

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

Unit: Communication Skills

Problem Area: Demonstrate Business Communication Etiquette

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

■ **Student Learning Objectives.** Instruction in this lesson should result in students achieving the following objectives:

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

■ **Resources.** The following resources may be useful in teaching this lesson:

Belding, Shaun. *Winning with the Caller from Hell*. ECW Press, 2006.

Fox, Sue. *Business Etiquette for Dummies*, 2nd ed. Wiley, 2008.

Friedman, Nancy J. *Telephone Skills from A to Z*. Thomson, 2000.

Roane, Susan. *The Secrets of Savvy Networking*. Grand Central, 1993.

“Taking and Leaving Messages,” The Open University: Learning Space.

Accessed May 30, 2009. <<http://openlearn.open.ac.uk/mod/resource/view.php?id=171333>>.

Walker, Lin. *Telephone Techniques*. Amacom, 1999.



■ **Equipment, Tools, Supplies, and Facilities.**

- ✓ Overhead or PowerPoint projector
- ✓ Visual(s) from accompanying master(s)
- ✓ Copies of sample test and/or other items designed for duplication
- ✓ Materials listed on duplicated items
- ✓ Computers with printers and Internet access
- ✓ Classroom resource and reference materials

■ **Key Terms.** The following terms are presented in this lesson (shown in bold italics):

- ▶ active listening
- ▶ conference call
- ▶ etiquette
- ▶ videoconferencing

■ **Interest Approach.** Use an interest approach that will prepare the students for the lesson. Teachers often develop approaches for their unique class and student situation. A possible approach is included here.

Show the students the following telephone transcript, email, and phone message. Have the students work with a partner to discuss the strengths and weaknesses of each item. Then discuss their findings as a class. (VM–A can be used as a pre-lesson handout for students.)

SUMMARY OF CONTENT AND TEACHING STRATEGIES

Objective 1: Demonstrate proper business etiquette on the phone.

Anticipated Problem: What is proper business etiquette for phone use?

- I. Business etiquette on the phone—***Etiquette*** is a prescribed social code or protocol. Business etiquette is the prescribed social/work code and 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.

A. Listening

1. Active listening is important because it lets the speaker know he or she is being heard and understood.
 - a. Active listening is more than hearing; it is focused on the speaker, the message, and any other cues being sent by the sender.
 - b. **Active listening** receives all the messages sent by the sender, processes them, and then repeats the message back to the sender for confirmation of the message.
2. Minimizing other activities and distractions allows the listener to focus on the speaker.
3. The listener should be patient and helpful to the caller. The caller should feel as if he or she is the only priority and should believe the listener will assist with whatever is needed or find the proper referral if the answer is not readily available.

B. Speaking

1. The call should be personalized.
 - a. The receiver should introduce himself or herself.
 - b. The receiver should use the name of the caller in any response.
 - c. In most business settings, there will be an expected and endorsed expression that should be used when answering the phone (e.g., “Thompson Electric, Joe speaking. How may I help you?”).
2. Key pieces of information should be repeated back to the caller to verify the message contents.
3. The speaker should smile while speaking as the smiling action translates to receptiveness and helpfulness in the speech back to the caller.
4. The caller should always be thanked for calling at the end of the call. This leaves a positive last impression.

C. Phone technology

1. Caller ID—The identity of the caller can be used to the recipient’s advantage in terms of recalling business history or preferences. However, the phone should not be answered with the presumption of who is calling.
2. Speakerphones are helpful in that they allow the speakers and the listeners to speak and listen without holding the actual phone.
 - a. Speakerphones pick up a great deal of background noise.
 - b. They allow both communicators to be distracted with other hand and brain tasks, thereby harming the communication process.
3. Call waiting is generally not prevalent in the work environment as most businesses use additional phone lines. If the business is small and call waiting is the method used to handle additional calls, a supervisor should be asked directly how the situation is to be managed.

4. Hold is the action of putting a caller in a waiting cue while the receiver looks for a person or a piece of information. Putting a caller on hold should be avoided at all costs.
 - a. Rather than putting the person on hold, the receiver can make the suggestion to take a message and call the person back in a few minutes with the needed information.
 - b. At a minimum, the receiver can give the caller the option of waiting or being called back.
5. **Conference calls** are phone functions that allow more than two speakers in separate locations to speak at once in one conversation.
 - a. Most conference calls are three-way conversations, but the number can vary.
 - b. The general rule of thumb for conference calls is to agree as to the conferencing procedures. One person is the main coordinator of the call. Other callers must introduce themselves as they join and leave the call.
6. **Videoconferencing** is similar to conference calls with the added feature of having visual representation. With this in mind, it is crucial for participants to pay attention to their posture, facial expressions, and any other visual cues they may be sending to other callers.
7. Cell phones are becoming increasingly popular and require some additional techniques for callers and listeners.
 - a. Cell phones allow callers to be called while they are involved in almost any activity. Not all cell phone users consider their ability to converse before answering the phone.
 - b. If the communication is not what it needs to be, it is important for the caller to suggest calling back later.
 - c. As a caller, it is important to understand that a cell phone transmission may not be the best. In addition, distractions and background noises may be added to the call.

Divide students into small groups. Provide each group with a scenario to role play. Discuss what features of proper business phone etiquette were demonstrated or were needed.

Objective 2: Demonstrate proper business etiquette with email.

Anticipated Problem: What is proper business etiquette with email?

- II. Business etiquette with email—Email allows people to communicate instantly, which can be problematic. Sometimes instant communication can be rushed, emotional, unclear, passive-aggressive, lazy, and a poor substitute for a real and necessary conversation. By knowing the proper etiquette, the common pitfalls can be avoided.
- A. The writer should assume the message will be shared with everyone in the workplace or even put in a newspaper. If the writer would not want the message contents to be shared, the contents do not belong in an email.
 - B. The writer should remember that grammar, spelling, and punctuation rules apply.
 - C. The writer should not be hasty. Before hitting send, he or she should reread the message and ask if it is clear, necessary, and helpful to the situation.
 - D. It is necessary for the writer to verify the address(es) to which the message is being sent. (He or she should consider if everyone in the “to:” portion needs the information.)
 - E. The sender should resist using email to punish, embarrass, joke, or expose a behavior. Email is not the place for any of these and can be easily misconstrued, which may hurt the sender in the long run.

Ask the students to share some of their personal experiences or experiences of those they know in regards to email use and its consequences.

Objective 3: Demonstrate proper business etiquette with message taking.

Anticipated Problem: What is proper business etiquette with message taking?

- III. Business etiquette with message taking—Proper business etiquette message taking is crucial in the workplace. There is a set format or structure to any good and accurate phone message. When a call comes in for an individual who is not available, the person answering the phone should introduce himself or herself and his or her 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, so using active listening skills is essential. The following information should be included in the message:
- A. Date and time of the call
 - B. The person for whom the caller is calling
 - C. The person who called and the name of his or her company
 - D. The reference of the call
 - E. The actual message
 - F. The name of the person who took the message

- G. Any other related details
- H. (Also, the message should be repeated back to the caller and checked for accuracy.)

Display VM–B. Ask the students to indicate some of the strengths and weaknesses of the messages.

- **Review/Summary.** Use the student learning objectives to summarize the lesson. Have students explain the content associated with each objective. Student responses can be used in determining which objectives need to be reviewed or taught from a different angle. Questions at the end of chapters in the textbook may also be used in the review/summary.
- **Application.** Use the included visual masters to apply the information presented in the lesson.
- **Evaluation.** Evaluation should focus on student achievement of the objectives for the lesson. Various techniques can be used, such as student performance on the application activities. A sample written test is provided.

■ **Answers to Sample Test:**

Part One: Matching

1. c
2. b
3. d
4. a

Part Two: Short Answer

1. Answers may vary some but should include the following: 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. Use your active listening skills and obtain the following items:
 - ◆ Date and time
 - ◆ The person for whom the caller is calling
 - ◆ The person who called and his or her company
 - ◆ The reference of the call
 - ◆ The actual message
 - ◆ The name of the person who took the message
 - ◆ Any other related details
 - ◆ (The message should be repeated back to the caller and checked for accuracy.)

Example:

June 2, 2009 (9:15 a.m.)

For: Sue Johnson

Who: Mary White of CCC, Inc.

Re: Tuesday's report to the board

Message: The report was copied and bound yesterday and is ready early for pick up and distribution.

Taker: Max

2. Answers will vary but should items in the following categories:
 - ◆ Listening (e.g., active listening, focus, and patience)
 - ◆ Speaking (e.g., personalize, repeat back, smile, and thank caller)
 - ◆ Technology (e.g., Caller ID, speakerphone, call waiting, hold, conference calls, videoconferencing, and cell phones)

Part Three: True/False

1. F
2. F
3. F
4. F
5. F

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► Part One: Matching

Instructions: Match the term with the correct definition.

- a. active listening
- b. conference calls
- c. etiquette
- d. videoconferencing

- _____ 1. A prescribed social code or protocol
- _____ 2. Phone functions that allow more than two speakers in separate locations to speak at once in one conversation
- _____ 3. Similar to conference calls with the added feature of having a visual representation of the callers
- _____ 4. The process of receiving all the messages sent by the sender, processing them, and repeating the message back to the sender for confirmation of the message

► Part Two: Short Answer

Instructions: Answer the following.

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



2. Briefly describe proper business etiquette on the phone.

► **Part Three: True/False**

Instructions: Write *T* for true or *F* for false.

- ____ 1. All phone messages should be brief and to the point.
- ____ 2. Caller ID is valuable because you know who is calling, so you can answer the phone using the person's name.
- ____ 3. Active listening means asking lots of questions.
- ____ 4. Email replies need to be sent out as soon as the message is received.
- ____ 5. Email should always be used first as it saves time.

PRE-LESSON HANDOUT

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

PHONE MESSAGES

What are the strengths and weaknesses of the following messages?

◆ Example One:

- To: Colleen
- From: Bill
- Date: Monday, July 14
- Message: The part you wanted is on backorder.
- Taken By: MJ

◆ Example Two:

- To: Jeff Bee
- From: Aidan
- Date: Wednesday
- Message: The meeting has been rescheduled.



◆ **Example Three:**

■ To: Lisa Leech

From: Ben Edwards (314) 895-0900, ext. 432

Date: Thursday, Aug. 15 (10 a.m.)

Message: Your shipment of planners has arrived and can be picked up at the dock any time between 8 a.m. and 5 p.m. (Monday through Friday). You will need your confirmation number and a photo ID.

Taken By: Thad Davis, ext. 11

◆ **Example Four:**

■ To: Mechanics Department

From: Honda Factory

Date: Sept. 24

Message: Call them about your order.

◆ **Example Five:**

■ To: John

From: John

Date: Oct. 12 (12:30 p.m.)

Message: If you add another ream of paper to the order, you are entitled to a discount. Call your representative.

Taken By: John