

# make effective phone calls

## 1. Why make that call?

Busy people often don't have time to chat, so be clear about why you're calling and what you require. Do you need information or some action to be taken?

## 2. What information do I need?

It helps if you identify yourself first. Whether you are the customer or are calling a customer, make sure you have all relevant details to hand, eg references, account or order numbers. The better prepared you are, the more likely your call will be successful – whatever its purpose.

## 3. What do I say?

If you're unsure, make notes on what you want to achieve from the call. Write down questions you need to ask and information you require. Refer to your notes when you make the call and use them as a prompt.

## 4. Who do I call?

Speaking to the right person first time prevents you from being passed from one department to another and saves you time. If you already know the organisation or people within it, you will probably have some idea of who to contact. If not, you can often find the telephone number of the appropriate department on printed orders, letters, emails or company web sites.

## 5. Do I need to record details?

Make notes of your phone call, especially if you're placing an order or making a sale. Many transactions are now carried out entirely over the phone and you will need a record of order numbers, costs and other relevant information. Always ask for the name or reference of the person you're speaking to. In some cases, you may want to send a follow-up letter or email to confirm an order or sale.

## 6. What do I do next?

If the purpose of your call is to make the caller take some action, you may not need to do anything else. If you've called to obtain information, action this. If it's needed solely for reference, file it safely in the appropriate place. If it's needed to initiate onward action – eg you've obtained payment for an order about to be despatched – complete this action yourself or ensure the information initiates the next stage of the process. Having taken the trouble to obtain the information, it will be a waste of your time if you do nothing with it.