Phone Answering & Etiquette Policy

Answering the phone professionally and friendly is critical factor in whether our guests, potential guests, and other owners decide to receive services from our practice. For that reason, the following requirements must be met when answering company phones:

1. Phone calls must be answered within 3 rings.
2. Use a friendly, warm tone of voice, and smile. You can hear a smile through the phone.
3. Greet all callers by saying “Click or tap here to enter text.: This is (state your name), how may I help you?”
4. To end a call, thank them for calling and let them know they can call anytime they need assistance. End with “Have a nice day.”
5. When placing a call on hold for another employee, check back to ensure the phone call has been picked up or update the caller that it will be a few more minutes.
6. Communication on the phone should be clear and concise. Avoid using “uh-huh”, “yeah”, “yep”, or “one sec”.
7. While on the call, if you do not know an answer to a question, do not say “I don’t know”. Instead, let the caller know you will get the answer to their question, or tell them you will get someone who can assist them with their questions.

**For call transfers**

1. If you personally cannot assist a caller or if the call is for another employee, inform the caller that you will place them on a brief hold by saying “Yes Sir/Ma’am. Please hold for a moment while I check if Diane is available.”
   1. If the person they are trying to reach is available, inform the caller you will be transferring them to that person before you transfer them.
   2. If the person they are asking for is not available, inform the caller that “they are not available at the moment. Is there something I can assist you with?” If not, ask “Can I take a message?”
2. If a caller wishes to leave a message, you must fully enter the message on the message pad including all of the following information:
3. the date and time of the call
4. the caller’s first name, last name, and call back number
5. what the call is regarding
6. the signed of the employee who took the call.
7. All messages must be relayed in a timely manner.
8. If a message is left for an employee who is out of office for the day, the message must be given to the supervisor who will return the call.
9. Transfer all calls in an efficient manner, and instruct the caller to call back if they are accidentally cut off.

Click or tap here to enter text.

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