Telephone Etiquette

Answering the Phone

Your supervisor or department may have specific guidelines for answering the phone. The guidelines below are not intended to replace specific policies, but represent reasonable telephone etiquette if specific instructions are not otherwise provided. Remember, each phone call could be the caller's first, or most important, impression of Furman.

Always try to answer the phone by the third ring.

Answer the phone by identifying yourself and the department or area where you work. For example:

"Hello, Computing and Information Services, this is Nancy. May I help you?"

If you are answering a phone where many outside calls are received, you should include "Furman" in your greeting. As an example,

"Hello, Furman University Personnel, this is Nancy. May I help you?"

Speak clearly.

Be sure your voice mail box is up to date. Listen to both your internal and external greeting to be sure your words are clear and that a smile can be heard in your voice.

Refrain from chewing gum, eating or drinking when answering the telephone.

Transferring Calls

Transfer callers only after you listen and determine the caller's question or intent. Once you know what the caller is calling about, transfer only if you are sure you cannot assist the caller and you are reasonably certain that the person to whom you are transferring the call can assist.

Provide an explanation of why you are transferring the call and the name of the individual or department where the call will be transferred. Avoid abrupt expressions such as "Just a minute" or "Hold on."

Always offer the caller the phone number and name of the person to whom you are transferring the call. Stay on the line until someone answers whenever possible to provide a smooth transition for the caller.

When callers are faced with urgent needs, be sure to provide some option to speak to someone in person. Transferring a frantic parent to a voice mail box will only frustrate the caller.
If the caller seems annoyed at the prospect of being transferred, offer a callback. The caller may have already been transferred several times or may have initiated the call to someone unable to assist.

Transferring Calls to a Voice Mail Box

If you pick up a call for someone else, or if you are answering a departmental phone, you may offer to transfer the caller requesting a specific individual to the appropriate voice mail box. You may also offer to transfer the caller to a specific voice mail box if you know that only a specific individual may assist the caller, and that individual is away from the office. Send a call to the appropriate mail box by transferring the call to the appropriate extension, or, if you have picked up that extension or it has rolled to you, transfer to voice mail using express messaging (transfer - 3233- 4-digit extension - # - transfer.) Detailed instructions for transferring a call may be found in the preceding section of this database.

Placing Calls on Hold
Provide an explanation of why you are placing the call on hold. As for the caller’s consent to be placed on hold if at all possible. Use the call holding feature of your telephone. Never leave a handset off the hook while a caller is holding.

Provide a progress report to the caller every 45-60 seconds if possible. Furman University does not have music or other background sound to let the caller know the call has not been disconnected. When you have the information needed to return to the call, begin by referring to the caller by name and thanking him/her for waiting.

Answering A Coworker’s Phone
When secretaries or administrative assistants answer the telephone for their supervisors, the supervisor will have specific instructions as to how to handle incoming calls. The following guidelines apply specifically to situations where you may be called upon to answer the phone of a coworker.

Identify both yourself and the person for whom you are answering the call. For example, "Hello, Linda Free’s office, this is Debbie - may I help you?" Do not make promises about callbacks or any other action on the part of the person for whom you are answering. Do promise to be sure the person gets a message, or offer to transfer the call to the person’s voice mail box.

Use discretion when explaining the situation to callers. Avoid addressing irrelevant or personal matters such as "He’s still at lunch" or "She went to the bathroom." Appropriate responses are: "He’s away from his office right now..."; "She has someone with her..."; "He is in a meeting..."; "She is on the telephone...." Avoid sharing unneeded details with callers, such as what type of meeting, or with whom someone may be on the phone.

If possible, find out in advance about the call screening preferences of the person for whom you will be answering the phone. And be thinking about what a caller should be told and how calls should be handled if someone must answer your phone.

Be sure to get the caller’s name, but do so tactfully. Avoid "Who’s this?" or "What is your name?" or "And you re......?" A more polite inquiry would be "May I tell her who called?"

Assist the caller if you can. If you are answering the phone for a coworker, you may be able to complete the caller’s request yourself.

Taking Messages
If you are answering the phone for someone else, be prepared to take a message. Offer to take a message or to transfer the caller to the voice mail box of the person for whom you are answering. Information will not be lost in the translation if callers are transferred to voice mail; however, some callers are not amenable to speaking to the automated system.
If you do take a message, repeat important information back to the caller to certify its accuracy. Record these details for each call for which you take a message:

- Date and time of call
- Caller’s name (with spelling verified if in doubt)
- A specific message
- A note about the relative urgency or importance of the call
- Deliver the message promptly. If the person for whom you took the message will be checking voice mail, one way to make certain that the message is delivered is to deliver the details of the message yourself to the appropriate voice mail box.

**Using Your Voice Effectively**

The important elements of nonverbal communication, such as facial expression and body language, are not available when talking on the telephone. Because of this, clear communication over the telephone requires additional effort on your part.

**Volume**

Do not speak too softly or too forcefully. Speak clearly and articulate your words carefully. Be attentive to keeping the handset an appropriate distance from your mouth so that your words do not sound distant (if the handset is too far away) or muffled (if you are speaking closer than 1-1½ inches from the mouthpiece.)

**Rate of Speech**

Speak somewhat more slowly than you would in person to give the caller an opportunity to interpret your words. Particularly if you must leave a voice message, enunciate your name, and important information such as phone numbers very carefully.

**Tone**

The caller should detect enthusiasm and energy from your tone of voice. Put a smile in your voice when you answer the phone. You can do this by putting a smile on your face when you answer. Your voice will be more interesting to the caller if your vocal expression is varied in quality, with both high and low tones appropriate for the nature of the conversation.

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This material prepared for use by the Furman University community by
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