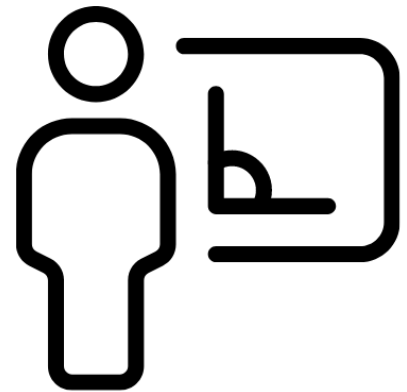


Instructors Guide



On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor for each lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.



*First learn the meaning of what you say –
then speak*

Epictetus

Module Two: Aspects of Phone Etiquette



Many people do not realize they have little or no phone etiquette. When they recognize this, they are often unsure about where to start. One of the first steps to gaining or improving a person's phone etiquette is to know the different aspects of it, such as phrasing and listening skills. Learning this knowledge can be a great starter tool for many people and can help them feel more confident on the phone right away.

Phrasing



When speaking on the telephone, different phrasing is used instead of our everyday casual phrases. Using more professional phrasing portrays a sense of confidence and a sense that you are there to help them. Using phrases such "Could you", "May I?", "Please", and "Thank you" can help the person on the other end of the line feel more comfortable and feel more at ease with your politeness. Important phrasing sections include introductions, transitions and even call conclusions. Although some of the phrasing can seem uncomfortable at first, with practice, they can become as natural as our everyday speech.

Examples:

- "How may I help you?"
- "Thank you for calling."
- "Could you repeat that name again?"
- "One moment while I transfer you."
- "May I take a message?"

Estimated Time	8 minutes
Topic Objective	Discuss the aspects of telephone phrasing.
Topic Summary	Phrasing Discuss how phrasing can differ from everyday speaking and telephone calls.
Materials Required	Flipchart/board and marker
Planning Checklist	None
Recommended Activity	Discuss with the class the different components of phrasing and vocabulary. Ask the group how our phrases change from our everyday speech and how we speak on the phone. Ask them why that is. Write some of their answers on the board/flipchart.
Stories to Share	Share any personal or relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	Why is phrasing important in telephone etiquette?

Tone of Voice



Our tone of voice can portray a variety of emotions and feelings. When we're sad or angry our voice can lower in tone; and when we're happy or excited it can raise higher. It is generally recommended that when we speak on the telephone, we should speak in our normal tone of voice, if not a few decibels higher. Lower tones of voice can imply sarcasm or disinterest. The speaker should never speak in monotone, which can sound bored and make the caller feel as though the speaker is not sincere. When possible, use inflection in your voice to help stress important points and give the caller verbal hints as to where the conversation is going.

Tips:

- Speak in a normal speaking tone of voice (or higher)
- Avoid lower tones or monotones
- Use inflection when possible

Estimated Time	7 minutes
Topic Objective	Discuss the effects on our voice tones.

Topic Summary	Tone of Voice. Discuss how tone of voice can affect our speech.
Materials Required	Flipchart/board, marker
Planning Checklist	None
Recommended Activity	Discuss with the class the different components of a tone of voice. Ask the group to discuss how tone of voice can alter how our words are heard. Why is this especially important on the telephone? Ask them why that is. Write some of their answers on the board/flipchart.
Stories to Share	Share any personal relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	How can our tone of voice effect how we speak on the telephone?

Speaking Clearly



When speaking on the telephone, the two callers cannot read lips or take notice of any sort of body language, so it's important to speak clearly and in a professional tone of voice. Do not speak too quickly, since it can cause your words to sound jumbled or rushed. However, speaking too slowly can make words sound distorted and can mislead the caller from what is trying to be said. As you speak, articulate your words and ensure you do not slur any sounds together. When you are finished speaking, pause periodically for signs that the caller has heard and understood you, such as answering the question or a simple "Mm hmm". If in the end they did not catch what you said, calmly repeat the information and try again.

Tips:

- Take deep breaths before each phone call
- Speak slowly – do not rush your phrases
- Pause for understanding from the caller
- Repeat words if necessary

Estimated Time	8 minutes
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Topic Objective	Review methods of speaking clearly on the telephone.
Topic Summary	Speaking Clearly Discuss the importance of having clear speech when speaking on the telephone.
Materials Required	Worksheet 1 - Improving My Speech
Planning Checklist	None
Recommended Activity	Complete the worksheet individually. Share your answers with the rest of the class.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	Why is it important to speak clearly on the telephone?

Listen to the Caller



With a telephone in our hand, we can often feel a sense of power and can feel the urge to perform all of the speaking – and forget how to listen. However, we forget that the purpose of the call is the person calling us to begin with. After you give your introduction, pause for a moment to listen for the caller to begin speaking and identify the purpose of their call. Allow the caller to finish speaking without interruptions. Focus on what the caller needs and what they are wanting. When

they are finished, reaffirm what they are wanting, which is sometimes referred to as active listening. Let the caller know what you can do for them and how you can help with their needs.

Estimated Time	7 minutes
Topic Objective	Review why listening is important on telephone calls.
Topic Summary	Listen to the Caller Discuss how to better listen to the caller.
Materials Required	Worksheet 2 - Improving My Listening Skills
Planning Checklist	None

Recommended Activity	Complete the worksheet individually. Share your answers with the rest of the class.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	How can actively listening help when speaking on the telephone?

Practical Illustration



Robert was taking calls for the clinic one morning. When the phone rang, he picked up the phone:

“Thank you for calling Dr. Smith’s office. My name is Robert. How may I help you today?”

The caller sounded upset and began to explain how he was waiting on a prescription from the doctor and still had not received it. Robert made sure that he did not interrupt the patient and waited for him to finish speaking. When Robert spoke again, he spoke in a calm and reassuring tone of voice. He told the patient that he would be able to connect him with the doctor’s nurse to help him with that. Robert waited for the caller to acknowledge what he said before proceeding to connect him to the nurse’s extension.

Module Two: Review Questions

1.) What is one benefit of using correct phrasing on a telephone call?

- a) Calls sound professional
- b) The call is completed quicker
- c) The customer is not bored
- d) *The operator can better persuade the client

When the telephone operator uses correct phrasing, the call sounds professional while the operator remains courteous and helpful.

2.) Which of the following is an example of correct phrasing?

- a) "What do you want today?"
- b) "Where can I transfer you to?"
- c) "How may I help you?"
- d) "Who do you want to speak to?"

Correct phrasing for telephone calls includes polite and professional requests, such as "How may I help you?" and "Would you like for me to connect you?"

3.) What is one tool that can be used to control tone?

- a) Volume
- b) Semantics
- c) Deep breathing
- d) Inflection

Inflection is a tool that is used to stress syllables of words, thereby adding emphasis to them. Inflection can be used to help control our tone by controlling what words we stress.

4.) Which of the following should not be used on a telephone call?

- a) Soft tones
- b) Monotones
- c) Inflection
- d) Raised tones

Monotones are speech that does not change tone. Monotones should not be used on the telephone since they do not express emotion or feelings.

5.) One technique that can help the operator speak clearly is to do what?

- a) Take deep breaths before each call
- b) Hang up if they make a mistake
- c) Speak loudly into the receiver
- d) Talk more often during the day for practice

By taking deep, relaxing breaths before each call, the operator is better equipped to control their speech and is more likely to speak more clearly.

6.) Which of the following should be avoided on the telephone?

- a) Soft tones
- b) Steady breathing
- c) Clearly pronounce words
- d) "Um" or "Uh"

Stammer words, such as uh or um, should not be used when speaking on the telephone. These words can make the operator sound unprepared and unprofessional.

7.) What is one tool that can be used to improve listening skills?

- a) Increasing the telephone volume
- b) Active listening technique
- c) Shortening the length of the call
- d) Writing on sticky notes

Active listening is a technique used to improve listening skills by mirroring and verifying what the caller has said and requested. This technique is commonly used in office environments.

8.) After their introduction, the operator should do what?

- a) Continue with the call
- b) Offer to transfer the caller to someone else
- c) Pause for a response from the customer
- d) Change their tone

After the operator has given their introduction, they should pause for some sort of response from the customer before continuing. Once the customer has acknowledged them, they can continue with the call.

9.) What are aspects of telephone etiquette ?

- a) Phrasing
- b) Listening
- c) A and B
- d) None of the above

The different aspects of telephone etiquette are phrasing and listening skills.

10.) It is generally recommended that when we speak on the telephone, we should speak in our normal tone of voice, if not a few _____ higher.

- a) Decimals
- b) Octaves
- c) Decibels
- d) Tones

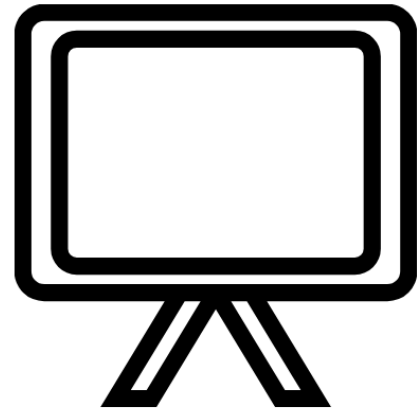
It is generally recommended that when we speak on the telephone, we should speak in our normal tone of voice, if not a few **decibels** higher.

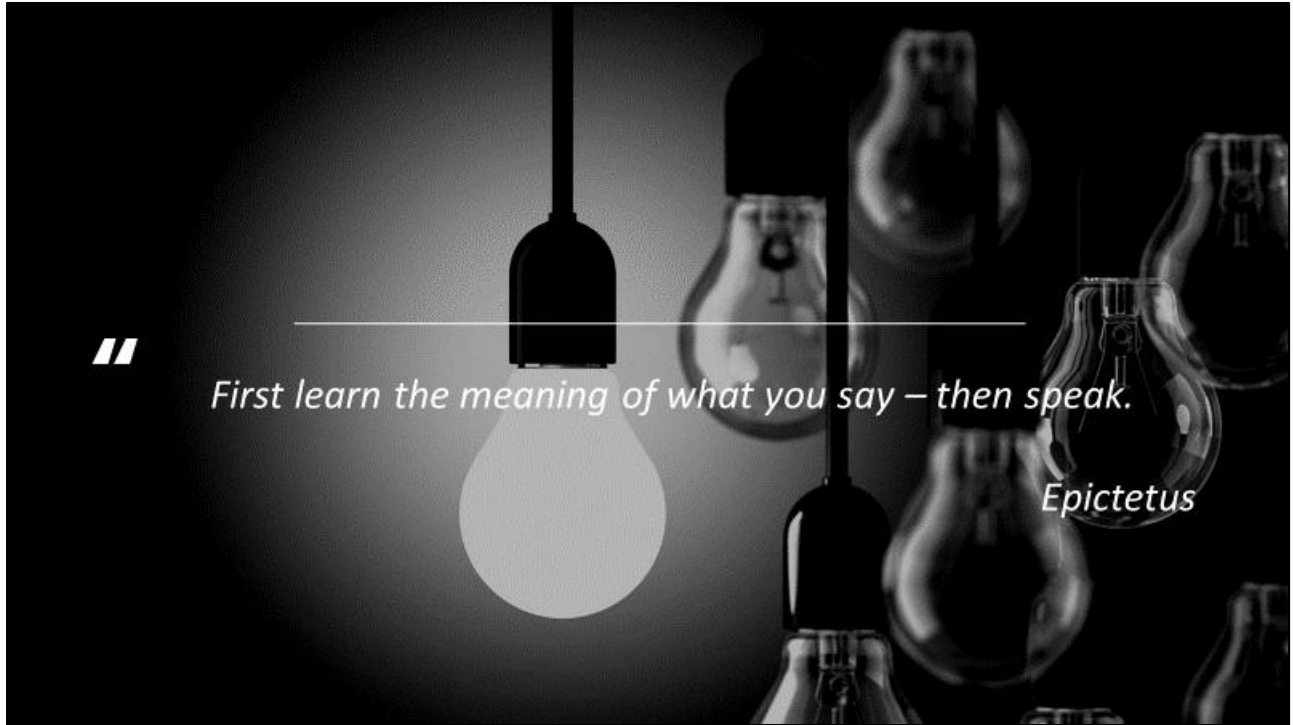
PowerPoint Slides



Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide.

PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.





MODULE TWO

Aspects of Phone Etiquette

One of the first steps to gaining or improving a person’s phone etiquette is to know the different aspects of it, such as phrasing and listening skills.



Phrasing

- “How may I help you?”
- “Thank you for calling.”
- “Could you repeat that name again?”

Tone of Voice

- Speak in a normal speaking tone of voice (or higher)
- Avoid lower tones or monotones
- Use inflection when possible





Speaking Clearly

Take deep
breaths

Speak slowly

Pause for
understanding

Repeat words
if necessary

Listen to the Caller

Allow the caller to finish
speaking without
interruptions.



Practical Illustration



- Phrasing
- Tone of Voice
- Speaking Clearly
- Listen to the Caller

Module Two: Review Questions

1. What is one benefit of using correct phrasing on a telephone call?

A. Calls sound professional

B. The call is completed quicker

C. The customer is not bored

D. The operator can better persuade the client

Quick Reference Sheets



Below is an example of our Quick Reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date. They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.



Telephone Etiquette Quick Reference Sheet



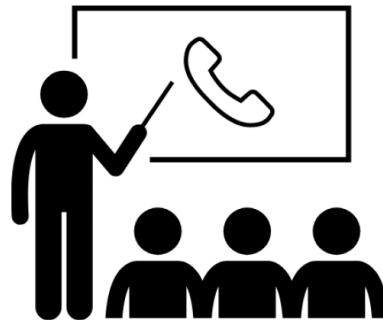
Proper Aspects of Telephone

Every environment we enter requires a different form of 'language'. For instance, we wouldn't enter a team meeting using the same type of language we might use in the break room. The same is true for the telephone. Telephone language is different from our everyday language and it can take some time to get used to its flow. But with the right tools, it can be easy to adapt in no time.



Training Employees

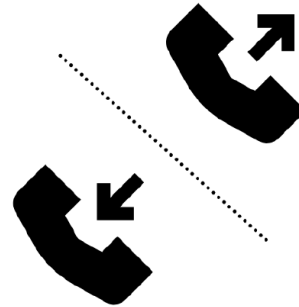
While having good telephone etiquette is beneficial, it will not do any good if it is not taught to the rest of the team. It is important to the company's success that every employee is properly trained and able to demonstrate telephone etiquette before being let loose on the telephone. Every employee learns differently, so it's helpful to have several methods available to allow employees to adopt these skills.



Handling Inbound/Outbound Calls

For many companies, inbound calls are a major part of the business. Customers call into the company for orders, consultations and to seek general information. Inbound calls can seem intimidating at times because we don't know who is on the other end of the line. But having the right tools, such as a proper greeting and key phrases, can help the telephone operator through any situation.

Outbound calls can be some of the hardest types of calls to make. They require the caller to be well prepared and be able to keep the 'target' engaged while trying to deliver a point. Feelings, such as nervousness and a fear of rejection, can make these types of calls seem daunting to anyone. But with some helpful techniques and a little practice, the caller will have no problems picking up the phone and dialing a number.



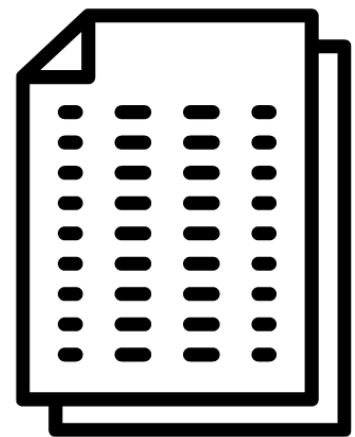
Handouts



Each course is provided with a wide range of worksheets.

Worksheets help check your participants' understanding. If a lesson calls for a worksheet, it will be listed in the Lesson Plan box under Materials Required. All worksheets are customizable and can be found in the Appendix of the Instructor Guide and the Training Manual.

As a trainer, icebreakers give your participants the opportunity to get to know each other better or simply begin the training session on a positive note. Icebreakers promote collaboration, increase engagement, and make your training more light-hearted and fun. Below is an example from the Icebreakers folder.



Sample Worksheet 1

Improving My Speech

Use the spaces below to make note of tips or hints you use to identify problem areas in your everyday speech. How can you improve them to make them telephone-ready?

Sample Worksheet 2

Improving My Listening Skills

Use this worksheet to outline some tips or techniques you can use to improve your listening skills.

- _____
- _____
- _____
- _____
- _____
- _____
- _____

NOTES

Icebreaker: Hello, My Name Is...

Option 1:

Method: Perhaps the easiest, most obvious and often overlooked icebreaker.

Ask each member of the training event to introduce themselves by saying *Hello – My Name Is...*

Then encourage the rest of the group to ask the trainee questions. To illustrate,

- Where do you live?
- What is your job?
- Where did you go to school?
- etc.

This exercise also encourages questioning and listening skills within the group.

Discussion Questions

1. Did anyone feel uncomfortable doing this exercise? If so, why?
2. How can this exercise help us during today's training event?

Time: Maximum time 15 minutes

Option 2:

1. Have the participants at each table answer the following questions:
 - a. Why are they here?
 - b. What is their level of experience with telephone etiquette?
 - c. What they hope to get from this class?
 - d. What is the most interesting thing they have ever done in their lives?
2. Have someone be designated a scribe and have them jot down the answers to question C above.
3. On a separate piece of paper, have them write down the most interesting thing done from only one table member.
4. Have the scribe hand the note with the answers to question C to you.
5. Have the scribe stand and introduce the table to the class.
6. Then have the scribe share the most interesting thing from their group.

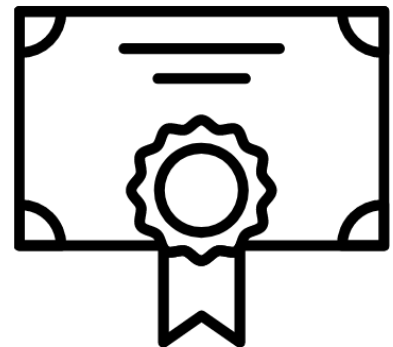
7. Have the class guess whom that person is, which did the most experiencing thing.
8. Go around to each table until all have given you their answers to question C and shared their most interesting thing.
9. Debrief by sharing all the answers to question C with the class.

Thank participants for sharing.

Certificate of Completion



Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.



CERTIFICATE OF COMPLETION

[Name]

*Has mastered the course
Telephone Etiquette*

Awarded this _____ day of _____, 20____

Presenter Name and Title
