

Procedure: Telephone answering

Procedure for answering incoming telephone calls

Action	Done	NA	Ref
Step 1. Use the calendar to stay current with people who are out of the office, in meetings or not taking calls to enable you to put the call through or take a message.	<input type="checkbox"/>	<input type="checkbox"/>	
Step 2. Ensure that someone is available to answer the telephone at all times.	<input type="checkbox"/>	<input type="checkbox"/>	
Step 3. For forwarding messages to team members refer to the Email policy (¶1483-000) (if you are unable to transfer the call).	<input type="checkbox"/>	<input type="checkbox"/>	
Step 4. Smile before you pick up your phone (they can tell).	<input type="checkbox"/>	<input type="checkbox"/>	
Step 5. Where possible, answer the phone at the end of the first ring as this is the 2nd ring for the caller.	<input type="checkbox"/>	<input type="checkbox"/>	
Step 6. Use the greeting style preferred by the firm: <ul style="list-style-type: none"> • 'Good morning, [Practice Name]'s office, this is [First Name, Surname]' • Also refer to the Helpful Telephone Guidelines script (¶1608-035) 	<input type="checkbox"/>	<input type="checkbox"/>	
Step 7. Listen attentively, be positive, do not interrogate.	<input type="checkbox"/>	<input type="checkbox"/>	
Step 8. Use question softeners like: <ul style="list-style-type: none"> • Could I just ask? • Tell me • By the way • Incidentally 	<input type="checkbox"/>	<input type="checkbox"/>	
Step 9. Give out little bits of information at a time.	<input type="checkbox"/>	<input type="checkbox"/>	
Step 10. Talk in plain English. Clients do not appreciate technical jargon.	<input type="checkbox"/>	<input type="checkbox"/>	
Step 11. Regularly check the caller's response: <ul style="list-style-type: none"> • How does that fit in with your schedule? • How does that fit in with what you had in mind? • How does that sound? • How comfortable are you with that way of doing things? • How do you feel about that? 	<input type="checkbox"/>	<input type="checkbox"/>	
Step 12. For a new client, take all necessary details: phone, email etc.	<input type="checkbox"/>	<input type="checkbox"/>	
Step 13. For existing clients, confirm the details on the client database are correct.	<input type="checkbox"/>	<input type="checkbox"/>	
Step 14. Confirm the time that you will follow up any queries the caller has.	<input type="checkbox"/>	<input type="checkbox"/>	
Step 15. Hang up last, just in case the caller has one last question or comment.	<input type="checkbox"/>	<input type="checkbox"/>	
Step 16. Return all telephone messages the same day.	<input type="checkbox"/>	<input type="checkbox"/>	

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