Demonstrate Proper Business Etiquette: Phone, Email, and Message Taking

PROPER BUSINESS ETIQUETTE for phone, email, and message taking follows strict rules of workplace protocol and is designed to enhance communication and comfort between users. Without the use of etiquette, callers may perceive people to be rude, which may result in a loss of business. Proper etiquette makes callers feel important and tends to retain customers or clients.

Objectives:

1. Demonstrate proper business etiquette on the phone.
2. Demonstrate proper business etiquette with email.
3. Demonstrate proper business etiquette with message taking.

Key Terms:

active listening
conference calls
etiquette
videoconferencing

Phone Etiquette

Etiquette is a prescribed social code or protocol. Business etiquette is the prescribed social/work code or protocol used by employees in the workplace. Many aspects of etiquette involve ensuring clear communication and comfort. Good phone skills are a subcategory of communication. The proper business etiquette for phone usage is comprised of techniques for careful listening and speaking as well as some specialized skills in the area of phone technology.

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LISTENING

Active listening lets the speaker know he or she is being heard and understood. It is more than hearing; it is about being focused on the speaker, the message, and any other cues being sent by the sender. **Active listening** receives all the messages sent by the sender, processes them, and repeats the message back to the sender for confirmation of the message.

It is important to focus on the speaker by minimizing other activities and distractions. A listener should be patient and helpful to the caller. This enables the caller to know that he or she is the only priority and that the receiver of the call will assist with whatever is needed or will find the proper referral if the answer is not readily available.

SPEAKING

The other side of communication is speaking. When speaking, you should personalize the call by introducing yourself and by using the name of the caller in any response. In most business settings, there is an expected and endorsed expression that should be used when answering the phone (e.g., "Thompson Electric, Joe speaking. How may I help you?").

After the caller has spoken, repeat key pieces of information to verify the message contents. Smile while speaking because the smiling action translates to receptiveness and helpfulness in your speech back to the caller. Finally, always thank the person for calling at the end of the conversation. This leaves a positive last impression.

PHONE TECHNOLOGY

Many features of phone technology can complicate or assist with communication. Therefore, the user of the technology must determine if the advantages outweigh the disadvantages.

Caller ID

Caller ID displays the identity of the caller. This is to your advantage in terms of recalling a business history or the preferences of the caller. However, you should not answer the phone with the presumption of who is calling.

Speakerphones

Speakerphones are helpful because they allow speakers and listeners to engage in communication without holding the actual phone. The downside,

FIGURE 1. Caller ID can store a certain number of phone numbers from received calls.

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FURTHER EXPLORATION...

ONLINE CONNECTION: Business Etiquette Practice

Review the following practice transcripts for telephone, email, and message taking. Consider the strengths and weaknesses of each transcript. How could they be improved? Use your creativity to rewrite them after visiting the following links and reading the relevant information:

http://www.salary.com/personal/layoutscripts/psnl_articles.asp?tab=psn&cat=cat011&ser=ser033&part=par224

http://ezinearticles.com/?20—Business-Telephone-Etiquette-Tips&id=246471

Telephone Transcript

Receiver: Hello. This is Dr. Martin's office. Donna speaking.

Caller: Hello. I'd like to make an appointment to have my teeth cleaned.

Receiver: I'm happy to help you with that. With whom am I speaking?

Caller: This is Sue Johnson.

Receiver: Good Morning, Ms. Johnson. What days and times are good for you? Would a Tuesday afternoon work?

Caller: Well, actually Tuesdays are not good, but Wednesday mornings are great.

Receiver: Wednesdays work for us, too. How about March 31 at 10 a.m.?

Caller: Great.

Receiver: Wonderful. Then we'll see you on Wednesday, March 31 at 10 a.m.

Caller: Okay. Thank you.

Receiver: Thank you for calling.

Email

John,

This report needs to be improved before we send it to Mary. DO THE FIGURES OVER on pages 3 through 12 and the pictures on 6 and 12. Pages 23 and 16 are really something. What can I say? You outdid yourself on this one.

Jack

Phone Message

For: Robert

From: Jason

Re: Meeting

Date: Tuesday, May 15

Message: Wants to change time of tomorrow's meeting: 9 to 10. Has a conflict.

Taken By: Mark

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however, is that they pick up a great deal of background noise. In addition, speakerphones allow both communicators to be distracted with other hand and brain tasks, thereby harming the communication process.

Call Waiting

Call waiting is generally not prevalent in the work environment because most businesses use additional phone lines. But if the business is small and call waiting is the method used by the company to handle additional calls, ask your supervisor directly how to handle the situation.

Hold

Hold is the action of putting a caller in a waiting cue while you look for a person or a piece of information. Putting a caller on hold should be avoided at all costs. Rather than putting the person on hold, suggest taking a message and returning the call in a few minutes with the needed information. At a minimum, give the caller the option of waiting or being called back.

Conference Calls

Conference calls are phone functions that allow more than two speakers in separate locations to speak at once in one conversation. Most conference calls are three-way conversations, but the number of callers can vary. The general rule of thumb for conference calls is to agree to the conferencing procedures. One person is the main coordinator of the call. Other callers then must introduce themselves as they join and leave the call.

Videoconferencing

Videoconferencing is similar to conference calls with the added feature of having a visual representation. With this in mind, participants must pay attention to their posture, facial expressions, and any other visual cues they may be sending to other callers.

Cell Phones

Cell phones are becoming increasingly popular and require some additional techniques for callers and listeners. Cell phones allow callers to be contacted while they are involved in almost any

FIGURE 2. Cell phones are rapidly becoming a popular tool used by businesses.

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activity, and not all cell phone users consider their ability to converse before they answer the phone. As the caller, if the communication is not what it needs to be, suggest calling back later. Also, as a caller, be aware that your cell phone transmission may not be the best or background noises may be added to your call.

Email Etiquette

Email allows people to communicate instantly. Sometimes instant communication can be rushed, emotional, unclear, passive-aggressive, lazy, and a poor substitute for a real, face-to-face and necessary conversation. By knowing the proper etiquette, the common pitfalls can be avoided.

SHARED CONTENTS

As you write an email, assume your message will be shared with everyone in the workplace or will be published in a newspaper. If you would not want the contents of your message shared, do not write or send the email. Also, remember that all the same grammar, spelling, and punctuation rules apply to emails. Email formats are more casual than business reports, but they still must reflect your best skills.

REREAD AND VERIFY

Do not be hasty. Before you hit send, reread your message and ask yourself if it is clear, necessary, and helpful to the situation being discussed. Verify the address to which the message is being sent, and ask yourself if everyone in the "to:" portion of the email needs the information.

BE PROFESSIONAL

Resist using email to punish, embarrass, joke, or expose a behavior. Email is not the place for any of these actions and can be easily misconstrued. This may end up hurting the sender in the long run. Keep correspondence professional.
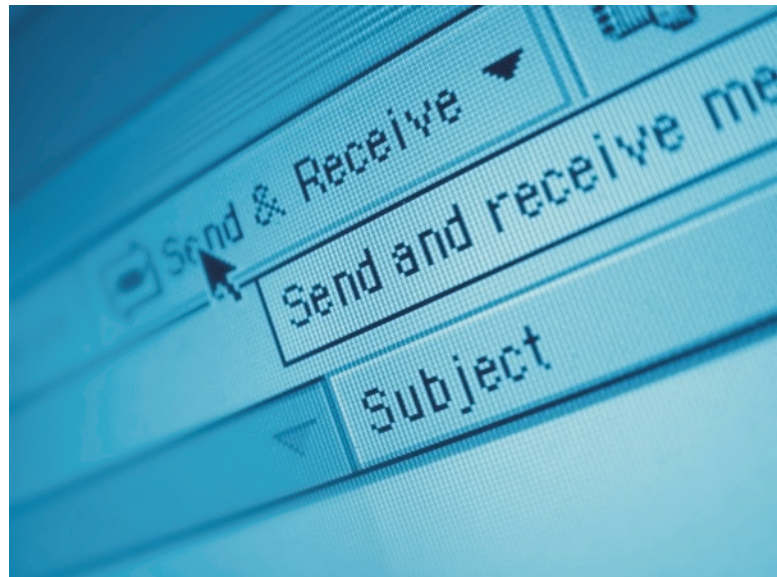
FIGURE 3. It is highly recommended that an email be read and reread before it is sent.

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Etiquette for Message Taking

The proper business etiquette with message taking is crucial in the workplace. There is a set format or structure to any good and accurate phone message. Most businesses use a set format or form for message taking, and others use a computerized version of the same. Regardless of the actual form, most messages contain the same types of information.

When a call comes in for an individual who is not available, you must introduce yourself and your position, let the caller know the person is unavailable, and then say, "How can I help you?" Many times the caller will choose to leave a message or will need to speak with the specific person who is unavailable. Use your active listening skills. If it is the caller's desire to leave a message, make sure to obtain the following items:

♦ The date and time
♦ The person for whom he or she is calling
♦ The person who called and the company from which he or she called
♦ The reference of the call
♦ The actual message
♦ The name of the person who took the message (your name)
♦ Any other related details
♦ (The message should be repeated back to the caller and checked for accuracy.)

Summary:

Etiquette is a prescribed social code or protocol. Business etiquette is the prescribed social/work code or protocol used by employees in the workplace. Many aspects of etiquette involve ensuring clear communication and comfort. Good phone skills, emails, and message taking are subcategories of communication.

The proper business etiquette for phone usage is comprised of techniques for careful listening and speaking as well as some specialized skills in the area of phone technology. Email allows us to communicate instantly, which can be problematic. However, the common pitfalls can be avoided by knowing the proper etiquette.

There is a set format or structure to any good and accurate phone message. Most businesses use a set format for message taking; others use a computerized version of the same. Regardless of the actual form, most messages contain the same features. By knowing the prescribed etiquette for use of the telephone, emails, and message taking, you will send and facilitate the transfer of clear messages and will be an asset to your employer.

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Checking Your Knowledge:

1. Briefly describe the proper business etiquette for message taking, and give an example of a proper message.

2. Briefly describe proper phone business etiquette.

3. Define "active listening."

4. Define "business etiquette."

5. Describe proper email business etiquette.

Expanding Your Knowledge:

Prepare three separate note cards that summarize the key business etiquette points from the topical areas of telephone use, email, and message taking. Show these to your business education teacher, and ask if the cards may be helpful to other students.

Web Links:

Telephone Manners
http://www.salary.com/personal/layoutscripts/psnl_articles.asp?tab=psn&cat=cat011&ser=ser033&part=par224

Twenty Business Telephone Etiquette Tips
http://ezinearticles.com/?20—Business-Telephone-Etiquette-Tips&id=246471

Business Email Etiquette
http://www.businessemailetiquette.com/

Taking Good Phone Messages
http://www.ehow.com/video_4401591_taking-good-phone-messages.html

Ten Tips for Email Etiquette
http://website101.com/email_e-mail/email-etiquette.htm

Taking and Leaving Messages
http://openlearn.open.ac.uk/mod/resource/view.php?id=171333

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