



higher education
& training

Department:
Higher Education and Training
REPUBLIC OF SOUTH AFRICA



SUBJECT: OFFICE PRACTICE

LEVEL: 3

**MODULE 21: MAKING DECISIONS ABOUT BEST PRACTICE
AND ACTING ACCORDINGLY**

TOPIC

After completing this topic, you will be able to:

- Prepare all necessary documentation and equipment before making outgoing calls
- Decide whether to help a caller yourself, or transfer them to another person in the organisation
- Screen a call and transfer the caller to another person who is able to assist them
- Take messages for others in the organisation
- Decide whether to take a detailed message or offer to have the customer called back
- Deal with callers quickly and politely, in keeping with the organisation's image and standard telephone etiquette
- Decide whether is disclosable or non-disclosable and explain why

Unit 21.1: Preparing for an outgoing call

Before calling a client, supplier or business associate, the following preparations should be made:

- **DETERMINE THE PURPOSE** of the call.
- Have the **PERSON'S FILE OPEN** for reference of key information
- If you made notes on a client's request, **HAVE THE NOTES READY** before making a call
- If you have to call the person with information about advertised **POSTS, PRICES, SPECIAL OFFERS OR NEW PRODUCTS OR SERVICES**, have the necessary **ADVERTISEMENT (S) AND PRICE LISTS ON HAND**.
- If you are calling on behalf of your employer to cancel or confirm an appointment or to alter arrangements, **HAVE THE DIARY OR ELECTRONIC DIARY NEXT SO THAT YOU CAN WRITE DOWN NEW APPOINTMENT DATES(S) AND TIME(S) IMMEDIATELY**
- **ENSURE THAT NECESSARY WRITING MATERIALS** are ready to avoid wasting time searching for them.

Unit 21.2: Transferring calls

Frontline employees should be knowledgeable about the **functions, products, services, employees** and **departments** of the organisation so that they are able to assist the callers

- A telephonist/switchboard operation should know realised when **SHE CANNOT HANDLE A REQUEST AND TRANSFER THE CALL** to the most knowledgeable and competent employee. No caller wants to be transferred from one person to another at their own expense! This creates an image of inefficiency and the caller may decide never to do business with the organisation again.
- If you listen to the caller's request and realise that you cannot assist them, **INFORM THEM AND SAY THAT YOU WILL TRANSFER** the call to another staff member.
- Sometimes a caller will request to speak to a specific staff member (by name); you should ask their name and reason for the call. Transfer them if the staff member is available, giving the caller's details before putting the call through.

Unit 21.3: Screening a call:

Following is type of information to be obtained from the caller before transferring them:

- Their name (spelt correctly)
- The company they work for (if applicable)
- The reason for their call

Once you have established this information you will probably know the best person to deal with their request, unless they have already asked for a specific person.

A polite way to obtain the vital information from a caller is to ask probing questions such as:

“**Can I take your name. sir/madam?**” or “**Whom may I say is calling?**”,

Ask the caller to spelt out their names for you by asking:

“**Would mind spelling your name for me please?**” or “**How do you spell that?**” refer to page 177 of the textbook regarding how to ask probing questions.

- Remember to write down the answer to each question clearly so that you are able to refer to it later
- Now you are able to supply the staff member with the following information: **students to read through the text on page 180 of the textbook.**

Unit 21.4: Taking messages

It may happen that the staff member you wish to transfer a call to is not available. In order to supply excellent customer service you should **NEVER TELL THE CALLER TO CALL AGAIN LATER, RATHER OFFER TO TAKE A MESSAGE**. Ensure that you have required writing equipment such as a message pad a pen at hand.

PAY A SPECIAL ATTENTION to each of the following components of the message:

- **To:** the **name and/or surname of the staff member** for whom the call was intended
- **From:** **The name and surname of the caller** (ask them to spell these out if necessary)
- **Company:** the **name of the business the caller is calling from**; if it is a private call, indicate it as such.
- **Telephone number:** always ask for the caller's telephone number, **including a dialling code** and **the extension**
- **Date:** written only in one of the following ways: **2007-09-20** or **20 September 2020**
- **Time:** Use international time, e.g. 08:00 or 08h00
- **Message:**

Use **full sentences** and write in the **third person**, e.g. using he, his, her, etc.

Read the message once you have written it to see if anything requires clarification

Ensure that you **take numbers, times, amounts and dates correctly**

Ensure that your **handwriting is legible**

"Taken by" the **first name of the telephonist**, not the signature

Unit 21.4: Taking messages, continues

GUIDELINES TO BECOME MASTER OF TAKING MESSAGES:

- Always **use a telephone message** form to record the message
- Fill in all the information required
- **Record everything correctly** by listening attentively when the caller provides you with the information.
- **Ask the caller to spell a name/surname** you difficulty with by using the African alphabet
- **Read the message back to the caller** to confirm that you have completed it accurately
- **Assure the caller** that you regard the message as important and that **you will pass it on to the person** as soon as possible.

NB: STUDENTS TO STUDY THE MESSAGE PAD DOCUMENT ON PAGE 183 OF THE TEXTBOOK!

UNIT 21.5: DECIDING WHETHER TO TAKE A DETAILED MESSAGE OR CALL THE CUSTOMER BACK

- If a call is **personal or confidential**, offer them the **option of being called back** by the staff member in question.
- If the matter in question from the caller **is complicated**, then **offer to call the caller back** once you have the necessary information.
- If the reception **desk is busy**, **offer to call the person back** once things have settled down again.
- First listen to caller's request and decide whether to take down all the details of just the name, company name, telephone number, date and time of the call. **DO NOT USE A TELEPHONE MESSAGE FORM, BUT MAKE A NOTE IN YOUR DIARY OR CALL THE STAFF MEMBER'S ASSISTANT TO PROVIDE THEM WITH THE INFORMATION.**

NB: STUDENTS TO STUDY AN EXAMPLE OF A DETAILED AND A BRIEF MESSAGE ON PAGE 184 OF THE TEXTBOOK

UNIT 21.6: DEALING WITH CALLERS POLITELY

- Being polite means treating all callers in the same way regardless of their background, race, religion, gender or level of education.
- Always be respectful and willing to help
- Put a smile on your face and in your voice
- Listen attentively to the caller's request
- Use positive language and sound enthusiastic
- Ensure that each caller experiences the telephonic interaction with the organisation as a pleasant and professional experience.
- Following standard telephone etiquette means answering promptly, greeting the caller correctly, handling the call efficiently, not cutting off the caller, transferring the call successfully and taking messages correctly

Unit 21.7: Dealing with calls quickly

- Switchboard with multiple lines, **the operator faces the challenges of not forgetting a caller, not cutting a caller off,** and not transferring a call to the wrong office.
- Remember to **go back to the caller at regular intervals of approximately 20 seconds,** and offer to take a message if they have been holding for a minute or so.

Disclosable And Non-Disclosable Information

NB: It important to find out what the company policy states about which information may and may not be disclosed by its staff. It is possible again to be helpful as telephonist without disclosing confidential information.

A polite way to inform the caller you cannot give the required information is to say:

“I am sorry Mr De Klerk, but I am not authorised to give you this information, If you like, I can make an appointment with Mr, our General Manager, so that he can assist with your request’, or unfortunately I cannot disclose the information you request, I you wish I can transfer you to Mrs Kamalhah, our Administration Manger, etc.