

Crittenden Partners

Customer Service Telephone Etiquette & Procedures

Goal: To ensure a consistency of high-quality service throughout the company. This includes maximizing personal communication over voicemail. We want every customer to have an exceptional experience, and be happy at the end of every contact with the company.

When to pick up the phone

1. When it rings. You should always pick up your line within three rings when you are at your desk.
2. The only time when it is acceptable to let a call go to voicemail is when you are within five minutes of a meeting.
3. For people inside the office, designate a primary person to answer your phone when you are away.

Phone Greeting

1. When answering the phone, use the following greeting:
 - a. Greeting [such as “hello, good morning, good afternoon,” etc.]
 - b. “Crittenden Partners”
 - c. Your name [“This is Jack”]
 - d. “How may I help you?”

How to put a customer on hold

1. Tell customers why you may need to put them on hold
 - a. Examples:
 - i. “the answer to your question will take a few moments because I need to consult someone else [I need to look it up on my computer]
 - ii. “I need just a minute to get the correct file”
 - iii. “I need a moment to check with another department”
 - b. Do not give the customer excuses for poor service or tell them you don’t know what is going on.
2. Ask the customer if you can put them on hold
3. Wait for a response, and then say “thank you”
4. Give a time frame for their wait
 - a. For less than one minute, “This will take a few moments”
 - b. For one to three minutes, “This question could take me two to three minutes to sort out. Would you like to hold or should I call you back?”

- c. For more than three minutes, “This will take some time to sort out. If you could please give me your number, I think it is best that I call you back with the answer.”
5. Thank customers for holding after returning to the line

How to transfer a call within the office

1. Explain why you are transferring them and to whom
2. Ask them if they mind being transferred
3. Put the person on “hold”, and notify the other person
4. Give the person you are transferring the call to the callers name, company, and nature of the call. They will then pick the person up from the “hold” position.

When the person they want to reach is in a different office

1. Explain who they want to speak to, using the name of the employee.
2. Collect the callers name, company and phone
3. Call the employee to confirm they are available for a transfer.
 - a. If yes, provide them the person’s name, company and phone number, and then make the transfer.
 - b. If not available, inform the caller that the person is not available and that you will have them call them back. Then text or email the message to the employee.

How to take a message

1. Explain your co-worker’s absence in a positive light
 - a. “She isn’t available at the moment”
 - b. “She stepped away from her desk”
 - c. “She is out of the office today”
 - d. “She is in a meeting”
2. Inform the caller of the availability of the person they want to speak with before asking their name
 - a. Please do not ask people to screen your calls
3. Give an estimated time of your co-worker’s return if possible
4. Offer to help the person yourself, take a message, or transfer them to another party
5. Write down all important information and attach any pertinent files
 - a. Get their name, and company name, phone number, nature of call
 - b. Get correct spellings
 - c. Read back the phone number to confirm it
 - d. Write date and time of call
6. Transfer them to voicemail only when they ask for it.

How to end calls

1. Repeat any action steps you will take to ensure that both you and the customer agree on what is going to be done

2. Ask the caller if you can do anything else for them
3. thank the customer for calling
4. Let the caller hang up first
5. Write down any important information as soon as you get off the phone

Other

1. You are expected to return all messages within 24 hours
2. When you answer a call, write down the persons name as soon as they give it to you (try to use their name three times during the call, as long as it is natural)
3. Before you answer the phone, take a deep breath and smile
 - a. This will calm you down, help you focus and change your mood to a positive one.
 - b. This will also mean that you will rarely, if ever, answer of the first ring or two. But that is not a problem.