

Sutter Health Valley Area Clinical Laboratory Services	TRAINING DOCUMENT
Telephone Operation & Best Practices	Revised Date: 10/23/13, 9/1/2021 Revised by: H.Rabinovitz, E.Padilla

Whether you are answering the phone or making a phone call, using the proper etiquette is necessary in order to maintain a certain level of professionalism. Proper etiquette leaves callers with a favorable impression of you, the laboratory, and Sutter in general. You'll also find that others treat you with more respect and are willing to go out of their way to assist you.

Good phone skills can make the difference in how we are perceived as a business. It is not always "what we say" but "how we say it" that creates a good or bad customer perspective. Callers remember the intangibles about phone calls more than the answer to their questions: how they were treated during the call and how the staff member made them feel.

Using phrases such as "thank you" and "please" are essential in displaying a professional atmosphere.

Answering the telephone:

1. Answer promptly (before the third ring if possible).
2. Greet the caller by identifying your location and name, such as "Call center, this is <name>, may I help you?" OR "Good morning, Sutter Lab, <name> speaking, how may I help you?"... Use a greeting that is going to give the caller the impression that we are professional and pleasant.
3. Greet the caller with a smile in your voice.
4. Before picking up the receiver, discontinue any other conversation or activity such as eating, chewing gum, typing, etc that can be heard by the calling party.
5. If you are currently on one line and another line rings:
 - Ask the first caller "May I please put you on hold for a moment?"
 - Place caller on hold.
 - Answer the ringing line saying, "[Department name], I'm on another call, may I put you on hold for a moment?."
 - Place second caller on hold.
 - Return to first caller and complete the call.
 - Thank callers for holding
6. Learn to listen actively and listen to others without interrupting.
7. Use hold button when leaving the line so that the caller does not accidentally hear conversations being held nearby.
8. When transferring a call, tell the caller where and the number, in case they are disconnected.
9. If the caller has reached the wrong department, be courteous. Sometimes they have been transferred multiple times with a simple question. If possible, attempt to find out where they should call/to whom they should speak. They will greatly appreciate it.

10. When the called party is not in, the following responses should be used to give a more tactful response:

What You Mean:	Tell the Caller:
"He is out."	"He is not in the office at the moment. Would you like to leave a message on his voicemail?"
"I don't know where he is."	"He has stepped out of the office. Would you like to leave a message on his voicemail?"
"He is in the men's room."	"He has stepped out of the office. Would you like to leave a message on his voicemail?"
"He hasn't come in yet."	"I expect him shortly. Would you like to leave a message on his voicemail?"
"She took the day off."	"She is out of the office for the day. Can someone else help you or would you like her voicemail?"
"He doesn't want to be disturbed."	"He is unavailable at the moment. Would you like to leave a message on his voicemail?"
"She is busy"	"She is unavailable at the moment. Would you like to leave a message on her voicemail?"

Taking Messages

1. Be prepared with pen and message slip when you answer the phone.
2. Offer to take a message or to transfer the caller to voicemail.
3. When taking messages be sure to ask for:
 1. Caller's name (asking the caller for correct spelling.)
 2. Caller's phone number and/or extension (including area code)
 3. Ask for location (PSC, hospital, vendor), and ask what the call is in regard to.
4. Repeat the message to the caller.
5. Be sure to fill in the date, time, and your initials.
6. Place the message slip in the called party's inbox or in a conspicuous place in their office, such as their chair.

Handling Rude or Impatient Callers

1. Stay calm. Try to remain diplomatic and polite. Getting angry will only make them angrier.
2. Always show willingness to resolve the problem or conflict.
3. Try to think like the caller. Remember, their problems and concerns are important.
4. Non-supervisory: Offer to have your supervisor talk to the caller or call him/her back if the caller persists.

Supervisor: Be willing to handle irate callers. Speak slowly and calmly. Be firm with your answers, but understanding. Sometimes the irate caller just wants someone in a supervisory capacity to listen to their story even if you are unable to help them.

Making Calls

1. When you call someone and they answer the phone, do not say "Who am I speaking with?" without first identifying yourself: "This is _____. To whom am I speaking?"
2. Always know and state the purpose of the communication.
3. When you reach a wrong number, don't argue with the person who answered the call or keep them on the line. Say: "I'm sorry, I must have the wrong number. Please excuse the interruption." And then hang up.
4. If you told a person you would call at a certain time, call them as you promised. If you need to delay the conversation, call to postpone it, but do not make the other person wait around for your call.
5. If you don't leave a number/message for someone to call you back, don't become angry if they are not available when you call again.

Keep in mind the Golden Rule when it comes to phone etiquette. Don't make people dread having to answer their phone or call your department.

How to End Conversations Gracefully

There are several ways that you can end a long phone call without making up a story or sounding rude:

1. Promise to finish your discussion at another time.
2. End on an "up" note.
3. Summarize the conversation or action items
4. Tell the person how much you've enjoyed speaking with him/her.

As long as you are honest and polite with the other person, you shouldn't have any problems getting off the phone and onto something else.

Leaving a Voicemail Message for Another Person

1. Speak clearly and slowly.
2. Be sure to leave your name and extension number. It's best to say it at the beginning and end of your message.
3. Keep messages short and to the point.
4. Leave the date and time you called in the message. Let the person know the best time to call you back.
5. Cover one topic in one message; specify what you want the recipient to do.

Words and Phrases That Keep Callers Cool

1. Hello! I'm sorry to keep you waiting.
2. Good morning! Thank you for waiting.
3. Please. It was nice talking with you.
4. Thank you. Is there anything else I can do for you?

5. It's been a pleasure to serve you.
6. You're welcome. I'd be happy to do that for you.
7. We appreciate your business.
8. May I help you?

Are You Sure You're Understood?

To prevent misunderstandings, listen closely to what you say. Try these tips:

- Repeat, or spell out, information. All names, addresses, numbers, and dates should be repeated or spelled out. And be specific. Instead of saying, "We'll be open again tomorrow," say "We'll be open from 8am-5pm tomorrow." For confusing numbers, say, "That's 30: three-zero" or "13: one-three."
- Ask for feedback. You can "quiz" your callers on how well they're listening by asking them to repeat information. Say: "Do you mind repeating that number back, so I can be sure I gave it to you correctly?"
- Encourage questions. This technique is especially useful for complex topics. Again, be careful that you don't talk down to the caller: "I know I've covered a lot. Is there anything you'd like me to review?" Or, "Before we hang up, is there anything I was not clear about?"

What To Do When You Make a Mistake

Everyone makes mistakes. If you think about it, you've probably made your share of them over the years - a misdirected package, a misrouted file, a forgotten deadline. Typical reactions? Embarrassment, anger, and frustration.

There is great virtue in making mistakes, learning from them, and improving along the way. Why don't people realize that mistakes are really great opportunities? When you fix a problem, you not only get a chance to right a wrong, but you can build a strong working relationship, too.

You can recover from blunders and be a winner. Here's how:

- Make things right. Your first responsibility is to correct the mistake. The faster you address the problem, the more credible you'll appear to others.
- Apologize. When you make a mistake, you'll usually gain stature by apologizing in a direct way. You won't appear incompetent, only human. And you send the message that you're big enough to admit it.
- Let the matter rest. There is no need to beat a dead horse by bringing up the matter over and over again. One apology suffices.
- Learn more about operations. If you have to track down a goof, use the occasion to learn more about the intricacies of your department operations. This knowledge will come in handy over time. And it can prevent mistakes down the line.

- Ask if you can do something else. After resolving your mistake, ask if you can help in any other way. Perhaps an "I'm sorry" doesn't seem sufficient. Offering something extra can build good will.
- Let others know you've learned something. Assure those affected by your error that it won't happen again. If you have learned something from the experience that would be helpful for others in your office to know (such as application deadlines, etc), share the information!
- Keep records. Keep a record of errors made, the causes, and their solutions. Review the list of mistakes to prevent their recurrence.

Most Frequent Caller Complaints

1. "The telephone rings for a long time before it is answered."

Try to answer calls within 3 rings. Callers become frustrated when they feel that their call is not important to you.

2. "They place me on hold for sometimes, it seems, hours."

If you find yourself placing many calls on hold, write down the name of the caller and a brief description of what they are calling about. If the caller has been holding for quite a while and you know they will be holding even longer, pick up the line and say: "I'm sorry, but the person you want to speak to/need to speak to is still unavailable. Did you want to continue to hold or would you like me to take a message/send you to their voicemail?"

3. "The line is busy for hours it seems."

Try to keep calls short. Do not stay on the line longer than is absolutely necessary.

4. "They are very rude and get offensive when asked their full name or sometimes just won't give it."

Try to stay pleasant. Callers are not trying to be rude by asking your full name. Often, callers will be given incorrect information and then are asked: "Who told you that?" If all they know is that "Jane" gave them the information, it will be difficult to track down the person who gave out the incorrect information.

5. "They let me talk on and on only to realize that they're not the person I should be talking to."

Politely interrupt the caller if you are unable to help them. Don't waste your time (and theirs) by listening to a long story and then transferring them. Say "Excuse me, sir/ma'm but I am unable to assist you with this issue. Let me transfer you to Jane Smith, who will be able to assist you." If transferring them to another department, indicate that you are doing so.

6. "They told me to call back, but never gave me a name or number or division to ask for."

If you tell a caller to call back later, tell them which number to call. Even if you give them the main department number instead of your personal extension, it will help if they were transferred to you by another department. Tell them who to call and give them an approximate time to call back. (i.e. "Ms Smith is unavailable right now. But if you call 278-2011 in about an hour and ask to speak to her, she should be able to take your call.")

7. "The person says, 'Wait', and then talks to other co-workers without putting me on hold so that I can hear their small talk."

Use the hold button! Whenever you are going to leave a caller to check something or to help someone else, use the hold button. Callers shouldn't hear the background noise of your office even if it will be for a short while. If what a caller hears is different from what you tell them, they may be confused or angry.

8. "They answer with an aggravated voice, as if I disturbed them by calling."

It is difficult to stay polite all the time, especially during the high volume periods. But again, your disposition reflects on Sutter and the laboratory. Try to treat each caller as you would hope to be treated.