

## Script: Telephone — helpful telephone guidelines

### Some Helpful Telephone Guidelines

Situation	Use
If team member is somewhere in the office, but there might be a small delay in putting the client through	'While I just locate [Name], would it be okay if I just put you on hold for a moment?'
If the person is available immediately	'Certainly, I'll transfer you to [Name] right now.'
If the client wishes to make an appointment	'Tell me, what day and time would suit you best?'
Team member is not in the office	'Thank you so much for calling, [Name] is actually away from the office right now, maybe in the meantime there's some way I can help?' <b>Never use the word unavailable</b>
If the client asks you a question you are unable to answer	'Could I just put you through to [Name of someone who is available], he/she is more experienced in that particular field — would that be okay?'... 'Thanks for your call; I'll transfer you to him/her right now.'
Someone is away	'[Name] is away on business and will be back on [Specific Date], in the meantime is there some way I can help?'
Confirming details, e.g. appointments	'So we'll be seeing you next Tuesday at 9.00 am'
Where the appointment time is not appropriate	'[Name] can't actually see you until 9.00 am, would that be okay?'
Client comes to the front desk and person needed is on the phone	'[Name] is on a call right now, he/she shouldn't be very long, would you like to take a seat and he/she will be with you as soon as possible.' The client is not to be kept waiting more than five minutes. If necessary, put a note under team member's nose.
If you need to ask a question — don't interrogate — always use a question softener	'So that I can best help you, can I just ask...'
If for any reason you keep a client waiting, try the phrase	'Thank you for waiting' — rather than 'I'm sorry for keeping you waiting'.

Banned Phrases	Use these instead
[Name] is unavailable	
[Name] is in a meeting	[Name] is with someone right now
[Name] is not in yet	
[Name] is at lunch	[Name]'s at lunch and will be back at ...
[Name] is on holiday	[Name]'s on holiday and will be back ...
Can I take a message	In the meantime, maybe there's some way I can help?
Put you through	I'll transfer you to [Name] right now.
Yeah/Yep	Yes

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