

UNIVERSITY OF NORTH FLORIDA TELEPHONE BEST PRACTICES

The University of North Florida considers the telephone an important means of communication and recognizes the importance of proper telephone and voice mail practices in conveying a professional image and delivering our commitment to individualized attention, student focus and customer service to those within and outside the University.

The following are “best practices” for telephone use compiled by the Center for Professional Development and Training and reviewed by the Office of the General Counsel. These best practices are not intended to be an all inclusive list of proper telephone use or to replace University policies.

Department heads and supervisors, in consultation with departmental colleagues, shall determine telephone and voice mail standards (e.g. maximum number of rings, department greeting, expected turnaround time for return calls, voice mail and other protocol) affecting the efficient operation of the unit and the University’s commitment to student focus and customer service. If you are a new or current employee, become familiar with these telephone best practices and speak with your department head or supervisor about department telephone protocol. Additional resources are provided at the end of this document.

Privacy Guidelines

- Voice mail messages made or received by UNF employees in connection with official University business are by law public records and subject to disclosure. Consequently, please be mindful of this fact when leaving voice messages for others.

Be prepared

- When making or receiving a call, turn away from your computer, desk or other work and have pens, pencils and notepaper handy to take down important information and to provide the person you are speaking with your full attention.

Your voice is you, but also the voice of the University

- Every time you make or receive a telephone call at work; you are representing yourself, your department and UNF.
 - The impression you create will be a lasting one.
 - Make sure your voice and mannerism reflect that you are alert, focused on the present task and at your best.
 - You can speak effectively without raising your voice so as not to distract co-workers or others on the phone in your office.

Answering the phone

- Answer promptly. Some departments have standards for the maximum number of rings.
 - Check with your department head or supervisor.

Appropriate greeting

- Proper telephone technique includes incorporating three components in answering the phone: (1) a greeting (Good morning, good afternoon), (2) the name of the department (Academic Affairs) and (3) your name. (Example: “Good morning, Academic Affairs, Ann speaking”.)
 - The caller should then identify himself/herself and give a reason for calling. Pronounce the caller's name distinctly and repeat it frequently. The sweetest music to a person is the sound of his/her own name!
 - Use active listening to clarify and check for understanding. (Example: You are registered for this Tuesday’s Finance Self Service class but would like to be rescheduled for another session, is this correct?)
 - Some departments have a preferred department greeting. Check with your department head or supervisor.

Be as helpful as you can

- To avoid unnecessary customer delays, handle as much of the transaction as you can yourself. If a caller reaches you in error, try to assist them in locating the proper person to speak with to assist them.

Leaving the line

- If you need to leave the line to obtain information, it is courteous to give the caller the option of waiting or being called back.
 - You might ask, "Would you prefer to hold?" or "Shall I call you back?" If the caller waits, be sure to actually place them on hold, rather than laying down the phone, and give progress reports every minute or so. This lets the caller know that he/she has not been disconnected or forgotten. When you return to the line, thank the caller for waiting.

Avoid the five forbidden phrases

- "I don't know."
 - Instead, say: "May I find out and get back with you". Take down the caller's name and telephone; then research the question and return the call. If you know someone else in the office can help the caller immediately, offer to connect the caller with someone who can provide the answer. Check that the person is in the office and able to take the call before transferring the call. If a call involves some research, assure the person that you will call back by a specific time. If you do not have an answer by the deadline, call back to say, "I don't have an answer yet, but I'm still researching it." Some departments have a standard for turnaround time. Check with your department head or supervisor.
- "I/we can't do that."
 - Instead say: "This is what I/we can do."
- "You'll have to..."
 - Instead say: "You will need to" or "I need you to" or "Here's how we can help you."
- "Just a second"
 - Instead: Give a more honest estimate of how long it will take you and/or let them know what you are doing.
- "No."
 - Instead: Find a way to state the situation positively. Use "LEAPS" with the emotional caller to vent.
 - **L** Listen; allow the caller to vent.
 - **E** Empathize; acknowledge the person's feelings
 - **A** Apologize when appropriate, even if the problem is not your fault, you can say, "I am really sorry this has happened".
 - **P** (Be) Positive
 - **S** Solve; suggest/generate solutions that you can both agree on and/or ask what you can do to help and, if reasonable, do it! If not, find a compromise.

Concluding the call

- End the conversation with agreement on what is to happen next; if you are to follow-up, do so immediately.
 - Before you end the call, be sure you have met the caller's needs by asking if there is anything else you can do to help.
 - Thank the caller for calling.

Transferring calls

- Transfer ONLY when necessary; get and provide the information yourself when appropriate.
- If you must transfer, avoid the use of the word "transfer." Say instead: "I am going to connect you with (state the name of the person) at extension (state the extension number)".
- Explain why the call needs to be handled by someone else. Example: "Jane manages Ms. Kaye's calendar and may be able to assist you."

- In order to announce to the receiver of the call who is on the line, it is permissible to ask who is calling (Example: "May I tell Dr. Campbell who's calling?") This will allow the receiver of the call to be prepared to talk with the caller and address him/her directly by name.
- Before connecting, tell the person you are transferring the call to who is on the line and ask if the call may be transferred. (Example: Mary, a parent is asking to meet with Dr. Gonzalez; may I connect the call?)

Taking messages

- When a call comes in for someone that is out of the office, explain to the caller that the person is not in his/her office and ask if they would like to leave a voice message or if there is someone else that may be able to assist them.
 - If known, indicate when the person will return to the office. Example: "Richard is out of the office until Wednesday. Would you like to leave a voice message or is there someone else that may be able to assist you?" If the person is at lunch or on leave attending a doctor's or other personal appointment, simply state the person "is out of the office at this time" rather than providing unnecessary or confidential information.
- If the caller prefers to leave a message with you, write down all the important information given.
 - The name of the caller (ask for spelling if unclear), the correct telephone number of the caller and the message. Ask for clarification if necessary and read back what you've written to be sure you've understood the message correctly. Always assure the person that you will deliver the message promptly. Deliver the message in a timely fashion.
 - Some departments have a protocol for taking messages. Check with your department head or supervisor.

Personal Calls

- The University understands the occasional use of certain resources (e.g. computer and telephone) for personal reasons; however, such personal use by University personnel should not result in expense to the University or interfere with the performance of required duties or the University's mission.

Do not

- Eat, drink or chew gum while on the phone.
- Leave an open line.
- Place the caller on hold without checking back with the caller every 30-45 seconds.

Always

- Put a smile in your telephone voice and let your personality shine!

Resources

Effective Telephone Skills by Thomas J. Farrell

Great Customer Service on the Telephone (Worksmart Series) by Kristin Anderson

SkillSoft - Effective Telephone Technique - 5 hr. online course <http://unf.skillport.com/spunf/login/login.cfm>