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Emily Post's

THE ETIQUETTE
ADVANTAGE
in BUSINESS

SECOND EDITION

17 | *On the Telephone*

Thirty years ago, who could have dreamed that placing a call to a business or government department would be as frustrating as it is today? Being put on hold indefinitely or hearing a recorded voice telling us to “press 1 for . . .” slams an electronic door on us and our simple wish to connect with a human being. We press and press again, our blood pressure rising, until we finally reach the desired person—on tape, as often as not, asking us to please leave a message. But here’s the bottom line: Whether or not you’re ultimately successful in completing a call, any frustration must be brushed aside. Smart businesspeople treat even a recording device with courtesy. A message left in an upbeat tone of voice gives the recipient of your call confidence in both you and your company; an irritated tone does quite the opposite.

PLACING BUSINESS CALLS

Before placing your call, prepare by writing down any questions you want to raise, along with the specific topics you want to cover. Even if an item seems minor, jot it down; it’s easy to forget something once the conversation starts rolling. Then place these notes by the phone so you can refer to them throughout the call. If your phone call involves facts and figures, gather together all data sheets or other reference materials you might need. Also, have a blank pad and pen handy, so you can take notes during the conversation, and a desk calendar, in case you need to set dates.

No matter who answers your call—the person you’re trying to reach, a receptionist, an assistant, or your contact’s voice mail—identify yourself at once. Unless you’re calling someone with whom you regularly do business, identify your company, too: “This is Katherine Bowlin of Sellmore Marketing.” Give your full name even if you talk with the person fairly often, since he may not be as familiar with your voice as you think. Using your first and last names each time you call will also reinforce your name recognition.

Next, quickly explain why you’ve called and ask if this is a convenient time to talk. (Failing to ask this question is one of the most common of all telephone errors.) If he says

talking now is fine, state the purpose and estimated length of the call: “Mr. Peterson, I have a question about the marketing proposal. It should take about five minutes.” Try to be honest: If you suspect five minutes is a conservative estimate, say so.

If the person you call says he’s busy, ask when you might call back. Try to avoid having him return the call—this may put you in the awkward spot of not having your thoughts collected or your notes at hand when the call comes out of the blue.

WRONG NUMBERS

If you’ve dialed a wrong number, admit it and apologize. Don’t just hang up. Instead, simply deliver the line that has done service in the cause of good manners for generations: “I’m sorry. I must have dialed the wrong number.” Then give the person the number you were trying to reach, to make sure you don’t make the same mistake twice.

YOU’RE PUT ON HOLD?

If you reach a receptionist who transfers incoming calls or an assistant who takes calls for her boss, chances are, you’ll be asked if you mind being put on hold. If pressed for time, tell the person answering that you’d prefer simply to leave a message—then leave your name, your company name, a brief reason for the call, and either when you can be reached or when you’ll call back.

If you are placed on hold and more than three minutes pass, it’s perfectly proper to hang up and call back later. Even though you’ve been treated badly, try not to betray your annoyance. Politely say that you were unable to hold, and leave it at that: No explanation is required.

USING A SPEAKERPHONE

A cardinal rule for using a speakerphone: Immediately tell the person on the other end of the line that you are using one. If he or she expresses any hesitation, explain why you feel it necessary to be on speaker—because you’d like other people in the room to be included in the conversation, for instance, or because it makes it easier for you to take notes. Most people won’t mind as long as they’re asked beforehand and they understand the reason for using the device.

If others are present, identify them at the very start of the conversation: “There are three people from marketing who’ll be joining in—Leslie Marshall, Andy Armistead, and Kathy Kincannon.” The participants should then introduce themselves so that the person on the other end can begin to link voices to names—sometimes a difficult task, since voices emanating from these devices often sound as if they were coming from a well. Confusion will be kept to a minimum if each participant identifies himself when he speaks to the listener: “Tom, Andy here.” You can also make it clear who’s talking by saying “I agree with what Kathy just said” or “I see Leslie has a question for you.”

ANOTHER IMPORTANT TIP. Close your office door before making any call using a speakerphone. Even though voices are amplified by a speakerphone, people generally tend to talk louder than usual when using one. The result? Workmates within earshot are disturbed by the noise.

PHONE-CALL FAUX PAS

Following are telephone errors made by even the best-behaved businesspeople. Most apply to phone calls in general, not just those from the office.

- Don't do other things at your desk while talking on the phone. Typing or shuffling papers suggests that your attention is elsewhere.
- Eating while on the phone is not only distracting but also subjects the other person to unnerving smacks and crunches. Because sounds are magnified over the telephone, even a cough drop in the mouth can make its presence known.
- Don't leave a radio playing or office equipment running in the background. These sounds, too, are magnified over the phone.
- Never chew gum while talking on the phone. While gum chewing may not be offensive to some people, you have no way of knowing whether your phone mate considers it unprofessional and crass.
- Don't sneeze, blow your nose, or cough directly into the receiver. Either excuse yourself for a moment or turn your head away.
- If you have to put the receiver down during the conversation, set it gently on the desk to avoid startling your phone mate with a sudden bang.
- Don't address a business associate by his or her first name in sentence after sentence: It sounds insincere and patronizing.
- You wouldn't abruptly end a face-to-face encounter just because another colleague walked into your office—so why do so many people feel it's okay to break off a conversation to take a phone call? If you're holding a meeting in your office and the phone rings, don't answer unless you're expecting an important call—in which case you should apologize to those present for the interruption. If possible, make arrangements before the meeting to have all calls channeled to voice mail or to an assistant's or coworker's phone; or if you have a "Do Not Disturb" button on your phone, use it.

- For practical reasons, some executives have assistants stay on the line for the entire call. Even if the conversation is about business and business only, letting your phone mate know that someone else is listening in is without doubt the best thing to do.

ANSWERING BUSINESS CALLS

Never underestimate the importance of how you answer the phone. You never know when it may be the first call from a potential client or customer. Your attitude and demeanor, in turn, will form her initial impression of your company, and you want it to be positive, not poor. Two other considerations:

- An incoming call answered by an actual person instead of a machine will not only make a good impression; it will also earn the caller's eternal gratitude by not putting her in electronic limbo.
- Forget your personal problems. Your voice should sound pleasant and calm whenever you answer the phone, no matter how overworked or rattled you feel. Remember, you're speaking for the company, not yourself.

Whenever possible, answer the phone promptly—that is, by the third ring. Answering with your full name is an absolute necessity whenever a call is coming from outside. Then what to say? Although “Helen Bonner speaking” is not impolite, “This is Helen Bonner” may sound somewhat less abrupt to some ears. Then follow with something on the order of “Can I help you?”

If you work in a company with several departments, state your department after your name: “This is Angela Dixon, Rights and Permissions.” This saves time for both you and the caller, eliminating the need to ask “Is this Mr. Worsham's office?” or “Have I reached the accounting department?”

You're terribly busy? If you don't have an assistant to field incoming calls and a client or customer calls at an inconvenient time, give her precedence over any work you're doing if at all possible. If this is impossible, explain your predicament and tell her you'll phone back whenever it suits her. Agree on a time, and then keep your word. If you do have an assistant, ask her to take messages or route calls to your voice mail when you're busy; or if your phone system allows, press the “Do Not Disturb” button.

IF YOU SHARE AN EXTENSION

When answering a phone shared by others, state the department name before giving your own: "Quality Control, Bill Fryer speaking." If the call is for someone else, say "Just a moment, please" before handing over the receiver. If the person isn't in, tell the caller when he's expected back, if you know, and offer to take a message. Don't volunteer gratuitous information about why someone's not available. If the person is in a meeting or on vacation, say so. Otherwise, don't feel you have to explain his whereabouts. "He's not back from lunch" and similar comments risk raising questions about his work habits.

If you go in search of the person being called, tell the caller how long it will take: "If you can wait two minutes, I'll try to find him." If you haven't located the person within the allotted time, return to the phone with your update. "I'm sorry, but I couldn't find him. If you give me your name and number, I'll leave them on his desk." An alternative is to ask if the caller wants to be routed to the person's voice mail to leave the message himself.

RETURNING CALLS

The number of businesspeople who prefer to hide behind their voice mail is growing by leaps and bounds. Don't be one of them. If someone leaves a message asking you to call back, do so as soon as possible—or at least on the same day the call was received. Twenty-four hours is as long as a call can go unreturned without violating the precepts of good manners. This golden rule is also good business practice—yet it is broken more than almost any other.

If it's an especially busy day and you suspect the call will take more time than you can spare, call the person back, explain the situation, and ask if you can set a time to talk later. Or if you have an assistant, ask him or her to call back and explain the delay, and then arrange a callback time that will be convenient for both parties.

TRANSFERRING CALLS

If whoever you're talking with needs to be transferred to someone else in your company, first give the caller the correct extension in case she is disconnected. Then tell the person to whom the call's being transferred who is on the line and why she is phoning; this spares callers from having to repeat themselves.

THE ART OF THE HOLD

If not handled properly, the words “Hold please” can be two of the cruelest in the English language. Receptionists, assistants, secretaries, and all others who field incoming calls need to be sympathetic to the holder’s dilemma. Doing the following will help keep frustration and annoyance to a minimum:

- Never tell someone to hold; ask them instead. More important still, wait for the answer. The question “Could I please put you on hold?” is doubly irritating when immediately followed by silence or recorded music.
- Give the reason for the hold. “Ms. Tomkins is on another line,” for example. Or “She’s somewhere nearby; I’ll have to page her” or “I’ll have to check to see who can handle that.”
- When someone is holding, deliver a progress update every 60 seconds: “I thought she was almost done with her call, but she’s still on the line.” At the second or third check, ask whether the person would like to keep waiting or would rather leave a message.
- When you finally transfer the call, give the caller your colleague’s name and extension in case he or she becomes disconnected.

SCREENING CALLS

Assistants also bear the burden of screening calls for their bosses and others. This is an area where touchiness abounds. A caller who’s asked his name, put on hold, and then told the desired person is unavailable, for example, may feel he has been deemed unimportant. Similarly, a caller who’s asked “What does this call concern?” might resent having an assistant determine whether his call is worth putting through. (By the way, if you are asked that question, it’s your obligation to answer, even if the matter is a complicated one; the briefest summary—“It has to do with the new banana importing law”—should be satisfactory.)

It is up to those whose calls are being screened to furnish their assistants with the language to be used. It’s then the assistant’s job to use that language with a courteous tone.

POINTS OF POLITENESS

As you mind the more obvious p's and q's of telephone manners, adopting the following three practices will help you make an even better impression:

- *Hold back on first names.* If you haven't met someone and have some reason to suspect she doesn't share your informal nature, don't call her by her first name straight off. Unless she has started the talk with "Call me Rhonda. What can I do for you?" address her as Ms. Jones. An assumption from the outset that the two of you are on a first-name basis can be a mistake; to many people, especially those who are older, it is overly familiar and impolite.
- *Go easy on "you."* During the course of the call, be careful not to overuse the word "you"—especially when your phone mate hasn't met a deadline or taken care of a problem. "You forgot" or "You neglected to" can sound accusatory on the phone, even when said in a pleasant tone. Putting your comments in the form of a question is preferable: "Could you get that to me by Friday?" or "Did you complete the report on that project?"
- *Listen carefully.* The impersonal nature of a phone call makes it easy for you to tune out, even when a business call requires your utmost attention. Listening closely not only is courteous but also ensures you won't miss any details. Also be sure to let the caller know you're listening. Since you can't show this with a nod, a smile, or other visual responses, use verbal responses instead: "Yes, I understand," "Of course," and "I see." (See "The Art of Listening," page 213.)

CALLER ID

Caller ID devices, which attach to your phone and display the number and sometimes the name of the person placing the call, can be both beneficial and bewildering. A positive: They allow you to prepare for a call before answering it. A negative: Answering your phone and using the caller's name at the outset may throw him or her off guard; you may come off as being sneaky—plus, the caller may not be the person identified on the screen.

BUSINESS CALLS IN PROGRESS

Once you do get through to the person you're calling, keep in mind that the impression you make depends entirely on your voice and choice of words, not your appearance; this makes it all the more important to sound professional and personable. Even when rushed,

make an effort to speak slowly and distinctly. One much-advised technique for sounding upbeat is to smile as you speak—the theory being that a smile makes the voice brighter and more pleasant. Even the way you hold the receiver matters: Tucking it under your chin or holding it below your mouth makes you harder to understand.

Follow cues from the person you're speaking with to establish the call's tone. If someone is all-business and no-nonsense, you should be, too. Others may be informal and chatty. In the latter case, indulging someone who strays off the business subject may have the benefit of leading to the discovery of common interests or backgrounds, provided the tangent doesn't distract you from the purpose of your call. People who've never met face-to-face sometimes click and establish a kind of telephonic bond. The goodwill that results makes it all the easier for you to keep the business relationship running smoothly.

CALL WAITING AND OTHER INTERRUPTIONS

Being interrupted by a second call is less common than it once was, now that most office phone systems have voice mail, which automatically records a message from a second caller if you're on the phone. If your office phone still has call waiting without voice mail and it clicks on, apologize to the first caller and say you'll return immediately; put him or her on hold and quickly explain to the other caller that you'll have to call back.

When you switch to the incoming caller, try your best to keep a conversation from starting: Your responsibility is to the first caller, who should never be left on hold for more than thirty seconds; even this brief period can seem like an eternity when a conversation that's going full steam is interrupted. If the incoming call is extremely urgent or from overseas, however, explain to your first caller why you must hang up and set the time you'll call back.

When you have to put someone on hold for other reasons—retrieving data sheets from another office, for example—apologize and tell them how long you'll be off the line. Then return when promised, even if you haven't found what you're looking for. If necessary, explain that you'll need a few more minutes and will call back as soon as your search is successful.

When a coworker arrives at your office door and sees you are on the phone, he should have the courtesy to leave. If he hovers and becomes a distraction, stop the conversation at an opportune moment and say, "Will you excuse me for a moment? There's someone at the door." Then quickly determine why the other person is there, or mouth, "I'll see you later."

MECHANICAL GLITCHES

When a disconnection occurs, it is the caller's responsibility to call back. If you initiated the call, immediately redial the person and apologize, even if you're not at fault: "I'm sorry; we somehow got disconnected. I think we left off with the annual report." Redial even if the

conversation was nearing an end; not calling back is like walking off in the middle of a face-to-face talk.

If you're the one who was called, stay off the line. If the person who made the call doesn't ring back within five or six minutes, you may then call him or her, saying, "I'm not sure we were through talking when the line went dead."

If a bad connection or static on the line makes it difficult to hear, don't be embarrassed to ask the other person to hang up so that you can try again. A second call often solves the problem, even when placed right away.

USING VIDEOPHONES AND TEXT TELEPHONES

Workplaces staffed largely with young, technology-minded employees are more likely to be equipped with videophones, which use a built-in camera to project your image to the caller. These devices can also be used as regular phones by simply switching off the camera. No special rules apply: A call on a videophone involves no more preparation than getting ready to answer the front door—you just have to look presentable enough for a face-to-face encounter.

Also coming into wider use for people who are deaf or hard-of-hearing are text telephones, also called teletypes (TTYs) or telecommunication devices for the deaf (TDDs). These devices, which look like small typewriters, permit two people to communicate by typing back and forth in a conversational manner over a phone line.

If your office isn't equipped with a TDD, you can still communicate with the deaf or hard-of-hearing by using a relay service. In this case, the hearing caller speaks to a mediator, who relays words to the recipient by teletyping them into a console; the words then appear in the display window of the recipient's device.

If conversing with a deaf or hard-of-hearing person over a TDD, keep the following two things in mind:

- Address him directly, as if the mediator weren't present. Do not say, "Tell him that . . ." or "Ask him to . . ."
- As with any other call, adhere to the precepts of telephone etiquette.

CLOSING A CALL

When you end a business call, don't leave matters hanging. Wind things down with a conclusive statement: "I'll get the final figures to you by noon Friday" or "I think we agree we need more research. Shall we talk again, maybe tomorrow?" Then sign off on a positive note with a polite acknowledgment: "Thank you for calling" or "It's been nice talking with you."

A few minutes spent discussing things that have nothing to do with the business at hand are perfectly in order after callers have established a friendly relationship. But don't overdo it: Without any visual clues from your phone mate, it's hard to tell when you're wearing out your welcome.

THE CELL PHONE

Cell phones are great when used properly; they allow the user to be more immediately reachable. Their very utility, however, is also their downfall. Inappropriate use of cell phones does more to damage business relationships than almost anything else. When a businessperson becomes a slave to the phone rather than the master of it, she has crossed the line and will end up using it inappropriately.

Here are five critical tips every cell phone user should know and use:

- 1 Don't let your phone ring if the ringing will disturb others around you. Meetings, presentations, plays, and movies—these are all times when turning the cell phone off (or at least setting it to vibrate) is mandatory.
- 2 Don't take your phone out and start using it if there is any possibility the people around you will be bothered by your use of it. Also, don't assume they won't listen to your conversation. Remember: It's much harder to ignore a conversation when you hear only one side of it than when you hear both people talking.
- 3 Absolutely never say anything confidential, personal, or private if others can overhear you. Instead, stop the conversation by telling the other person you'll call back when you can talk privately.
- 4 Speak quietly. Most people's phone voices are consistently louder than their regular voices. When speaking on a cell phone, you need to be especially careful not to shout—otherwise you'll end up sharing your conversation with everyone in the waiting room.
- 5 Don't overdo it. One brief conversation isn't likely to disturb anyone, but an hour and a half of continuous use may drive those around you crazy.

ON THE STREET

Cell phones come into their own on the sidewalk or in a cab, when there is often good reason to use one: You've left the office and are delayed for an appointment, or you've forgotten to relay an urgent piece of information to someone, or you suddenly remember you

need another set of figures for a meeting. Just remember not to shout into your phone while walking down the street: It's you, not your phone mate, who is contending with traffic noise. What's more, talking loudly may leave the impression to passersby that you're eager to call attention to yourself. Another consideration: Remember safety and pay attention to your surroundings, especially when crossing intersections or maneuvering on crowded sidewalks.

IN RESTAURANTS

While cell phones have a place in business, using them in a restaurant is another matter entirely. That old rule of "a time and a place for everything" applies here especially: After all, restaurants are places where people come to relax and dine, as a respite from the workday grind. Some restaurants, in fact, require cell phones to be checked at the door or to be used only outside the dining areas. The rule is simple: Excuse yourself from the table and make or take the call in an anteroom, a restroom, or a lobby or step outside. There are exceptions to this rule, of course—for example, a doctor who is on call. At business and social meals alike, making or receiving a phone call at the table is both inconsiderate and intrusive.

So what if the person at the next table is gabbing away on a phone while you're trying to talk business? If his voice is rising above the ambient noise, a dirty look will probably be little more than water off a duck's back. Instead, ask the waiter or manager to talk with the offender. Never approach a stranger and try to correct his behavior. You have no idea how he will react, and the result could be an unpleasant—and unhelpful—confrontation.

IN THE CAR

Phoning from moving vehicles brings up the question not only of etiquette but also of safety. Carrying on a phone conversation diverts the driver's attention from the road, and driving with only one hand heightens the danger even more. Many states are jumping on the bandwagon and making it illegal to use handheld cell phones in an automobile—so be aware of the laws in your area. The use of a portable speakerphone, a built-in phone, or a hands-free device (a headband with a mouthpiece that plugs into a cell phone) will lessen the risk, but the smartest choice is to pull over to the side of the road before making a call.

ANOTHER NECESSARY COURTESY. Let your phone mate know if there are other people in the car who will be privy to the conversation.

PAGERS

The annoyance potential for pagers, or beepers, is as high as that for cell phones. Those who use them should remember that however urgent the page, the pager should be turned off at once, especially at a public gathering.

Happily, the days of the audible pager are numbered. Just as the boom box has been largely replaced by portable CD, tape, and MP3 players and earphones, noisemaking pagers are being supplanted by ones that signal a page with a light, a low-volume tone, or a silent vibration; newer models also feature voice mail and numeric and alphanumeric messages.

ANSWERING MACHINES AND VOICE MAIL

Whether you use an answering machine in a home office or are connected to a voice mail service at your company, there are certain practicalities and civilities you need to keep in mind:

MESSAGE CHECKLIST

When you take a telephone message, both the caller and the person you're taking the message for will appreciate it if you do the following:

- *Get the name and number right.* Ask the caller's complete name. Also ask for the spelling, since many names can be spelled more than one way—for example, Jean or Jeanne, Allen or Alan, Deborah or Debra, Anderson or Andersen. Then read the phone number back to the caller.
- *Ask the name of the caller's company.* This may help the person for whom you're taking the message identify the caller more easily. It also provides an idea of what the call may be about.
- *Note the date and hour.* Jot down the time the call came in, so the person knows how long the message has been sitting there.
- *Add your initials or name.* Do this in case the person receiving the message wants to know more about the call.
- *Deliver your message.* All your good effort to write the information down will be wasted if you don't make sure the message gets to the intended recipient.

RECORDING A GREETING

On your office phone, a no-nonsense, straightforward greeting is the better choice by far. Short and sweet is the goal—your full name, your company name, and a request that the caller leave a message: “This is Miguel Hernandez at Johnson-Cowles. Please leave your name and number and I’ll call you back.”

You may also want to change your greeting daily to give callers an idea of your schedule: “On Tuesday, July 12, I’ll be in a meeting in the early afternoon, but I should be in my office for the rest of the day. If you leave a message, I’ll call you back as soon as possible.” You might also refer callers to an assistant or someone else in your department: “If you need to speak with someone immediately, you can call Cassandra Reagor at extension 7131.”

When you’re going away on a business trip or vacation, change your greeting before you depart. After identifying yourself, say “I’ll be out of the office until Monday, August 17. Please call back then.” (For safety and security, if you work at home, do not leave this message. Instead, simply ask callers to leave their name and number.) You should also give the name and number of someone else in your department to contact if an issue needs to be discussed before you return.

LEAVING A MESSAGE

A cardinal rule when leaving a message is to state your name and number slowly and clearly at the start of the message. Many people ramble on until they realize they’re about to be cut off, then recite their number so quickly that it’s often indecipherable. Also, keep your message short: Since most people have little tolerance for long messages, you risk getting passed over or deleted if you don’t get straight to the point. Worse still, long messages can overwhelm a voice mail system. Finally, repeat your name and number at the end of the message.

RETURNING CALLS

Return all calls left on your answering machine or voice mail within twenty-four hours. If you are the one leaving a message, reduce the potential for telephone tag by stating where you can be reached and when—then make it a point to be available at that time. If something comes up and you can’t keep your promise, leave a second message explaining the circumstances and saying when you plan to call again. Then do it: Not calling back when you said you would is the equivalent of standing someone up.