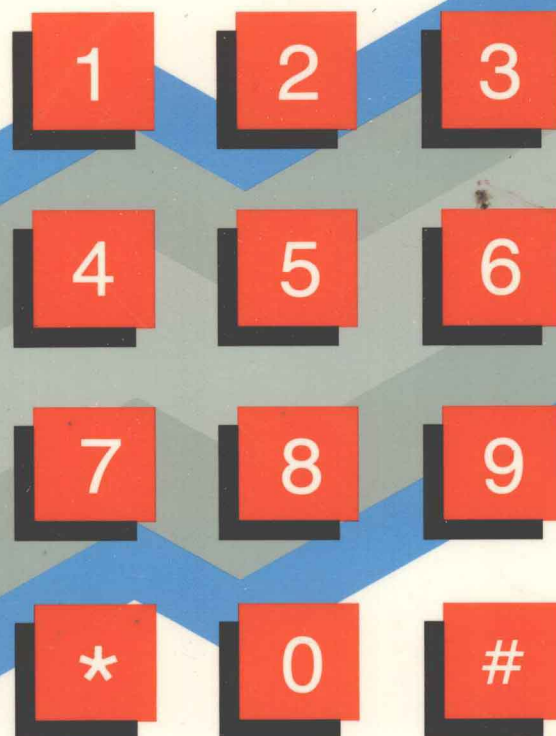


# TELEPHONE MASTERY



Skills for Business Productivity

MARY PEKAS

# TELEPHONE MASTERY

## Skills for Business Productivity



by  
Mary D. Pekas



**PARADIGM**

Consulting Editor: **Dr. Rosemary T. Fruehling**  
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Cover Design: **Steve Lundgren**  
Illustrations: **Alice Porter**, p. 13  
©Dynamic Graphics, Inc., pp. 6, 33, 44, 48, 83, 95  
Davis Oldham, pp. 55, 72.

Library of Congress Cataloging-in-Publication Data  
Pekas, Mary D.  
Telephone mastery.

1. Telephone in business. 2. Telephone selling.

I. Title.

HF5541.T4P45 1989 651.7'3 89-10823  
ISBN 0-574-20190-4

© 1990 by Paradigm Publishing Inc.  
Published by: **EMCParadigm**  
875 Montreal Way  
St. Paul, MN 55102  
(800) 535-6865  
E-mail [publish@emcp.com](mailto:publish@emcp.com)

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Printed in the United States of America.

1098765



Introduction

# Telephone Mastery



**T**his course provides a solid foundation for students who want training in the professional use of the telephone. The telephone is our major instrument of communication today in our business and personal lives. We use the telephone to communicate not only over distance, but between offices in the same building and company.

It is a rare business that can operate without the use of a telephone. Not only is the telephone essential for the orderly and successful conduct of most businesses, it is for many the prime method of contact between them and their clients or customers, both actual and prospective. If this telephone contact is pleasant and successful companies prosper. If it is unpleasant and unsuccessful, companies fail.

Because the telephone is such a familiar piece of equipment and in common use in nearly every household as well as every business, the assumption often is made that no special training in its use is required. This assumption is not justified.

Most of you can easily think of a time when you have called a company for service or information, only to be met with indifference, a discourteous tone, a know-nothing, care-less attitude. Or a situation in which the person answering said the company name or department so rapidly and in such a bored monotone, you could not be certain whether you had reached your intended number. And, upon asking for clarification were met with an irritated blare.

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## Telephone Skills Needed

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People in business cannot afford to ignore their telephone skills. A company that spends thousands or millions of dollars in advertising to establish an image would be foolish indeed to ignore the manner in which its people use the telephone. Small companies that do not spend large sums on advertising to create an image must rely not only on the service or product they offer but the image of them created by the people who answer their phones or make their calls.

A successful career in almost any type of business requires telephone skills. Those who master the telephone will increase their value as employees or as potential hires.

Even in the personal use of a telephone at home—for pleasure or business—we can all benefit from improving our telephone techniques.

This course is based on a system of training that was developed during 20 years of professional telephone experience by Mary Pekas, president and founder of Telemarketing Institute, Inc. Clients of Telemarketing Institute include Northwestern Bell, Honeywell, Northwest Banks, Lutheran Brotherhood, General Electric, and Nielsen Market Research.

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## **A Natural Style**

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**xi**

Ms. Pekas emphasizes talking on the phone in a natural, friendly manner, as you would face-to-face with a friend. This approach teaches the use of positive voice qualities to project a genuine, service-oriented attitude.

People sometimes feel uneasy using a telephone, partly because of the lack of a visual image. The missing visual image must be replaced by skills that many people have not developed highly—the skill of using one's voice effectively.

Using your voice effectively involves developing a positive attitude as well as selecting the right words. It means articulating the words correctly and clearly, and, in particular, pronouncing the other person's name correctly. It involves projecting interest in your tone and it also involves the important art of listening. Understanding the need to compensate for the missing visual image to inject the human element into telephoning is a first step toward developing professional telephone techniques.

Drawing on her many years of telemarketing experience, the author developed a system that emphasizes the human element. People using this system create a non-pressure, friendly call atmosphere. The style requires integrating the skills of conversation and listening. The course also teaches essential mechanical techniques, such as the necessity of having a neat work area, the need to answer ringing phones promptly, the understanding of telephone numbers, and the use of telephone books to keep costs down.

Whatever business you are in and at whatever level, this course will help you become a more effective user of the telephone. Even if you only use a telephone at home, you will benefit from this course for those times when you make personal business calls—to get information about a product, to check with your city or town hall about a matter significant to you. The telephone is an important tool that you will use often. Learn to use it well.

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## **Performance Skills Checklist**

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Note that there is a checklist of performance skills in Chapter 9. You can use this in several ways. You can monitor your progress as you study the material in this course. You can keep the list handy as a reminder when you are at work. It could also be interesting to turn to the checklist first and quickly check off the telephone skills you think you have and then compare your skills at the end of the course.

There is also a glossary of special terms. The number appearing in parentheses after each entry is the number of the chapter in which the term first occurs.

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## Chapter One

# Using Telephones in Business

Upon completing this chapter you will be able to:

- ① *recognize telephone benefits and drawbacks,*
- ② *identify three factors on which professional telephone skills depend,*
- ③ *recognize that appropriate telephone skills are applied in different situations,*
- ④ *identify three reasons why professional telephone skills are important.*



**O**f all communication devices, telephones are still the most often used in the modern business office, the first things to be installed after the electricity and plumbing. This is true even though many other ways to communicate over telephone wires exist—*fax (fac-simile) machines, modems, telexes*. For many people and businesses, telephones long ago replaced the written note or letter for communicating over short as well as great distances. Whether you are at work or at home, telephones play a role in your life. Knowing how to use them effectively is important.

Despite the fact that telephones are everywhere and we all use them, not every one uses them well. People have strong feelings about the phone. Some people hate them, finding them intrusive and impersonal. Others feel lost without their telephone link to the world. Some people are uncomfortable on the phone. They miss the visual contact. They want to see the person with whom they are talking.

Some people are naturals using the phone. If you were to watch and listen to them talking on the phone, you might be able to analyze what they do and learn ways of working with the phone. This book will help you analyze what makes an effective telephone user and sharpen your telephone skills.

Whenever you use a phone, either at home or at work, you want to project an agreeable telephone personality. At work it is important because when you use the phone on your job, you are not only speaking for yourself; you are representing the company. The image you project is the company's image to the person on the other end of the line. If you project a negative image, the person may decide not to continue doing business with your company.

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## **Recognizing Telephone Benefits and Drawbacks**

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Many people have mixed feelings about the telephone, even though it provides many benefits, such as being able to dial a number and get information on anything from what is showing at the movies to whether a store has a product you want. Following the phone company's slogan,

“Let your fingers do the walking...” can save you a great deal of time and frustration.

Other benefits include allowing you to socialize at a moment’s notice with friends and keep in touch with family. If you need information at work, you can call a coworker or client. You can take an order or give someone directions. It is the best and quickest way to reach an emergency service, such as an ambulance or fire company. It is a wonderful tool, and seems to be indispensable for modern life.

However, the phone has its drawbacks as well. We have all had the experience, at home and at work, of feeling exasperated at times at the interruptions the phone brings into our lives. We are able to do with a phone what we would never do in person: open the door of a house or office, walk right in, and ask to be spoken to regardless of what the other person is doing. Because of this, it is important to learn how to place and receive calls to minimize the annoyance and enhance the benefits of business telephone use.

Another drawback is that the phone does not produce a written record to refer back to after the conversation is over. Effective phone use therefore involves knowing how to take written messages, notes, and other important information.

Most businesses have procedures that specify how certain tasks are to be accomplished. Part of your job training will include learning your company’s procedures for the telephone, which will help you to realize the benefits and deal with the drawbacks of phone use.

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## **Defining Professional Telephone Skills**

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Any time you pick up the telephone receiver and dial a number, you begin a series of activities that can be considered telephone skills. In general, the skills you use during a call depend on three factors:

- ✓ the telephone equipment,
- ✓ the kind of call you are placing or receiving,
- ✓ your personal attributes—voice, knowledge, and attitude.

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### ***Telephone Skills and Equipment***

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Some telephone skills are mechanical. You will need mechanical skills simply to use correctly the particular kind of phone equipment you have. Along with some of these pieces of equipment come special dialing requirements for inside phones and extensions; for placing direct

long distance calls or local outside calls. It is important to become familiar with 800 numbers, area codes, and time zones.

When you first take a job, part of your orientation to the company will be learning the mechanics of using the phone system. You will probably learn these telephone skills quickly and easily. If your company has a cumbersome system that makes it difficult for you to transfer inbound calls, or you spend a lot of time on the phone without an appropriate headset, you may have to develop telephone techniques to overcome these difficulties.

## **4**

### ***Telephone Skills and Various Kinds of Calls***

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Selling, receiving or making complaints, arranging appointments, sending or receiving information, and just being friendly are all tasks accomplished via a phone call. Each task requires a different approach or skill. For example, selling requires you to be well-informed about a certain line of products, to be persuasive, and to place many follow-up phone calls. Handling a complaint requires you to develop assertiveness, patience, and diplomacy.

You will read of many of the different kinds of calls you may have to handle in business. Each has its own techniques for placing or answering, concluding and closing. You may be required to learn how to get past a protective secretary or you may be a protective secretary.

Many companies have definite procedures to follow for different phone situations. The most common is the greeting. Each company wants its name mentioned, and many require that the person answering the phone give his or her name: "Good morning, this is Acme Tools, Bill Jordan speaking."

There may be procedures for handling certain types of calls. Calls for information are handled one way; complaint calls are handled another way. The company may prefer certain people to be spokespersons: "Ms. Brown handles these questions. Would you please *hold* while I *transfer* your call?"

### ***Your Personal Telephone Skills***

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Because it is true that anyone who answers the phone *is* the company to the caller, what you know and how you express yourself becomes a reflection of your firm. Your voice is the only impression callers receive of you—and of the company. You already have a telephone personality. Whenever you use the phone, your manner, voice, and techniques reflect your personality. For informal, every-day use of the phone between friends, your personal telephone style is probably adequate. In



the business world, and for some personal business calls, you may find that you need to develop other techniques.

Your personal telephone skills depend on your knowledge and experience, how much you know about your company's business, the grammar you use. Your telephone manner will be affected by how you use your voice and body, the tone of your voice, and your attitude toward the person who called or is being called.

Many of us take our voices for granted and never consider how they might sound to another, especially when transmitted electronically. You have no doubt seen the comic characterization of the whiny, nasal-voiced operator who exaggerates pronunciation. It is funny until that grating voice comes flying over the wire into your ear.

Vocal habits such as inflection, pronunciation, the pauses you use all affect your telephone techniques. How you sit, breathe, and even the expression on your face affect how your voice sounds over the phone. Your voice reveals your moods and attitudes—sometimes without your realizing it. When you are annoyed at the phone ringing, it is all too easy to sound abrupt and irritated when you answer. On the other hand, exaggerated and insincere friendliness is as noticeable and will block communication as much as an unpleasant approach.

Becoming aware of how your voice represents your attitudes is the first step to learning how to manage your verbal expression for more successful telephone techniques.

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## Applying Telephone Skills

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Everyone working in a business needs to know how to use the phone effectively, no matter what the nature of the business is, what size it is, or where it is located. The telephone is an important tool to communicate to others within one company and outside. Different situations require phone skills appropriate to each situation.

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### *Business is Conducted Over the Phone*

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Obvious situations where the telephone is used include the receptionists' desk, and the customer service department. Here is a short list of other places where people use the phone to conduct business.

- ✓ The sales person in a store handles calls from customers who want to know if the store carries certain items.
- ✓ The auto mechanic handles calls from prospects who ask questions about their car and arranges appointments for services.