Phone Etiquette: Dos and Don’ts

Here are 10 things to keep in mind when handling phone calls

By Nancy Friedman, president, Telephone Doctor Customer Service Training

Most executives tune out when the subject of telephone skills comes up. Many of these folks seem to believe they’re in an ivory tower and therefore exempt from telephone-skills training.

This is wrong, however. In all industries — especially the mortgage industry, where customer service is of utmost importance — having proper phone skills is essential. There are no job-title restrictions on this topic; everyone within an organization should have some sort of phone-skills training.

Remember, it all starts at the top. So many managers and top-level executives have poor phone skills. Here, in no particular order, are some valuable phone skills for everyone.

1. Do acknowledge all your calls. If you cannot return a phone call yourself, at least have someone return it on your behalf. Not returning a phone call is like not using your turn signal when driving. It’s rude and sometimes dangerous.

2. Do place your own phone calls. If you must have someone else place a call for you, be ready when the person you’re calling is on the line. Not returning a phone call is like not using your turn signal when driving. It’s rude and sometimes dangerous.

3. Do give bad news yourself. You can’t deliver on time? Do you have to cancel a contract? It’s best to give this news yourself, when possible. Having someone else deliver your bad news is “distance-induced bravery.” Be careful about giving bad news via e-mail and voice mail, as well. Bad news is best delivered face to face or on the phone directly with the person. You can leave a message saying you need to discuss a situation.

4. Do identify yourself when accepting incoming calls. Do this even when you’re using caller ID — it may not always be who you think it is. Saying “hello” isn’t exactly a business greeting on the phone. Everyone likes to know with whom they’re speaking — don’t you? Saying something as simple as, “Hi, this is [insert your name here],” will work fine.

5. Do expect your called party to be unavailable. Expect voice mail. Be prepared to leave a detailed message with full disclosure of who you are and how to reach you. Here’s a bonus: Leave your phone number twice — and slowly.

6. Don’t make employees lie to your callers by having them say you’re not there when you actually are. Face the music. Better yet, train your staff to handle the call. It’s much healthier than an out-and-out lie.

7. Don’t be too busy to be nice. We’re all busy. Being busy does not give you carte blanche to be rude.

8. Don’t hide behind voice mail. It was not intended as a screening device or to warehouse calls.

9. Don’t use a speakerphone on initial greetings. Echoey voices should not be the first thing a caller hears. Answering a call using speakerphone tells callers, “I am too important to pick up the phone.” When you do need to use speakerphone, always ask if the other party minds.

10. Don’t use a cell phone for full-blown sales calls or presentations. There’s too much chance for distraction and of course, for an accident. And while we’re on the topic of cell phones, when using it in public, take it to a place where you’re not disturbing everyone.

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