

Improving your telephoning skills



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Telephoning skills are vital in the workplace. This article discusses how we use phone conversations for different communicative purposes.

(I) What makes effective phone conversations?

Phone conversations are very common in the workplace, particularly in call centres where CSRs (customer service representatives) and customers exchange information and liaise on phone significant issues. Understanding cultural differences, active listening and appropriate use of voice and tone are all important.

The following are the criteria used in call centres to evaluate staff's performance in phone conversations (Lockwood, Forey and Elias 2009):

I. Making contact: create a professional image	
Components	Criteria for scoring
1. Greeting - offer welcoming words	No "Hi", "Hello", "can", "speaking"
2. Greeting - maintain upbeat tone	Does not drop in tone at the end, ends in an upbeat (form of a question)
3. Greeting - use unhurried pace	
4. Really listen - don't interrupt	Let caller vent
5. Express empathy through words	Can have this without #6 (i.e. express empathy through tone)
6. Express empathy through tone	Can't have this without #5 (i.e. express empathy through words)
7. Use caller's name as soon as you hear it	Find opportunity to use name - ask for it if not given

II. Act proactively: Tell them you are there to help	
Components	Criteria for scoring
8. Tell caller you will help	Must have "I", "you" and a verb - must be clear statement
9. Ask permission to gain more information	Must be clear question (when three or

		more questions are to be asked)
10.	Use "I" not "we" when appropriate	"We" used in reference to next steps, ownership
11.	Be courteous, use please and thank you.	Be polite and friendly
12.	Express sincere, helpful attitude	86% - majority of the call (i.e. whether the staff can express such attitude 86% of the time)
13.	Remain calm	Not defensive in words or tone

III. Get to the heart of the matter: Listen and probe

Components	Criteria for scoring
14. Ask questions to find the main point	Issue/purpose of the call
15. Repeat numbers	
16. Avoid jargon and dramatic phrases	Don't distance yourself from caller
17. Before hold or transfer - explain and ask permission	
18. After hold - use name, pause and say thank you	Don't distance yourself from the caller
19. Work with, not against the customer	Proactively initiate solutions - do more than just what you are supposed to do

IV. Interpret the fact: Highlight what you will do

Components	Criteria for scoring
20. Give security - use golden phrases	Personal, specific, empathic
21. Be knowledgeable and accurate	Technical/process oriented. Give caller the correct information
22. Keep call to appropriate length	Is there too much or too little information?
23. Be proactive - set a deadline	Don't wait for caller to ask when something will happen
24. Speak clearly at a proper volume	
25. Maintain appropriate pace	Don't speak too quickly or slowly; don't interrupt
26. Summarize the next step	Doesn't have to be everything, just what is next

V. Close with agreement

Components	Criteria for scoring
27. Get agreement on next steps	
28. Use customer's name	
29. End with a golden phrase	Give security in closing
30. Use sincere tone	No trailing off, dropping, or flat, sarcastic or defensive words/tone
31. Let caller hang up first	
32. Did you conduct the call professionally?	Must get #8 (i.e. tell caller you will help),

	#9 (i.e. ask permission to gain more information) and if so, will get #32
33.	Is the customer closer to a solution as a result of your interaction?
34.	Was the call within the average handling time?
35.	Was the customer completely satisfied with your service?

You may not be working in call centres but the above 35 criteria can give some insights into how important it is to make appropriate use of voice/tone and exercise active listening skills to offer prompt help to customers on phone. When having phone conversations in our daily life or in the workplace, we should pay attention to not just the use of different language expressions, but ways to make our message clear and consistent through judicious use of tone/voice and other effective listening skills.

(II) Language expressions for telephone conversations

This article discusses language expressions used in/when (a) beginning a call; (b) waiting and calling back; and (c) getting to the wrong person. Other communicative purposes will be examined in the next issue.

1. Beginning a call

Formal

Caller: Good morning. This is Mable Chan speaking, from The Hong Kong Polytechnic University. Could I speak to Mr Wong please?

Company: I'll put you through. (pause)

Company: Unfortunately Mr. Wong is not available at the moment.

Informal

Caller: Hi. Mable here. Is Peter there?

Company: If you'll just hold on a minute, I'll see if he's here.

Company: Peter's just popped out for a minute. Can you call back?

Caller: Sure. Bye.

Greetings	
<ul style="list-style-type: none"> - Good morning/afternoon/evening. - Hello. - Hi there! 	<ul style="list-style-type: none"> - Good morning, Wong and Associates. - Hello, Wong and Associates.
Introductions:	
<ul style="list-style-type: none"> - Hello. This is Mable Chan speaking. - This is Mable Chan. I'm calling from The Hong Kong Polytechnic University - Hi. This is Mable. 	<ul style="list-style-type: none"> - Hello, Mr. Wong - Hi Mr Wong. - Hello, Mr Wong, who would you like to speak to?

<p>Purpose of calling:</p> <ul style="list-style-type: none"> - Could you please put me through to Mr. Wong? - May I speak to Mr. Wong please? - I'd like to speak to Peter, please. - Peter, please. - Is Peter there? 	<ul style="list-style-type: none"> - Just a minute please. - Hold on a moment please. - Sure, hold on. - Just a moment please. - Certainly, just putting you through. - I'm sorry but Mr. Wong is not available at the moment/Mr. Wong is in a meeting/Mr. Wong is out at lunch/Mr. Wong is on the other line right now.
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2. Waiting and calling back

Formal

Company: Would you mind waiting for a few minutes? I'll just see if I can find out where he is.

Caller: Certainly.

Company: Sorry, I can't seem to find him at the moment.

Caller: Could you possibly put me through to his secretary, please?

Company: Yes, of course.

Company: Mr. Chan's office. Can I help you?

Caller: I would like to speak to Peter Chan please.

Company: He's in a meeting until 12:30pm. The best time to call is after lunch time.

Caller: This is Dr. Mable Chan from The Hong Kong Polytechnic University. Could you possibly ask him to call me back? I have something urgent to discuss with him.

Company: Sure. What numbers are you on?

Caller: He has my number but let me give it to you just in case. It's 27612999.

Company: I'll tell him you called, Dr. Chan.

Standard

Company: Can you wait a bit longer? I'm just trying to find him.

Caller: Sure. Thanks. (pause)

Company: Hello, are you still on the line?

Caller: Yes.

Company: Sorry that he's tied up at the moment.

Caller: It's alright. I'll try again later.

Company: Shall I tell him you called?

Caller: Yes, please. It's Mable Chan. Thank you. (Use "It's" or "This is", not "I'm")

<p>Waiting:</p> <ul style="list-style-type: none"> - Would you mind waiting? - Could you hold a little longer? - Could you hold on a minute? 	<ul style="list-style-type: none"> - No problem/Certainly. - Well, I'd rather call back later.
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<p>Calling back:</p> <ul style="list-style-type: none"> - He should be back in an hour. - The best time to catch him/to call would be about three. - Shall I ask him to call you back? 	<ul style="list-style-type: none"> - I'll call back then. - Thanks for your help. - Okay. Thanks a lot. - Yes please. My number is 27429098.
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3. Getting through to the wrong person

Example 1:

Caller: Could I speak to Ms Mary Wong, please?

Company: I beg your pardon? Ms who?

Caller: Ms Mary Wong. You have a Ms Mary Wong working there, don't you?

Company: I'm sorry, but I don't know that name. You may have the wrong name or company?

Caller: Oh I see. I'm sorry. I must have made a mistake.

Example 2:

Caller: I'm looking for Peter Wong. Could you please tell me which department he is in now?

Company: Peter Wong.....he's in the marketing department.

Caller: Could you put me through to him, please?

Company: Sure, please hold on. I'll get his extension number.

Caller: Thank you very much.

Example 3:

Caller: Could I speak to Jessica Lee, please?

Company: I don't know that name. Are you sure you have the right name?

Caller: I'm sorry. It's Jessie Lee not Jessica.

Company: Oh yes, Jessie Lee is no longer with us.

Caller: Have you got her new number?

Company: I'm afraid not, sorry.

<p>To the wrong person:</p> <ul style="list-style-type: none"> - Mr. Lee, please. - Could you please put me through to Mr. Lee please? 	<ul style="list-style-type: none"> - I'm sorry I've never heard of that name/I don't know that name.
<p>The person no longer works there:</p> <ul style="list-style-type: none"> - I was told she worked there. - I guess she was the Marketing Manager. - Perhaps someone else can help? 	<ul style="list-style-type: none"> - There must be some mistake. - I'm sorry, she's no longer in this department/at this company. - Sure. I'll put you through to Mr Chan.
<p>Asking for a person's number/extension:</p> <ul style="list-style-type: none"> - Do you have her new number? - What's Mr. Lee's extension, please? 	<ul style="list-style-type: none"> - I'm afraid not. - Sure. It's XXXXXXXX. - He's on extension 7741.

Quiz:

Fill in the blanks and complete the phone conversation.

Mary: Good morning, Jones's company.

Mable: Good morning. _____ Dr. Mable Chan _____. I'm _____ The Hong Kong Polytechnic University.

Mary: How can I _____ you?

Mable: I'm trying to get _____ Ms Fan. Is she _____?

Mary: I'll just _____ for you, Dr. Chan.....Hello, are you still there? _____, Ms Fan is not available at the _____. Would you like me to put you _____ Gary Wong, her assistant?

Mable: Yes please. That's very _____ of you.

Mary: You're welcome.

Answer:

Mary: Good morning, Jones's company.

Mable: Good morning. This is Dr. Mable Chan here. I'm calling from The Hong Kong Polytechnic University.

Mary: How can I help you?

Mable: I'm trying to get hold of Ms Fan. Is she available?

Mary: I'll just find out for you, Dr. Chan.....Hello, are you still there? Unfortunately, Ms Fan is not available at the moment. Would you like me to put you through to Gary Wong, her assistant?

Mable: Yes please. That's very kind of you.

Mary: You're welcome.

References

Lockwood, J. Forey, G. & Elias, N. 2009. Call Centre Communication: Measurement Processes in Non-English Speaking Contexts. In D. Belcher (ed). *English for Specific Purposes in Theory and Practice*. Ann Arbor, Michigan: Michigan University Press.