	6	7	8	9			
Phone Etiquette	19:39:00		1:24	2:14	2:38	2:03	1:30	1:25	2:46					3:29	2:06

### Script

**[“As Spoken” script - not edited for grammar]**

#### **OPENING**

Hello! My name is Kathleen Stelts and this soft skill lesson is on Business Phone Etiquette. Why don't I meet you downstairs and we can get started.

#### **INTRO**

Hello again! In this age of text messaging, email and instant messaging, the telephone is still a very important form of business communication. Although telephone usage in business today is routine, poor etiquette can put you at a REAL disadvantage whether

## Lesson #9 “Phone Etiquette”

you are answering phones or making calls. Using the proper etiquette is a MUST in order to maintain a certain level of professionalism.

The first and only contact a person may have with you is over the phone, and that impression will stay with the caller LONG after the call is completed. Proper etiquette leaves callers with a FAVORABLE impression of you, your department, and the company. You'll also find that others are treating you with more RESPECT and are willing to go out of their way when you use proper phone etiquette.

So let's look into Business Phone Etiquette.

### CHAPTER 1

Rule number one: Smile and be friendly. It is a well known fact that a smile changes the tone of your voice. This, in turn, is communicated over the phone. It is important to remember to sound upbeat and positive whenever you are on the phone. So before you answer the phone or start talking to someone, take a deep breath and smile. It's so important that some sales departments have mirrors right next to the phone to remind you to smile. Try it, it works!

Always ask the caller for their name. This shows you have taken an interest in them and their situation. Then make sure you use their name during the conversation.

If you reach a wrong number, don't demand to know their number or argue with the person. Simply say: "I'm sorry, I must have the wrong number. Please excuse the interruption." and then hang up. If you call and get the same party a second time, tell them the name and number you are trying to contact. You probably have an incorrect number, apologize, and hang up. If you receive a call for another person or department, be courteous and find out where and whom they should contact. They will appreciate your professionalism.

Always identify yourself, even when calling business friends because they may not recognize your voice right away. Also, if you told a person you would call at a certain time, call them when you promised. If you need to delay the conversation, call to postpone it, but never make the other person wait for your call.

Remember, always state the purpose of your call. People make business phone calls for specific reasons. Very rarely do vendors, customers or clients call just to chat.

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Telephone calls usually lead to some action that needs to be taken. Make sure your first impression is a good one by answering the phone as pleasantly and professionally as possible.

### CHAPTER 2

Rule number two: Always identify yourself. People need to know they have reached the correct person. A good way to answer your business phone is like this: “Thank you for calling Business SoftSkills This is Kathleen Stelts. How may I help you?”

Also, always try to answer the phone on the second ring. Answering a phone too fast can catch the caller off guard and waiting too long can make the caller frustrated because they have to wait.

If you are calling someone and get their voice mail make sure to always speak CLEARLY and SLOWLY and be sure to leave your name and number.

It's best to say it at the beginning and repeat it at the end of your message ESPECIALLY when you are giving your phone number.

The biggest complaint business people have with voice mail messages is they have to play the messages back numerous times in order to understand it.

Always speak CLEARLY and SLOWLY! Remember to keep messages short and to the point. Don't forget to leave the date and time you called and always let the person know the best time to call you back. You should only cover one topic per message.

Give the voice mail recipient all the information they will need in order to assist you.

Now, let's also talk about setting up YOUR voice mail. Always record your own personal greeting; never use the standard default greeting that may be on your system. If a male voice says that "Kathleen Stelts is not available," it may confuse the caller. Include in your greeting, your name and department so that people know they have reached the correct person. You should always include your normal working hours and time zone. If you are going to be out of the office for vacation or just part of the day, record another greeting to let callers know this.

Include in this message a time and date you are returning and another person in the organization the caller may contact for assistance. And when you get a call, ALWAYS respond within 24 hours. Voicemail has many benefits and advantages when used

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properly. But, you should never hide behind voicemail. If callers continually reach your voicemail instead of YOU they will think you are avoiding calls and will get angry and frustrated even BEFORE you talk to them.

### CHAPTER 3

Be articulate is rule number three. Never talk with anything in your mouth such as chewing gum.

When on the phone, LOWER your voice if it is normally loud. On the other hand, if you have a soft voice, keep the phone two finger-widths from your mouth and speak clearly.

Before picking up the phone, discontinue any other activity that may be heard by the calling party such as talking to others, eating, chewing or typing. Remember to speak slowly, in a pleasant tone of voice and carefully articulate your words. Also, cover the mouth piece if you cough or sneeze.

If your job requires being on the phone most of the day, remember it usually takes a few hours for the vocal cords to warm up after a night's sleep. Practice enunciation while you are getting ready for work, or do voice exercises. Deep breathing exercises will gently clear your throat and help to condition your voice for a long day of conversations.

### CASE STUDY #243

*Now, let's take a look at a case study on poor phone etiquette.*

*The president of a small distribution firm had noticed that sales had been below average for the last couple of months. So, he took a trip with his staff to help increase sales.*

*When he was on the road, he called in to talk to his office manager. After getting a very grumpy greeting from the new receptionist, he was promptly put on hold and after 5 minutes was cut off.*

*After several similar situations during the trip, he realized that some of their sales problems were related to the lack of telephone etiquette and professionalism from the company's receptionist. By correcting this problem, sales began to rise. As you can see, poor business phone etiquette can cause significant problems.*



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### CHAPTER 4

Rule number four: Listen closely to your caller. Professional business people dislike continually repeating themselves and you want to leave them with a good impression. If you are having trouble hearing the other party, ask them to speak up or repeat what they said.

Never “guess” at what they are saying. Conversely, if you notice pause by the other party, they may be having difficulty hearing you. Ask if they can hear you clearly, bring the receiver closer to your mouth or, if possible, raise the volume on your phone.

Another area of phone etiquette is the use of the speaker phone also known as a “Squawk Box.” Never make calls with your speaker phone. Everyone can tell when you have them on speaker phone and the increased background noise and decreased ability to hear the conversation upsets most people. Using a speaker phone can give the impression that they are not important enough to get your undivided attention. The only legitimate time to use a speaker phone is when several people are present and joining in the conversation. When you place a call of this type, immediately identify everyone in the room to the party you are calling. By following these simple rules, everyone will feel comfortable and at ease on speaker phones.

### CHAPTER 5

Rule number five: Help resolve problems - Business phone calls are usually made in order to solve problems or answer questions even if it's only forwarding the call to the proper person. You must always help the other party as much as you can. Resolving problems over the phone will help you earn a reputation of being competent and professional. You may have to take their information and call them back with the remedy.

When taking a phone message always be sure to get the following information:

the proper spelling of the caller's name and company, phone number with extension if needed, the time and date of call, what the call is regarding and the best time to return calls.

If during a call, you have to place someone on hold, first ask “May I put you on hold for a moment while I look that up?” And remember to wait for the caller's answer. If it takes you more than a couple of minutes, pick up the line and let the caller know you are still working on finding a solution.



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If you must transfer them, be sure to explain to the caller where you are transferring them and why.

Give the name or department and extension you are transferring them to so if you ARE disconnected, they can call back to the correct party.

### CHAPTER 6

The sixth and final rule is: End calls properly before you end a call. Ask, “Is there anything else I can help you with today?” If it's appropriate, recap any actions that need to be taken and the time frame in which to do them. Always end with a pleasantry such as "have a nice day" or "It was nice talking with you." It's important to give a good last impression and end conversations gracefully. You may have to end a long phone call without sounding rude and there are several ways to do this. You can promise to finish your discussion at another time, or just tell the person how much you've enjoyed speaking with them and that you have to go.

Whatever you do, always end on an UP note. When you're honest and polite with the other party, you will have completed your call properly. When a customer or client thanks you, reply “It's my pleasure.” or “You're welcome.”

Never ignore a compliment or put it down by saying something like, “It's my job, I have to do it.” This will make the other party think that their compliment was not worth much. And in business today, accept EVERY compliment you can get!

Now let's take a minute to talk about the use of business cell phones. Whatever you do with your OWN cell phone is your business, but when you have a business cell phone always follow these guidelines: Never use pop music or offensive sound effects for the ringer on your business cell phone. Stick to the standard ring tones that are acceptable to everyone. When using your cell phone do not speak louder than any other phone.

Cell phones now-a-days are sensitive enough that you do not have to yell. Speaking too loudly will annoy other people around you. If you go into a meeting, turn off your phone. If you have to take a call during the meeting, put it on vibrate and inform the meeting coordinator before the start of the meeting. When you get the call, leave the room before you answer.

If you must use your business cell phone while you are driving your car, make certain you use a hands free device. Keep the conversation short. Explain to callers that

## Lesson #9      *“Phone Etiquette”*

you're in the car, so they can anticipate distractions or possible disconnections. If it's going to be a long call or if you have to take notes, pull over. According to the latest studies, cell phone usage in the car may increase accidents, even when using hands free devices.

Now, it's time to get a pen and paper out. We're going to see a review and then have a quiz on 'Business Phone Etiquette.' Occasionally you will see a slide with a missing word or multiple choice question. You will have eight seconds to write the answer before it appears on the screen. Ready? OK, good luck, here we go into the Review and Quiz portion of Business Phone Etiquette.

## Lesson #9 “Phone Etiquette”

### Review and Quiz

Questions in **BOLD** answers underlined

- Telephones are still important  
to business communication
- Proper etiquette creates  
professionalism
- Your only contact may be  
over the phone

Rule #1

Smile And

Be Friendly

- Always ask the caller for  
their name
- State the purpose of your call
- Answer calls pleasantly  
and professionally

## Lesson #9 “Phone Etiquette”

If you reach a wrong number you should:

- a) Demand to know their number
- b) Argue with the person
- c) Say "I'm sorry, I have the wrong number  
Please excuse the interruption"
- d) Don't say anything and hang up

Rule #2

Always Identify Yourself

- Speak CLEARLY and  
SLOWLY
- Never hide behind voicemail

Rule #3

Be Articulate

- Never talk with anything  
in your mouth
- Lower your voice if

## Lesson #9 “Phone Etiquette”

normally loud

- Cover the mouth piece  
if you cough or sneeze

**Answer the phone on the second ring**

Rule #4

Listen Closely

To Your Caller

- Only use “speaker-phones”  
when several people are involved

Rule #5

Help Resolve Problems

- Always help as much as you can
- Get all the information  
when taking messages
- Ask if it is ok to place caller  
on “hold”

**Never “guess” at what was said**

## Lesson #9 “Phone Etiquette”

### Rule #6

#### End Calls Properly

- Ask, “Can I be of further help today?”
- Recap actions to be taken  
and time frame
- Always end with a pleasantry

#### Business Cell Phones Rules

- Never use pop music or  
offensive sound effects  
for the ringer
- Do not speak too loudly
- Turn off your phone  
during meetings
- Use “hands free” devices in the car

#### Which statement is NOT correct?

- a) End every conversation as soon as possible
- b) Always end on an UP note
- c) Accept compliments

## Lesson #9      *“Phone Etiquette”*

- Your phone demeanor  
defines your reputation
- Learn these rules
- You will sound professional  
and competent over the phone



## Lesson #9      *“Phone Etiquette”*

### **SUMMARY**

It's easy to become lax about phone etiquette. Workplace distractions, demanding schedules or just laziness can attribute to this. But it is important to realize that a phone conversation carries just as much weight as a face-to-face meeting. Your phone demeanor becomes part of your reputation.

Learn these rules and use them until they become a part of your every day activities. You will then sound professional and competent over the phone. This and other business soft skills will build a strong foundation for your career enhancement.

Good luck, and thank you for watching!

## Lesson #9 "Phone Etiquette"

### Lesson #9 "Phone Etiquette" Test

#### True or False

1. The business telephone is now obsolete .....T or F
2. You should "text message" customers instead of calling them over a phone ....T or F
3. You will be given more respect if you use Business Phone Etiquette rules .....T or F
4. A "smile" can NEVER be communicated over the phone.....T or F
5. People should be able to recognize your voice when you call them .....T or F
6. Speaking quickly over the phone allows you to get more work done .....T or F
7. Before you pick up the phone, stop chewing or typing .....T or F
8. You can hide behind your voice mail ONLY if you are having a bad day .....T or F
9. A receptionist with poor business phone etiquette may affect sales .....T or F

## Lesson #9 "Phone Etiquette"

10. You should keep people on "hold" as often as you can .....T or F
11. When you use speaker phones, people think you are important .....T or F
12. Business cell phone ring tones should be fun with pop music or wild sound effects .....T or F
13. You need to speak loudly into cell phones .....T or F
14. Never answer your cell phone during business meetings .....T or F
15. Always use "hands free" cell phone devices when driving .....T or F
16. Poor business phone etiquette can affect your reputation .....T or F
17. Solving problems over the phone will NOT help your reputation .....T or F
18. Never "guess" at what people are saying over the phone .....T or F
19. Always end a call with a pleasantry like "Have a good day." .....T or F
20. Never let the other party know that you are calling from a car .....T or F

## Lesson #9      *“Phone Etiquette”*

### Answers

1. The business telephone is now obsolete

**FALSE**

2. You should “text message” customers instead of calling them over a phone

**FALSE**

3. You will be given more respect if you use Business Phone Etiquette rules

**TRUE**

4. A “smile” can NEVER be communicated over the phone

**FALSE**

5. People should be able to recognize your voice when you call them

**FALSE**

6. Speaking quickly over the phone allows you to get more work done

**FALSE**

7. Before you pick up the phone, stop chewing or typing

**TRUE**

8. You can hide behind your voice mail ONLY if you are having a bad day

**FALSE**

9. A receptionist with poor business phone etiquette may affect sales

**TRUE**

## Lesson #9      *“Phone Etiquette”*

10. You should keep people on “hold” as often as you can

**FALSE**

11. When you use speaker phones, people think you are important

**FALSE**

12. Business cell phone ring tones should be fun with pop music or wild sound effects

**FALSE**

13. You need to speak loudly into cell phones

**FALSE**

14. Never answer your cell phone during business meetings

**TRUE**

15. Always use “hands free” cell phone devices when driving

**TRUE**

16. Poor business phone etiquette can affect your reputation

**TRUE**

17. Solving problems over the phone will NOT help your reputation

**FALSE**

18. Never “guess” at what people are saying over the phone

**TRUE**

19. Always end a call with a pleasantry like “Have a good day.”

**TRUE**

20. Never let the other party know that you are calling from a car

**FALSE**

**Lesson #9      “Phone Etiquette”**

**QUICK REFERENCE CARD**

[See next page]

The Quick Reference Cards for this lesson are located on the next page. These cards provide the rules and key points of this lesson.

The Quick Reference pages can be printed on a heavy card stock then cut into individual cards for easy access. They can also be printed in the 8 ½ x 11 format and laminated or put into a notebook .

Use them whenever you need a quick referral to key points of this lesson.

**Six rules of  
proper telephone  
etiquette**

**Phone Etiquette**

**Lesson 9** Level One

1. Smile and be friendly when on the phone
2. Always identify yourself and try to answer on the second ring
3. Be articulate

**Six rules of  
proper telephone  
etiquette**

**Phone Etiquette**

**Lesson 9** Level One

4. Listen closely to your caller
5. Help resolve problems
6. End calls properly and follow cell phone etiquette and safety rules