

Phone Etiquette Do's

- **Answering the phone properly, professionally and promptly is a important part of growing your business and retaining customers.**
- **When answering the phone please use the following greeting. “Thank you for calling Jackson Hewitt my name is _____. How can I help you today?”**
- **Always try to solve the customers questions or concerns without transferring them. Most issues can be resolved for the customer with one call by you and we want to strive to meet this expectation every call.**
- **If you must return the customers call make sure clear expectations are set with the customer. Set a time, date and contact number before you hang up with the customer. Once these are set make sure to follow thru with your promise and to return the customer's call on the time, date and contact number promised.**
- **Answer the phone by the fourth ring.**
- **Listen to and respond to all Voicemails before close of business each day.**

Phone Etiquette Dont's

- **Put the phone on DND or Do Not Disturb.**
- **Turn the ringer off.**
- **Tell a customer you are unable to solve their issue. Instead tell them you or the person responsible will call them back with a resolution before close of business that day (Or a pre-agreed upon date, time and contact number if more than 24 hours).**
- **Forget to follow up and return calls. Keep a notepad by the phone, if you make a promise write it down and cross it off once it has been met for the customer.**
- **Not answering the phone because the office is busy.**