



## **Module 5 : Telephone skills as a PA**

- How to make phone calls and speak in a professional tone
- Tips on how you should communicate with people over the phone
- Mistakes that should be avoided while communicating on the telephone
- How to conduct business and represent your company over the phone

Telephone skills are crucially important to the success of any business. Customers often form an opinion - or even judgment - of your company based on a single phone call. Poor telephone skills leave a negative impression on your company and this opinion may prove difficult to overcome.

Senior management often depends on competent PAs to attend to phone calls and screen callers. Presenting a professional image is equally important in person as well as on the telephone.

### **In this module you will learn:**

- How to make phone calls and speak in a professional tone
- Tips on how you should communicate with people over the phone
- Mistakes that should be avoided while communicating on the telephone
- How to conduct business and represent your company over the phone

### **5.1 Introduction**



**The first step towards learning telephone etiquette involves consistency.**

Telephone communication forms an integral portion of your job profile as a PA. Thus, developing effective communication skills will help you attain success and will help reinforce professional relationships.

A PA will deal with people all day long and most of them will communicate over the phone. You may wish to learn phone techniques and can even try practising with dummy calls before putting your skills to practical use at the workplace.

Every phone call is potentially important as it may lead to further business or the cementing of an important customer relationship. Phone calls are the starting point of every prospective deal.

The caller is able to discern a smile, a friendly attitude and professional vibes clearly on the phone - as clearly as they would if they communicated face-to-face with you.

Your voice tone, response and communication over the phone are all considered a reflection of the brand you work for. As a PA, your communication skills reflect the values of your company.

**Outside input**

You should ask a friend or colleague to help you practice a few times with a pretend business call. Request them to give you feedback on your voice, tone, content, etc.

Observe your phone etiquette with objective clarity. Do you lack clarity and articulation? You will not notice these things but other people will - so get somebody to help you with some practice calls!

Train yourself and start from the beginning of the call. Focus on your greeting and the speed of your response to a ring. Every factor contributes to the impact on the other person's impression of you and determines the overall phone call experience.

## **5.2 Why Phone Calls are considered Lifelines for a Business**



### **Customers still prefer verbal contact with a business before transacting.**

While emails, websites, online contact options are popular, research indicates that talking to the company is still the most preferred choice. Communication over the phone is the easiest and most effective way to conduct business.

### **FACT**



39.2% of sales development reps say phone calls are the most successful in getting responses

*Source: pavilion*

Inbound phone calls are a huge source of potential revenue and sales for a business. PAs will often be required to attend to phone calls before transferring the call to the boss.

Customers often call the business to request information that they were unable to find on the website.

## FACT



41% of customers prefer a phone call to resolve customer issues.

*Source: hiya.com*

Neglecting phone calls or poor responses may drive prospective customers to the competition.

The initial phone call with a client is an excellent platform to set the tone and pattern for future interactions with the customer. As a PA, your phone skills pave the way to establish a reputation for professionalism and efficiency. The customers in turn become more confident of your ability to satisfy their needs and requirements.

All these factors indicate that phone communication and etiquette is an extremely critical component for business success. Phone calls should be attended to with a combination of courtesy and confidence. Employees must be able to engage with the customer in a way that indicates a sincere interest in their requirements.

It's important to understand that it's not only prospective customers who make phone calls; existing customers may call too.

The very fact that they are calling indicates that they require assistance or support with their queries or complaints. Poor phone communication with existing customers may lead to significant loss of business.

Phone contact and communication helps build the brand image of the company. Google online research reports indicate that 47% of customers will look for alternatives if there is no phone number listed on the website.

The initial and subsequent phone calls help the customer form a perception of the brand.

As a PA, you could face a wide range of situations during a phone call. The call may involve a request for a meeting with your boss or it could be a disgruntled customer demanding a refund.

Business phone communication will often involve thinking on your feet and coming up with intuitive responses. You will often find yourself placating an angry customer, and skilled phone communications will help reinforce brand loyalty.

## Activity 1 - Practise Using Phone Skills

*Estimated time: 10-15 minutes*

Telephone skills are a critically important skill in your job as a personal assistant. Good telephone communication skills can help you create loyal client relationships for your company.

To ensure that you are ready for a job as a personal assistant, you should have plenty of practice on the phone. For this activity, use your newly learned phone etiquette tips to call a friend or family member. How should you begin and end a conversation? Is there anything you should take into consideration regarding your tone or how you address the person?

## 5.3 Important Phone Etiquette and Skills



**In most cases, you should try and pick up the phone within three rings.**

If the time lag extends beyond three rings, it could be perceived as a delay in response.

While you should respond quickly, avoid answering with an impatient or harried tone of voice. At the same time, avoid startling the caller with an abrupt response (it's common to come across employees who rattle off the company name at top speed). Be calm and speak with clarity. The caller should not get the impression that you are simply trying to 'finish' off the call and move on to the next job.

Many callers find it annoying when people answer the phone and automatically say who they are. However, as a business representative, you need to inform each caller about the number that they have reached. Then pleasantly tell them your identity, after which you could follow up with asking how you can help them. Make your caller feel welcome and let them know they are in safe hands with somebody who is willing to serve them.

A phone call is almost like a story in that it needs a beginning, middle and an end. A good call can be ruined by a poor ending; don't sound like an automated service. Make an effort to sound sincere and interested while engaging the customer over the phone.

## 5.4 Evaluating Length of calls



**Remember the length of each call is important, you have other work to tend to, but this is the most pressing matter.**

Do not sound in a rush to get off the phone and give each person as much time as needed to answer all their queries as efficiently as possible.

At the same time, after the initial pleasantries, avoid idle chitchat and attend to the caller's requirement. Evaluate appropriate call lengths and follow company guidelines in order to maintain consistency of standards. Every call may vary in length.

## 5.5 Additional Phone Etiquette Tips

- Before you begin the conversation, make sure that the phone instrument is correctly positioned near your mouth. Otherwise the caller may be able to catch only the tail end of your sentences.
- Use insight and intuition to identify the different types of phone calls that you normally receive. Write these down and focus on training that helps you deal with different situations on the phone.
- It's important to sound friendly, interested and reassuring on the phone. Tone of voice makes a significant impact on customer interactions.
- While attitude is extremely important, it must be backed up with solid technical or product knowledge. If you are unable to satisfy the customer's queries, then transfer the call to someone who can.
- Make sure that your language is respectful and formal at all times. For example, instead of saying, 'Just one second', replace it with 'May I please place you on hold?'. Avoid asking, 'Who is this?' and rephrase it to, 'May I ask who is calling please?'

- Remember to modulate your tone of voice while speaking on the phone. If your natural voice is too loud or too soft, modulate it to the right level while speaking on the phone.
- Avoid addressing customers by their first names unless they specifically ask you to do so. Keep the address formal and call them along with their title. If you are unsure of pronouncing the name, write down the spelling. Avoid committing information and names to memory as there is a 50% chance of forgetting to act on it.
- Always inform callers before placing them on hold. Avoid keeping callers on hold for too long. Keep in mind that they may have been placed on hold several times before being connected to you. In that case, customers may become irritated at being placed on hold yet again. Most callers tend to simply hang up if left on hold for too long.
- If the boss is unavailable to take their call, take down a message instead. Make sure that you repeat the message to the caller so that you can be confident that you have transcribed the information correctly.
- Some customers may be irate or upset when they call you. Avoid the inclination to snap back or be rude to them. Remember that they are not personally annoyed with you; they are upset because their requirements have not been met. Listen patiently and direct them to the right person.
- Concentrate on responding to the customer and avoid getting distracted by activity or conversations around you. If someone tries to speak to you during the call, signal to them that you will speak to them later.

As a PA, you will often be required to make phone calls on behalf of the business. Making phone calls also involves etiquette and professionalism.

## **Activity 2 - Sharpening Your Business Phone Skills**

*Estimated time: 10-15 minutes*

Hopefully, your practise with telephone etiquette in the previous activity was well received. In the last activity, you called a friend or family member to work on your phone skills.

Now you will work on your ability to make a professional business call. You can task your friends with this or call a business to ask questions. Focus on the tips in this module and do your best to work on your professionalism.

## 5.6 Tips on making business phone calls

1. Identify yourself as well as your company while placing the call and then begin with the content.
2. Remember to be discreet while making phone calls that involve confidential information.
3. Avoid leaving complex, long-winded and lengthy messages. Keep the message concise and to the point. Keep in mind that lengthy messages incur the increased likelihood of being misconstrued and misunderstood at the other end.

Research shows that the actual choice of words only contributes to 20% of the impact of a phone call. Attitude, tone and communication skills comprise the remaining 80%.

### Take a Quick Recap Test

[viralQuiz id=70]

## 5.7 Additional training



**When you are on the job you can ask for on-the-job training and this should be provided by the company.**

In-house or formal training is an excellent way to reinforce telephone communication skills and improve your repertoire of skills as a PA.

If this is not feasible or you wish to practise your phone skills before applying for a job or at home, you can purchase DVD or audio courses. There are several self-improvement programmes that can help you develop your telecommunication skills.



## Go and Practise

*Estimated time: 15 minutes*

Practise a 5 minute phone call with 3 different friends and get them to note down what they experienced from your call. Get them all to be different customers with different queries.

## Assignment

### Telephone skills as a PA

*Time: 30+ minutes*

Hopefully, you took in as much of the information in this 5th module as possible. To find out how well you have done, complete the following worksheet.

Download the worksheet below print out and complete.

[Download Worksheet \(PDF\)](#)

[Download Worksheet \(Word\)](#)

## Module Summary

Phone calls are the lifeline of any business. Most important transactions and relationships begin with a single phone call. The initial phone call has the potential to create a lasting impression of your company. The customer perceives your company and brand based on their phone experience with you. Inbound phone calls are the starting point for more than half of the total sales leads.

Phone etiquette includes the right attitude, choice of words and tone of voice. Responding to phone calls may often require thinking on your feet as you may be required to respond to different situations. High quality phone communication skills are a critical part of a PA's skills.

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