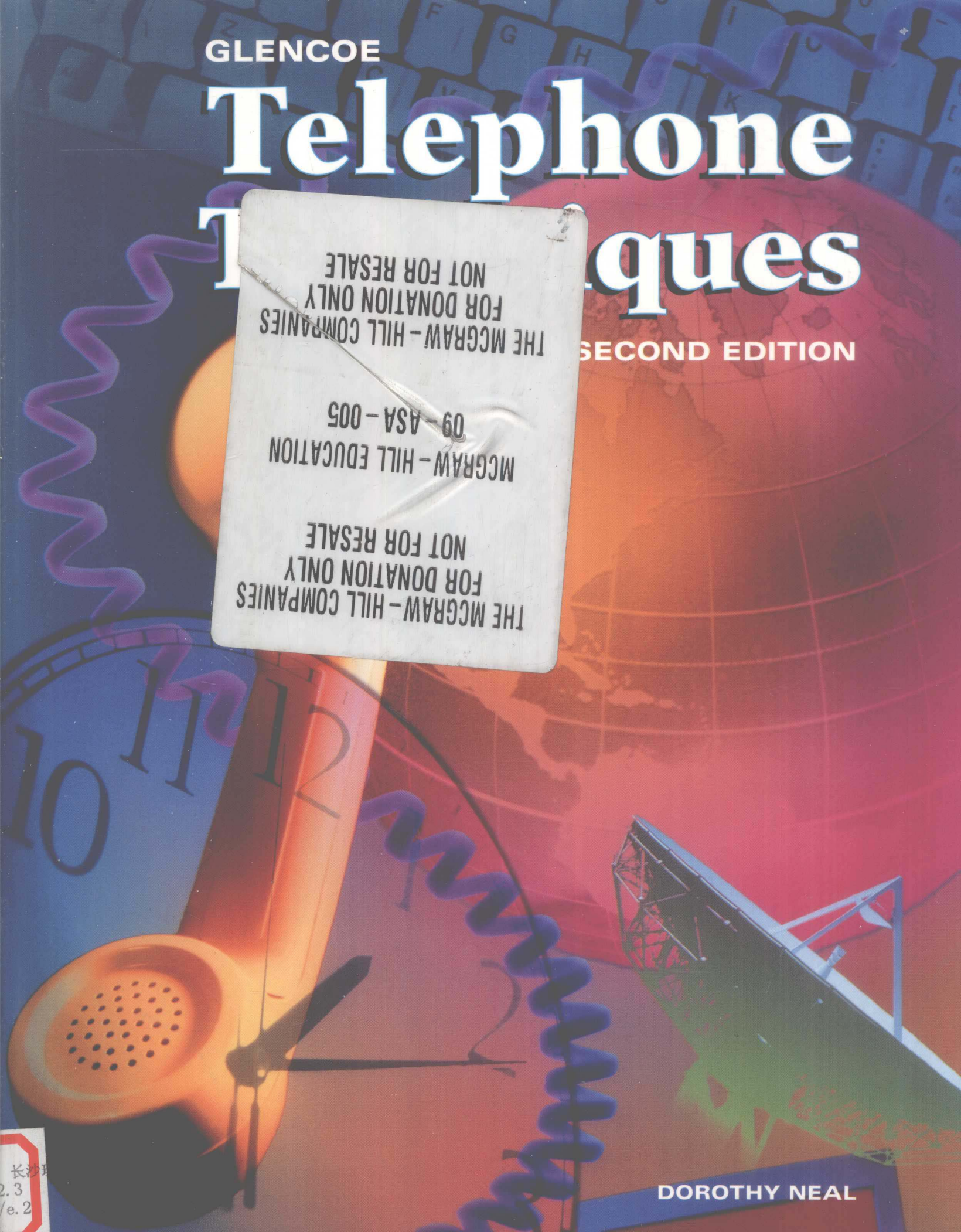
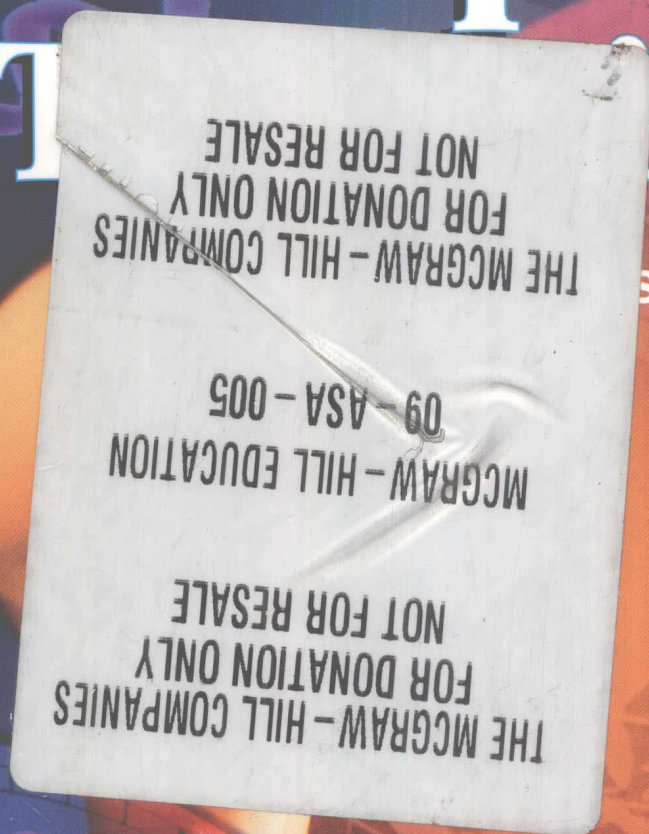


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# Telephone Techniques

SECOND EDITION



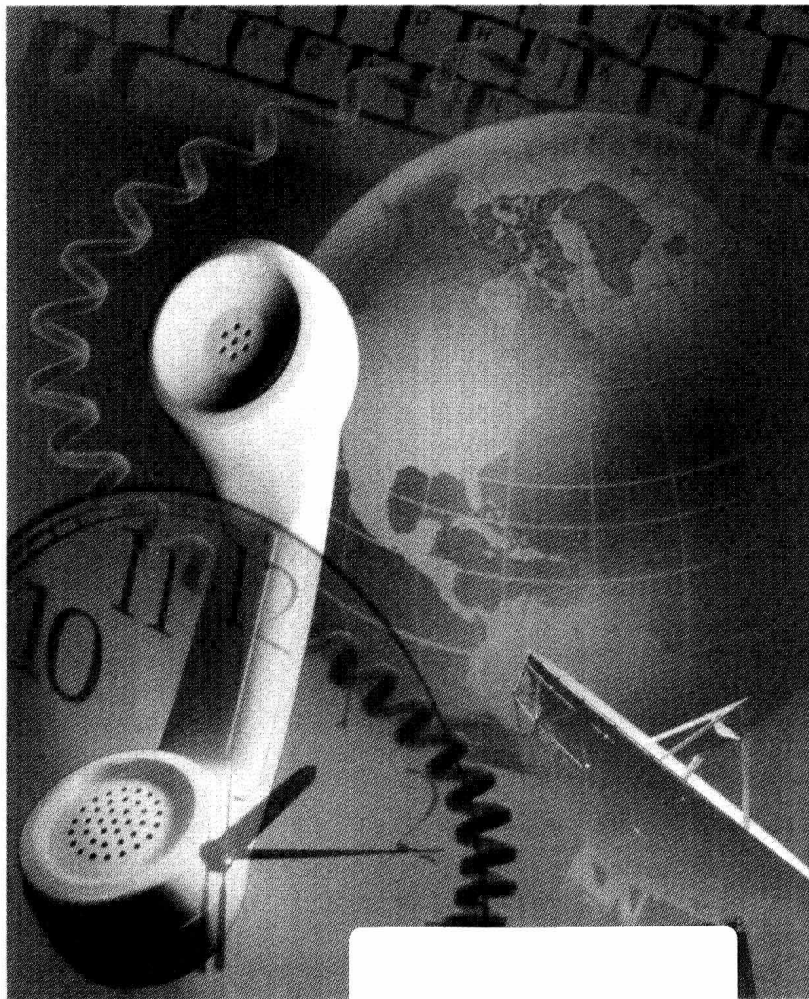
DOROTHY NEAL



**GLENCOE**

# **Telephone Techniques**

**SECOND EDITION**



**Dorothy Neal**

Instructor of Business Education  
Sacopec Valley High School  
Hiram, Maine



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*South Plains College*  
*Lubbock, Texas*

**Wanda Samson**  
*Fremont High School*  
*Fremont, Nebraska*

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### **Telephone Techniques, Second Edition**

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Send all inquiries to:  
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# Preface

The telephone is a vital tool for communication within our local areas and in the larger, global environment. We use the telephone daily to communicate with business associates and on a personal level. Communicating over the telephone can be a challenge when the other person is not in view. Thus, we need to develop telephone communication skill that is effective and positive when dealing with the public.

*Telephone Techniques, Second Edition*, will guide you to learn proper telephone use. The techniques you will study will help you develop and maintain professional relationships, a positive image for your company, and reliable service for your customers. *Telephone Techniques, Second Edition*, consists of a text-workbook, an instructor's manual and key, and a videotape.

**Text-Workbook** The text-workbook is divided into six chapters that focus on the following topics:

- Chapter 1: Developing Positive Telephone Communication Skill
- Chapter 2: Processing Incoming Calls
- Chapter 3: Making Telephone Calls
- Chapter 4: Managing Special Telephone Calls
- Chapter 5: Customer Service on the Telephone
- Chapter 6: Using Telephone Equipment and Technology

Each chapter opens with objectives, followed by an in-depth discussion of techniques related to the chapter focus. Notes in the margin contain important points and reminders. The sections with a colored background contain useful information that you may want to refer to repeatedly, especially on the job. The video icon appears beside many major topics to let you know these concepts are reinforced in the video.

The chapters contain numerous activities, as well as some self-assessments, to reinforce what you have learned. Material at the end of chapters includes a summary, one or more reinforcement applications, and a case study.

**Videotape** A 40-minute videotape reinforces the concepts presented in the text-workbook. The video is divided into four parts:

- Part 1: Developing Positive Telephone Communication Skill
- Part 2: Processing Incoming Calls
- Part 3: Making Telephone Calls
- Part 4: Customer Service on the Telephone

Worksheets are available to support the concepts covered in the video and to encourage learning through group discussion. Your instructor may choose to use the worksheets, which are found in the Instructor's Manual and Key, as class activities.

Enjoy using *Telephone Techniques, Second Edition*. With your constant attention and practice, you will develop positive telephone communication skill that you will use lifelong.

—Dorothy A. Neal



video icon

## **Dedication**

**T**his book is dedicated to Dr. G. W. (Jim) Maxwell, a long-time professional colleague, friend, mentor, and author. His outstanding telephone skills demonstrate excellence in all aspects of communication, especially his attentive listening. Thank you for your inspiration and support during the writing of *Telephone Techniques, Second Edition*.

—Dorothy A. Neal

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# ***Developing Positive Telephone Communication Skill***



## **OBJECTIVES**

**Chapter 1 will help you:**

1. Understand the importance of developing positive telephone communication skill.
2. Reinforce the importance of all aspects of communication skills, especially listening.
3. Ask effective questions when you are using the telephone.
4. Integrate the stages of a telephone call effectively for positive telephone communication.
5. Evaluate your own telephone skills and focus on specific areas that need improvement.



*Pretend that you are  
on stage performing  
each time you  
answer a call.*

*Your voice is you!  
Always speak  
positively.*

As technology advances, the telephone continues to be an important communication tool. It is used in nearly every business for a variety of reasons.

The world increasingly communicates by way of the telephone. Because of this, the need for strong telephone skills has never been more important. Learning how to refine your telephone skills can improve communication and goodwill in business. By evaluating your overall telephone skill and determining the areas that need improvement, you may develop more purposeful calls and achieve better communication via the telephone.

### ASSESSMENT 1: Assessing Your Telephone Skills

How good are your telephone skills? Complete the checklist below, trying to be as objective as you can in assessing your telephone skills. Keep in mind that the ultimate goal is to improve your telephone skills.

|  | Always | Usually | Seldom |
|--|--------|---------|--------|
| 1. I feel in complete control of every telephone call I make.              | _____  | _____   | _____  |
| 2. I answer the phone in a pleasant manner, always identifying myself.     | _____  | _____   | _____  |
| 3. Before I begin the call, I have the necessary materials in front of me. | _____  | _____   | _____  |
| 4. I use effective questioning skills.                                     | _____  | _____   | _____  |
| 5. The tone of my voice is pleasant.                                       | _____  | _____   | _____  |
| 6. I try to practice active listening.                                     | _____  | _____   | _____  |
| 7. I screen calls, when necessary, in a professional manner.               | _____  | _____   | _____  |
| 8. I never leave callers on hold without getting back to them shortly.     | _____  | _____   | _____  |
| 9. I use message forms for completing messages when appropriate.           | _____  | _____   | _____  |
| 10. I use telephone directories to assist me in preparing for calls.       | _____  | _____   | _____  |

11. I am sensitive to international time zones when making calls. \_\_\_\_\_
12. I use various telephone options, such as call forwarding and call waiting, when appropriate. \_\_\_\_\_

## THE COMMUNICATION PROCESS

Assume that you need feedback from a coworker who is a team member on a very important project. You phone her and she answers immediately, but you sense by the tone of her voice that she is in the middle of a problem. When you ask whether this is a good time to speak with her, she replies that she will call you back shortly. Then you hang up.

What role does communication play in this situation? The tone of your coworker's voice has sent you a verbal cue that a problem exists and this is not a good time to speak with her. You have demonstrated sound listening skill and good judgment by responding quickly to the tone of her voice.

**Communication** is the process of exchanging ideas and messages either verbally or nonverbally. Communication consists of four major parts: speaking, reading, writing, and listening—with listening being the most important. Figure 1-1 shows the process of communication. Using the telephone requires you to verbally communicate a message or to receive a message. When a message is not conveyed as it is intended or is not interpreted as it should have been, miscommunication occurs. Practicing each part of communication conscientiously will help you avoid miscommunication.



Figure 1-1 The four segments of the communication process interact.

Much communication is visual, and you look at the other person for clues about the message. Is the person looking you straight in the eye? How is the person dressed? What does the expression on the person's face tell you? Communicating on the telephone, however, differs from communicating face-to-face: you cannot see the other person or party. Since you have no visual clues to understand, you can only listen to the speaker's voice. The person to whom you are speaking also depends on you to speak in a way that will enable both of you to understand. The fundamental skills of speaking and listening are important to prevent any miscommunication or confusion.

### ACTIVITY 1: Communicating Without Seeing

*The purpose of this activity is to help you understand the effect of not being able to see someone with whom you are communicating, which happens when you are talking on the telephone. Select a partner for this activity. Turn your backs to each other, and have a short conversation about the best thing that has happened to each of you thus far today. After you have completed that conversation, turn around and face each other. Then, talk to each other about the worst thing that has happened to each of you today. After you have completed this activity, answer the following questions.*

1. Was it easier to communicate when you were back-to-back or face-to-face? Why?

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---

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2. What voice clues did you use to help you understand what your partner was saying when you had no visual contact?

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3. What visual clues did you use to help you understand what your partner was saying when you were face-to-face?

---

---

- 
- 
- 
4. What did you learn about communicating with no visual contact that will assist you when you are using the telephone?
- 
- 
- 
- 
- 

## **SPEAKING**

When you speak on the telephone, you cannot use your appearance, posture, eye contact, and gestures to help convey your message. Your voice must do the job.

A good voice is pleasant to listen to because it communicates a positive message. Keep in mind the following qualities of a good voice:

***Appropriate Volume*** Speak so that your voice is neither too loud nor too soft. Use changes in volume to emphasize important information.

***Comfortable Rate*** Speak slowly enough so that the listener has a chance to absorb your message without your having to repeat it. Keep in mind that as you speak the other person may be writing notes.

***Correct Pronunciation and Enunciation*** ***Pronunciation*** is the correct way to say a word. ***Enunciation*** is the clarity with which you speak. To avoid mispronouncing words, you may wish to check the pronunciation of unfamiliar words in the dictionary before you use them. Enunciate your words clearly as you speak.

*Be aware that people with an accent or dialect unlike yours may not understand your pronunciation of some words.*

People with an accent or dialect unlike yours may not understand your pronunciation of some words. You also may not understand the pronunciation of some of their words. In these instances, careful pronunciation and clear enunciation are very important for effective communication. You may need to repeat or spell words that are unusual or misunderstood.



## ACTIVITY 2: Pronouncing and Enunciating

*The purpose of this activity is to reinforce the importance of pronouncing and enunciating words correctly. Select a partner for this activity.*

### Section 1

*Read aloud the following list of words while your partner listens for correct pronunciation and enunciation of each word. Then reverse roles.*

1. library
2. Amarillo
3. message
4. affect
5. comparable
6. compromise
7. laboratory
8. hoarse
9. experience

*After both of you have completed Section 1, evaluate your overall pronunciation and enunciation techniques. In which areas did you make note of needed improvement?*

### Section 2

*List below five words that you have difficulty pronouncing or enunciating. Use a dictionary to check the pronunciation of the words, if you wish. Practice saying each word aloud until you pronounce and enunciate it correctly.*

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**Positive Tone With a Pleasant Pitch** The *tone* of your voice conveys your attitude, or manner of expression, in speaking. *Pitch* refers to the variation in your voice. It is difficult to listen to people with high-pitched, low-pitched, or monotonous voices. Vary the pitch of your voice in order to make it interesting and pleasant to hear.

## SPEAKING TECHNIQUES

**Stay Alert.** Focus on the telephone call; it is easy to be distracted by what you see around you. Pay attention to what you say and to what is being said to you.

**Speak Directly Into the Telephone.** Hold the mouthpiece of the telephone an inch or two directly in front of your lips. Speak clearly and friendly, smiling as you speak. Keep objects such as gum, food, and pens or pencils out of your mouth.

**Adjust Your Volume.** Speak so that the listener can easily hear you. The quality of telephone connections can affect the listener's hearing level. You may need to speak more loudly or more softly accordingly.

**Listen to Yourself.** Be aware that certain factors can affect your voice. If you have a cold, you may have a nasal sound in your voice. If you are upset, you may speak faster. If you have an accent or a distinct dialect, you will need to speak slowly enough for the listener to understand.



Figure 1-2

## READING AND WRITING

Another important part of telephone communication is being able to read, record, and interpret telephone messages successfully. You should ALWAYS be prepared to record any information that may be needed for future reference. Write messages clearly so that they can be read quickly and responded to appropriately. (Reading, writing, and interpreting messages will be covered in greater detail in later chapters.)

## LISTENING

Although the four parts of communication must work together, none is more important than listening when you are using the telephone. Think about the last time you used the telephone. How much of that time did you spend listening?

The saying that "Many hear but few listen" is very true. Listening combines both physical and mental skill. It also implies that you heard what someone said and you understood by responding.

**The Listening Process** Listening involves four related steps: sensing, interpreting, evaluating, and responding.

- **Sensing** means you are aware that someone is saying something to which you need to listen. If sensing does not occur, the listening process never begins.

*Stay focused when listening.*



- **Interpreting** involves identifying what is said and explaining the speaker's meaning. Although you may hear the words, you can inaccurately explain the message if you do not understand the words as the speaker intended. Because individuals think differently, care must be given to avoid misinterpreting a message. Your knowledge, personality, experiences, and personal interest in the subject all influence how well you interpret what you hear.
- **Evaluating** forces you to think about the whole message and draw conclusions about the content and the way in which you will respond.
- **Responding** requires you to make a statement verbally. Study Figure 1-3 to see how the four related steps are integrated.

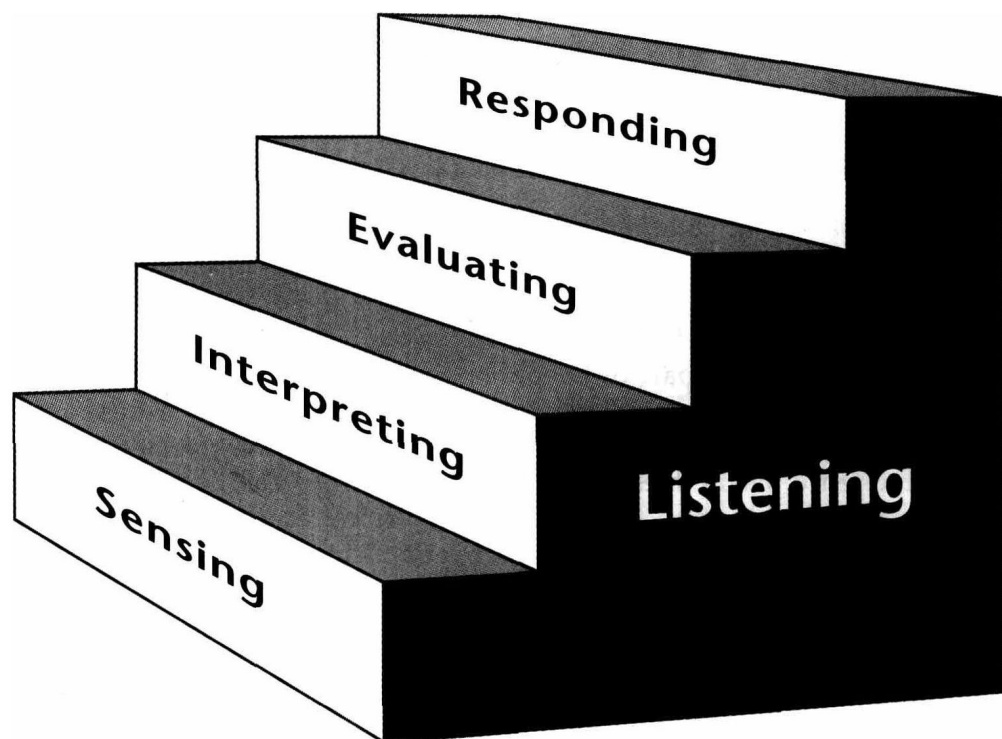
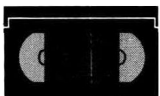


Figure 1-3 Accurate listening is based on the four interdependent steps of the listening process.



**Active Listening** When you use the telephone to communicate, you must practice active listening. Active listening means that you hear words and thoughts, then respond to them. For example, if you are asked a question during a telephone conversation, you are expected to give a response. The need to respond to the question gives you a particular reason for listening.

### ACTIVITY 3: Listening Skill

*The purpose of this activity is to help you focus on your listening level when using the telephone. Read and respond to each statement by placing a check mark in the appropriate column. Try to be honest about your current level of listening when you are using the telephone.*

|   | Always | Sometimes | Never |
|---|--------|-----------|-------|
| 1. I try to listen for facts.   | _____  | _____     | _____ |
| 2. I try to concentrate on main ideas.                                  | _____  | _____     | _____ |
| 3. I try to give appropriate feedback.                                  | _____  | _____     | _____ |
| 4. I try to always be prepared to listen when I am using the telephone. | _____  | _____     | _____ |
| 5. I take notes.  | _____  | _____     | _____ |
| 6. I avoid distractions.  | _____  | _____     | _____ |
| 7. I ask questions when necessary.                                      | _____  | _____     | _____ |
| 8. I avoid making premature conclusions.                                | _____  | _____     | _____ |
| 9. I try to avoid interrupting the other party.                         | _____  | _____     | _____ |
| 10. I try to practice telephone courtesy.                               | _____  | _____     | _____ |

*Total the check marks in each column. Strive to improve your listening level so that you can answer "always" for each of the above experiences. Remember, all your listening experiences on the telephone should be positive experiences.*



Why do people not listen as well as they should when using the telephone? Many have never learned to listen to conversations. They may have different interests or limited knowledge. Often they may model their telephone listening skill after coworkers or others whom they have heard speaking.

As you improve your listening skill, you will become more knowledgeable. In addition, you will gain confidence in dealing with people and difficult or sensitive situations. Improved active listening skill can result in improved work performance and an increased sense of self-worth. Try to always keep a positive attitude recognizing that everything you hear may not be positive.

#### ACTIVITY 4: Positive and Negative Telephone Talk

*The purpose of this activity is to help you evaluate comments spoken over the telephone as being positive or negative. Place a check mark in the Positive column if you think the comment is positive, or in the Negative column if you think it is negative. Be prepared to justify your answers. If possible, read these comments aloud with a partner. Notice how using different tones of voice positively and negatively affect listening when you are using the telephone.*

|  | Positive | Negative |
|--|----------|----------|
| 1. "When will you make a decision about whether you will go to the conference? Don't you think it is about time you did?"                | _____    | _____    |
| 2. "The Advertising Department must have quoted you the wrong price. Hold on, I'll transfer you."  | _____    | _____    |
| 3. "Our records show that your balance is \$5329.10. When do you plan to make a payment or let us know how you plan to pay the balance?" | _____    | _____    |
| 4. "It will be a pleasure to speak at the meeting in Omaha on March 23. I'm thrilled you invited me."                                    | _____    | _____    |
| 5. "Please don't shout at us. We were not responsible for that decision."  | _____    | _____    |
| 6. "I absolutely will not do as you requested. That is a ridiculous idea."   | _____    | _____    |