

Basic business telephone etiquette

Key words and phrases

a bad time

a good time

check in on

free

interrupt

on hold

voice mail

voice mail messages

→ Using good telephone etiquette

A. Be polite

Use the phone professionally: be polite, respect other people's time, and use **voice mail** wisely. Just because you're not face to face doesn't mean you don't have to show basic courtesies.

- ① **Treat everyone equally.** Treat the initial operators or receptionists with the same respect you show their bosses.
- ② **Focus on the caller.** Eating or chewing gum while talking, carrying on other conversations, or obviously working on other tasks while talking on the phone all show disrespect for the person on the line.
- ③ **Be helpful.** When answering the phone, ask how you can help the caller.
- ④ **Don't demand special treatment.** Sometimes we all have to wait **on hold!**

B. Respect other people's time

- ① **Don't leave people on hold.** Even if you can't help a caller right away, **check in on** him or her periodically—every 30 seconds, preferably—to let the caller know that you are still aware of his or her presence and that you will help as soon as you can.
- ② **Identify yourself.** When taking a call, identify yourself and your company; when answering someone else's phone, inform the person of whose phone you have answered. When making a call, give your name, organization, and purpose of call as clearly as possible. If you speak to a receptionist and tell him or her the purpose of your call, don't assume your message will be passed on when you are put through, repeat your name and purpose of the call to the next person you talk to.
- ③ **Make sure the person you've called has time for you.** Ask if the person you've called has time to speak to you, whether you are calling unexpectedly or following a prearranged plan. If the person doesn't have time to talk, try to set up a time in the future before getting off the phone. Conclude business phone calls by thanking the person you are speaking to for his or her time.
- ④ **Keep your calls to business hours.** Unless you've specifically arranged it, try not to call before nine am or after six pm.

C. Use voice mail wisely

- 1 **Leave detailed messages so people can take action.** Your **voice mail message** should allow the listener to take appropriate action. At the bare minimum, leave your name, company, phone number, time of call, and purpose of call.
- 2 **Respond promptly to messages and voice mail.**

Sample Sentences

CD1-1

A Identifying yourself on the phone

- 1 Hi, this is Kelly Blair with Blair Associates. I'm calling for Wanda Kirwin.
- 2 Hi, this is Kelly Blair. I have a one o'clock phone interview with Wanda Kirwin.
- 3 Good morning. This is Kelly Blair of Blair Associates, and I'm trying to reach Wanda Kirwin.

B Asking about time

- 4 Sorry to call unannounced—have you got a second to brief me on the project?
- 5 Am I **interrupting** anything?
- 6 Have you got a minute?
- 7 Is this a **good time**/Is this a **bad time**?
- 8 Do you have time for a quick chat about the report?

CD1-2

C Arranging follow-up phone calls

- 9 Let's try to talk this afternoon instead.
- 10 Let me finish this up, and I'll ring you back in 20 minutes—will that work for you?
- 11 I'll be **free** at four o'clock—could you call me back then?
- 12 I'm really swamped this morning, but I can give you the information first thing tomorrow.

D Leaving voice mail messages

- 13 Hi, this is Laurel Herman of Gingerbread Houses, and it's two fifteen on Tuesday. I'm calling to ask you a few questions about the catering event next week. Please call me back at (718) 234-3039. Thanks.
- 14 Hello, this is Wanda Kirwin of Kirwin Events. I'm returning your call. It's three on Monday, and I'll be in the office until at least six, so please try me back at (202) 293-9894. Thanks.
- 15 Hi, this is Harold at Gingerbread Houses. I'm calling to let you know that the changes you requested for Tuesday's event have all be confirmed and carried out. If you have any questions, please call me back at (301) 887-4403; otherwise, I'll see you on Tuesday afternoon. Thanks.

A Pair work: Take turns enacting the following situations.

Example

Student One "Good afternoon, Jethro Tulle Design. _____ speaking. How may I _____?"

Student Two "Hello. I'd like to _____."

Student One "I'm sorry, _____. May I _____?"

SITUATION A

Student One You are a busy secretary at Jethro Tulle Design. Mark Sanchez, your boss, is away from his desk but will be back shortly. Hold his calls.

Student Two You are calling from Bridal Styles. You want to speak with Mark Sanchez about a dress design.

SITUATION B

Student One You are calling from Bridal Styles. You are put through to Mark Sanchez. You want to talk quickly about the dress designs for the upcoming fashion show.

Student Two You are Mark Sanchez. You are very busy and don't have time to talk. Schedule a different time to discuss the fashion show.

B Usage: Choose the most polite/proper option.

- _____ 1 Answering a ringing phone: _____
- Ⓐ Good morning, Zelig Industries.
 - Ⓑ Good morning, this is Jolene, secretary, may I help you?
 - Ⓒ Good morning, Zelig Industries, Jolene speaking. May I help you?
- _____ 2 Identifying yourself: _____
- Ⓐ I'm calling for Yougin Kim from Helping Hands.
 - Ⓑ This is Andy from Helping Hands, thanks.
 - Ⓒ This is Andy from Helping Hands. Is Yougin Kim available?

- _____ 3 Postponing a phone conversation: _____
- Ⓐ This isn't a good time for me, but can I call you back at three to talk?
 - Ⓑ I'm sorry, I'm really busy and I can't talk right now.
 - Ⓒ I'm so swamped. Let's talk later, OK?
- _____ 4 Answering the phone in someone else's office: _____
- Ⓐ Good morning, Wanda Kirwin's office. This is Sandy speaking. How may I help you?
 - Ⓑ Good morning, this is Sandy. May I help you? You've reached Wanda Kirwin's office.
 - Ⓒ This is Sandy, may I help you?
- _____ 5 Leaving a voice mail: _____
- Ⓐ Hi Wanda. Please call me back as soon as possible. I want to talk about the performance bonuses.
 - Ⓑ Hi Wanda, it's Ben. It's ten am on Friday, and I'd like to talk about the bonuses before the day's out. Please give me a call back on my direct line.
 - Ⓒ Good morning Wanda! How are you? I think we need to talk. Please give me a call back on my home phone.
- _____ 6 Making an unexpected call: _____
- Ⓐ Hi, Bob here. I'm sorry to trouble you. This will only take a minute.
 - Ⓑ Hi George. I really need to talk to you about the sales figures.
 - Ⓒ Hi George, it's Bob. Have you got a minute to talk about the sales figures?

C Listening: Listen to the conversations and answer the questions below.

CD1-3 Part 1

- _____ 1 The man _____
- Ⓐ asks if it's a good time.
 - Ⓑ leaves a message.
 - Ⓒ takes a call.

CD1-4 Part 2

- _____ 1 The man should have _____
- Ⓐ said his phone number.
 - Ⓑ said his name and organization.
 - Ⓒ said his name and phone number.

CD1-5 Part 3

- _____ 1 The woman should have _____
- Ⓐ left her phone number and her name.
 - Ⓑ left her phone number, purpose of call, and a message.
 - Ⓒ left her phone number, purpose of call, and time of call.

Taking calls and making calls

Key words and phrases

busy signal

off the hook

(do not put the part of
it that you talk with back
correctly and it will not
ring)

on another line

please hold

transfer

wrong number

Dialog → Answering the telephone

CD1-6

1 Joan answers the phone.

- Joan Good morning, you've reached the offices of Johnson and Pelt. This is Joan speaking. How may I help you?
- Caller A Good morning. I'd like to talk to someone about patenting a process I've developed.
- Joan You'll want to speak to Laura in our patents department. **Please hold** for a moment while I **transfer** you there.

2 Joan transfers the call and takes another call.

- Joan Good morning, Johnson and Pelt. This is Joan speaking, may I help you?
- Caller B Hello . . . I was trying to reach Pelt plumbing.
- Joan I'm afraid you've got the **wrong number**.
- Caller B Oh, I'm sorry. Thanks.

3 Joan hangs up and answers another call.

- Joan Good morning, Johnson and Pelt. This is Joan speaking. How may I help you?
- Caller C Good morning. I'm calling for Jack Pelt.
- Joan May I ask who's calling?
- Caller C This is Sam Johnson.
- Joan And can I tell Mr. Pelt what this is regarding?
- Caller C I'm an old friend of his—he'll know me.



Sample Sentences

CD1-7

A Taking calls

- 1 Good afternoon, Helix Industries.
- 2 Helix Industries, may I help you?
- 3 Good morning, Helix Industries. This is Clara speaking, may I help you?
- 4 Good afternoon, Jim Usherton's office, Clara speaking.

B Requesting information from callers

- 5 May I tell her who's calling?
- 6 Who's calling, please?
- 7 Who shall I say is calling?
- 8 May I ask what this is regarding?

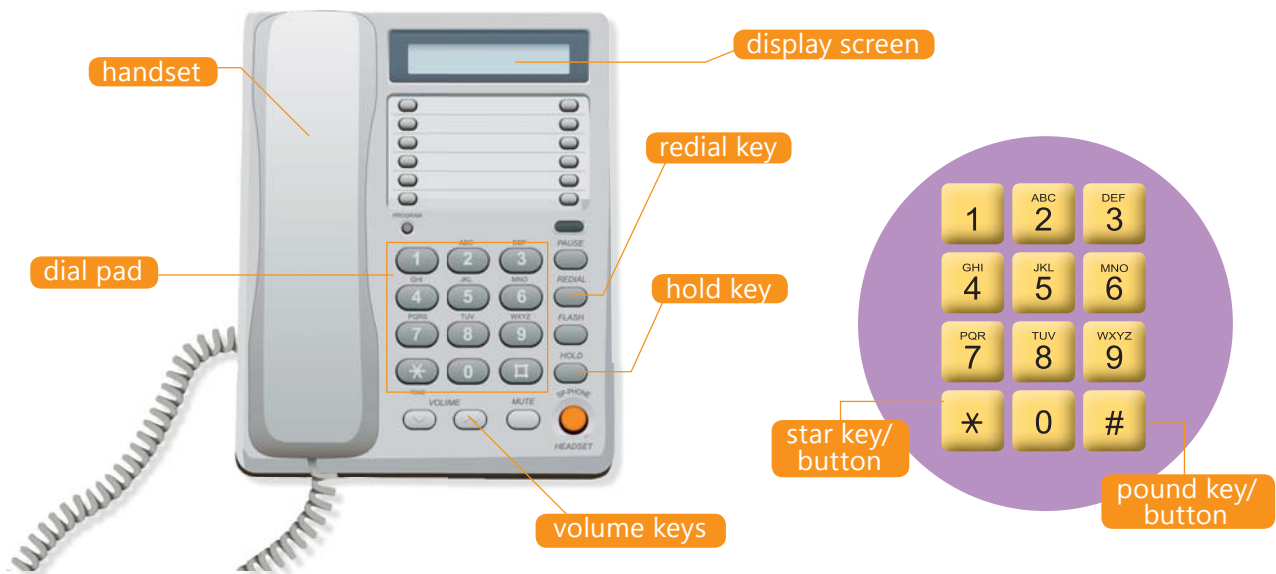
CD1-8

C Making calls

- 9 May I speak to Jim Usherton, please?
- 10 This is Howard James of Double Helix Technologies calling for Jim Usherton.
- 11 Hi, I'm trying to reach Jim Usherton.
- 12 I'd like to speak to someone in your human resources department, please.

D Transferring calls

- 13 Please hold and I'll transfer you to Mr. Usherton's office.
- 14 Hold one moment while I transfer you.
- 15 I'll put you through to human resources now.
- 16 I'm sorry, Mr. Usherton is **on another line**. Is there anyone else who can help you?
- 17 I'm getting a **busy signal** at Mr. Usherton's office. Can I transfer you to someone else?



EXERCISES

A Pair work

Take turns enacting the following situations. Student One will be the secretary for the first call, student two will be the secretary for the second call, and so on.

Example

Student One "Good morning, JR Industrial Design. How may I _____?"

Student Two "_____, this is _____.
I'm a _____ on the
_____ Project . . ."

You are the secretary for JR Industrial Design. Questions about design should go to John Jordan in the design department. Questions about construction should go to Yusef Saleem in the construction department. Transfer calls appropriately.

Caller 1 You are a constructing contractor working on a JR Industrial Design project called the Beam Project. You need to speak to someone about a problem with materials at a construction site.

Caller 2 You are a designer on an architecture project for JR Industrial Design. The project is called the Mars Project. You want to speak to John Jordan about some questions you have about the overall design.

B Vocabulary: Choose the correct word, phrase, or response for each question.

- _____ 1 "Good morning, Hi Tech Inc." " _____ "
- Ⓐ Good morning, Judy speaking.
Ⓑ Hi, I'd like to speak to Bob Ickles please.
Ⓒ Hi, this is Andrew. May I help you?
- _____ 2 "I want to reach Gregg, but I keep getting a _____."
- Ⓐ transfer Ⓑ busy signal Ⓒ line
- _____ 3 "Good afternoon, Hi Tech Inc."
"Hi, I'm calling from Gould's Paints about the paint samples you ordered."
"I'm sorry. I don't think we've requested any paint samples. I'm afraid you've got the _____."
- Ⓐ wrong line Ⓑ wrong transfer Ⓒ wrong number
- _____ 4 "I'm trying to reach Bob Ickles, but I've been _____ for ages. I think the receptionist has forgotten about me!"
- Ⓐ on hold Ⓑ on line Ⓒ to hold
- _____ 5 "Hi there. I've been trying to get through to Clara Coombes, but I keep getting a busy signal. Could you check to see whether her phone is _____."
- Ⓐ on another line Ⓑ off the hook Ⓒ on busy
- _____ 6 "I'd like to speak to Gloria, please." "Who _____ I say is calling?"
- Ⓐ do Ⓑ will Ⓒ shall

C Listening: Listen to the conversations and answer the questions below.

CD1-9

- _____ 1 The woman _____
- Ⓐ makes a call. Ⓑ transfers a call. Ⓒ holds a call.
- _____ 2 This is an example of _____
- Ⓐ a wrong number. Ⓑ a busy signal. Ⓒ holding.
- _____ 3 The man is _____
- Ⓐ ordering a call. Ⓑ making a call. Ⓒ taking a call.
- _____ 4 The woman will check the office to see _____
- Ⓐ if Karen Newton is on hold.
Ⓑ if the man's phone is off the hook.
Ⓒ if Karen Newton's phone is off the hook.

Taking messages and transferring information

Key words and phrases

ASAP: as soon as possible

away from one's desk

confirm

direct line

out of the office

pass along/pass on

put through

touch base with somebody

urgent

Dialog → Taking a message

CD1-10

1 Joan answers the phone.

- Joan Good afternoon, Johnson and Pelt. May I help you?
- Caller Hi, I'd like to speak to Ed Johnson, please.
- Joan Mr. Johnson is **away from his desk** at the moment. May I take a message, or would you like his voice mail?
- Caller Let me give you a message, please. This is Wei-Li from Global Solutions. I wanted to **touch base with** him about our presentation next week.
- Joan OK . . . can I ask you to spell your name, please?
- Caller Of course. It's W-E-I, L, as in lion, I.
- Joan Thank you. And your number, please?
- Caller I'm sure he has it, but I'll give it to you again. It's (202) 449-9930. Please ask him to call me back **ASAP**.
- Joan Certainly. To **confirm**, this is Wei-Li of Global Solutions, you're at (202) 449-9930, and you want to talk about the presentation, correct?
- Caller That's it, thanks.
- Joan I'll **pass along** the message as soon as Mr. Johnson returns.

2 Joan takes another call.

- Joan Good afternoon, Johnson and Pelt. This is Joan speaking, may I help you?
- Caller two Hi, I'm calling for Errol Pelt.
- Joan Mr. Pelt is away this afternoon in meetings. Would you like to leave a message, or would you like me to **put you through** to his voice mail?
- Caller two Voice mail is fine, thanks.

Sample Sentences

CD1-11

A Taking a message

- 1 Would you like to leave a message?
- 2 I can take a message for him, if you like.
- 3 Can I take a message for her?
- 4 Would you like me to pass a message on to her?

B Taking information

- 5 Could I have your name, please?
- 6 And you're with . . . ?
- 7 Can you tell me what this is regarding?
- 8 Will Mr. Johnson know what this is regarding?
- 9 Is this an **urgent** matter?
- 10 Is that your **direct line**?
- 11 When is a good time to reach you?

C Transferring to voice mail

- 12 Would you prefer her voice mail?
- 13 Would you care to leave a message on his voice mail?
- 14 Mr. Pelt's **out of the office**. I'll put you through to his voice mail.
- 15 Mr. Pelt's requested that his calls be put through to his voice mail.

