

Phone Calls: Welcoming Tips and Scripts

A phone call is often a person's first interaction with our service. This call offers an excellent opportunity to establish rapport and can set a positive tone for the rest of that person's experience. For this to happen, it is everyone's responsibility to make callers feel welcome with a friendly greeting and an earnest effort to listen and assist.

Below are a few ways you can please people on the phone when both receiving and making calls.

Be efficient

Staff should be able to perform basic telephone functions well, such as transferring calls and putting calls on hold. Staff should try to answer the phone by the third ring, because a slow response can discourage callers. Notepaper should be kept close to all phones.

Use a welcoming and professional tone

Get into a positive frame of mind and smile before you pick up the phone. Treat every call with a warm and positive attitude.

Answer the phone professionally with a friendly standardized greeting, letting the caller know which service they have reached:

Good {morning/afternoon/evening}.
Thank you for calling {Program/Department Name}.
**My name is { }.
How can I help you?**

Keep the caller's needs in mind

Try to listen attentively with your whole mind on the caller. Allow the caller enough time to speak. Remember, the caller may be very anxious and it may take a little while for them to communicate their needs.

Pausing slightly between words or phrases can help the other person hear what is being said. You can express warmth by using the caller's name but do not overdo it: repeating the caller's name over and over throughout the conversation can be annoying.

If necessary, help the caller to stay focused using gentle prompts. Take notes to help you remember what the caller said. Confirm understanding by summarizing the caller's request or question.

Keep the caller informed. Let them know what you are doing. For example, if you are looking for appointment times in the calendar, tell the caller that's what you are doing.

If you need to consult someone else in the office, ask for permission to put the caller on hold. If a caller is on hold for a long time, update them periodically. Always thank the caller for holding when you return to the call.

Keep the conversation positive and evoke confidence in your program

Give positive verbal nods to let the caller know you are listening. For example: "Sure," "No problem," "I see," "I understand".

Use positive, definite language and words like "happy," "good," "best" and so on. "Does that sound good?" is much better than "Is that OK?"

The more positive words we use, the better the impression your caller will get. Equally, more definite language such as "straight away" or "certainly" will also build confidence in your program and organization.

If you have to say something that may be considered negative, try to finish with a positive option: "We don't have an appointment for that day; could I suggest the following week?" Suggest that the caller do something, rather than giving direct orders. Here are some useful "suggestion" phrases:

- "Could you please send in..."
- "It would be great if you could..."
- "It is important that we get..."

Dealing with callers who are upset

Think about the tone, pace, and volume of your voice. When callers are angry, agitated or distressed, try to ensure that your voice does not mirror theirs. It is always best to remain calm and clear. Reacting in this way can often promote the caller to calm down too.

A good way to deal with irate people is to remember the acronym **LAST**:

- **L**isten
- **A**cknowledge how the person is feeling
- **S**olve the problem
- **T**hank the person

Sometimes, you may have to apologize on behalf of the larger system.

End the call efficiently and leave a good last impression

- Confirm all meetings, arrangements and agreements at the end of the call to avoid misunderstandings. It can be useful to have the caller repeat the day and time of an appointment.
- Tell the person anything they need to prepare for their visit (such as arrival time and what they should bring along).
- Give the caller a cancellation number and ask them to call if they are unable to attend the appointment.
- Have a warm, positive close. People remember the first and the last impressions on the telephone.
- Thank the person for calling and see if there is anything else that you can help with.
- Carry out any actions required from the phone call and record any notes or arrangements as quickly as possible.

Creating phone scripts

You can help to ensure consistent exceptional service by developing a phone script that team members can follow and use as a guideline. A script can be very simple or complex, depending on your needs.

To develop an effective telephone script, you must know:

- The reasons that people are calling
- The desired direction that calls should take
- Common questions or issues that arise related to each call

A script can help staff feel that they are meeting expectations, but it is a guideline only. Scripts can help with specific scenarios, but all staff must be able to deviate from the script and respond to situations appropriately.

Here are some helpful phrases to include in phone scripts:

- “Good morning/afternoon, thank you for calling [program or department name]. My name is [name]. How can I help you?”
 - “No problem.”
 - “I understand.”
 - “Does that sound good?”
- “We don’t have an appointment for that day. Could I suggest the following week?”
 - “Could you please send in...?”
 - “It would be great if you could...”
 - “It is important that we get...”
- “Is there anything else I can help you with today?”
- “Feel free to ask me any questions you may have. I have the time and I can help.”
- “If you can’t keep your appointment, will you let us know so we can open it up to someone else? The number to call is”
- “It sounds like this appointment is important to you and I know your counsellor/nurse/worker is looking forward to seeing you.”
- “I am sorry to hear about the experience you have had.”