**Telephone Etiquette: First Impressions**

A potential patient calling your department forms an opinion about you, your department, or your organization in the first 4-6 seconds. The person who answers the phone represents the organization to the caller. Even if your department has a superb reputation, anyone who answers or uses the phone can maximize the telephone’s powerful potential.

* **Don’t be too busy to be nice**. Being busy does not give you the carte blanche to be rude (The caller doesn’t know you’re on a tight deadline…) If it’s an inopportune time… suggest a callback time (from you or her/him) that’s more convenient to your schedule. When asking patients to hold, share with them it should be no longer than a few moments. As we all know, the biggest gripe is the interminable amount of time we are put on hold.
  + **Be and sound courteous, professional, understanding, helpful, and friendly**. Much of the secret is simple goof manners and attention. Be a good listener.
  + **Speak clearly and more slowly than usual.** Without the visual cues that you have when dealing face to face, more time is needed to absorb what is being said. Be particularly clear when saying your name and the name of your organization. Take the time to repeat them, particularly at the end of the call.
  + **Speak with more energy**. Telephones are not “hi fidelity” equipment and they rob your voice of expression. Try to inject increased interest and enthusiasm for what you’re saying. Your effectiveness increases when people enjoy speaking with you. It certainly decreases if you put them to sleep.
  + **Avoid, “emotional leakage.”** That’s getting mad at Phanny and taking it out on Ms. Smith. Do not leak negative emotions from one situation into another. The caller was not involved in your last conversation. Please do not take it out on them. If you’re in a bad mood, take a deep breath and regain your professional composure before you pick up the phone.
  + **Use body language**. Although not seen, physical gestures will come through in your voice. Sit up tall and ensure that your voice is powered by a good air supply.
  + **When appropriate “smile with your voice.”** A smile on your face is reflected in your voice. It can be heard. The secret to good phoning is to be friendly before you even know who it is calling.
* **Directing misdirected phone calls**. Above all else listen to the person. You can think faster than they talk. Answer the questions Who, What, Where, Why, and How by listening to them. Direct the conversation. You must do so in order to help the caller. Identify their problem and then get them to the correct place to get their problem solved. **You are here to help**.
  + **Explain things in an understandable way**. Don’t use medical jargon or assume that the patient has knowledge of your department or organization.
  + **Make it easy to be redirected**. Patients shouldn’t have to talk to half a dozen people before they can find one who can help. They shouldn’t be given another number or told to call back later. Ideally, they should be transferred through to the right person, or failing that, the right person should call them back.
  + **Know how to use all the buttons on your phone, and in particular how to transfer a call without losing it**. Simple things like these make all the difference when dealing with people over the phone.
  + **How to transfer a call**.
    - **Multiline Phone** – with the caller on the line pres “trans” or “conf 6”. Dial the extension you with to transfer to. Wait until you hear the phone ring and/or answered, announce the call, then pres “trans” or “conf 6” again, now hang up.
    - **Single Line Phone** – with the caller on the line, tap the switch hook (button under the receiver) once, this places your call on hold (the caller cannot hear you). Do not hold down the switch because this will disconnect the call. Dial the extension, wait for the answer, announce the call and then hang up.
* **Answer the phone** with the name of your department and your name. Everyone likes to know whom he/she is talking with. This holds true for internal as well as external calls. Use a healthy buffer (a friendly greeting) before saying your name. This indicates a warm reception. (Buffer example… “good morning \_\_\_ department, Phanny speaking”
  + **If possible, take messages**. Your department can utilize “May I take a message?”
  + **No matter what**, you need to behave professionally on the telephone **and maintain your composure**. Ask for information, “May I tell her who is calling?” Use the caller’s name, provide courtesies. “Sam is with a patient right now… may I have your name and number and I’ll see that he/she gets your message.” (Remember, the job is to get the message).
  + **Your message** should include the caller’s full name, phone number with area code, the message or action requested, the time and date of the call, and your name.
* **Responding promptly to phone messages**. You should not fail to get back to them promptly. Failing to do so usually comes across as “I don’t want to talk to you”, or sometimes” I haven’t done what I said I would, so I don’t want to talk to you yet”, or sometimes simply, “I’m rude and inefficient.” Somehow, failing to return a telephone call promptly has become, for many people, a sign of how busy and important they are. It isn’t.

**We are customers to each other.**

**Treat internal calls as well as you do external calls.**

**Forbidden phrases**

* Try replacing phrases that may have a negative connotation with these good alternatives. “I don’t know” should be replaced with “That’s a good question, let me check and find out.”
* “We can’t do that.” Instead say, “Let me see what I can do,” and strive to get something similar or offer an alternative.
* “You’ll have to…” The patient doesn’t have to do anything. There is a subtle difference between ordering the caller around and saying, “Here’s how we can handle that. You’ll need to…”
* “Just a second, I’ll be right back.” It’s a lie. Instead say, “It will take a few minutes. Are you able to hold that long?”
* “No” at the beginning of a sentence. It’s a word conveying total rejection. By not saying “no”, people will think before talking and can turn everything around so they’re beginning a response positively.