



Unit: Understanding Leadership

Skill 20: Defining Leadership

Activity A: Phone Etiquette

Activity Skills:

Listening, verbal communication.

Leadership Skills:

Etiquette for professional phone calls.

Suggested Level:

Beginning

Time:

25-35 minutes

Supplies needed:

- Copies of the “Phone Etiquette” handout

Do Ahead:

- Make copies of the worksheet

Source:

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BACKGROUND:

Effective communication is important - as much so over the phone as in person! While it seems simple enough to take a message, leave a message or return a call, there are some guidelines that one should keep when placing or receiving a professional phone call.

First, try to put the person you’re talking to at ease by speaking in a pleasant tone of voice and greeting them courteously. Second, practice active listening. Demonstrate that you are interested by responding appropriately. Third, smile! Even though the other person can’t see you, a smile brightens the tone of your voice and makes you more inviting. Finally, always remember to end your phone call with some sort of pleasantry such as “Thanks for calling…” or “It was a pleasure speaking with you…”

In addition to the general tips mentioned above, this activity introduces participants to basic telephone etiquette for, placing a professional telephone call, answering a professional call, leaving a message, taking a message for someone else and returning phone calls.

WHAT TO DO:

Introduce the activity as outlined above and distribute the handout, “Phone Etiquette.”

Have participants get into pairs and work through each section on their activity sheet. Instruct the pairs to read through the guidelines for each section, and role play the scenarios. Between scenarios, the participants should switch roles so each person receives a turn to practice:

- Placing a call
- Answering a call
- Leaving a message
- Taking a message

TALK IT OVER:

Reflect:

- Can you think of any other considerations for professional phone calls?
- If someone leaves a message for you, how soon do you think you should return the phone call? (*Typically, one should return the call within 24 hours unless asked to call back at a later date.*)
- If leaving a voicemail for someone instead of leaving a message with a receptionist or coworker, can you think of any additional

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tips or guidelines for leaving your message? (*Responses might include, keep messages to 90 seconds or less, sound pleasant, be personable etc.*)

Apply:

- Can you think of any settings not used in this exercise where the tips and guidelines you learned might apply?
- Why is phone etiquette important?

BEYOND THE BOX:

Optional Homework:

Have your student do some more research on one of the following topics:

- How to handle an impatient or difficult caller.
- Creating a proper voicemail greeting.
- The proper response when the person requested is unavailable (e.g. gone for the day, not available yet, out of the office for the moment etc.).

Resources and Web Links:

AZUSA Pacific University, Information and Media Technology
<http://www.apu.edu/imt/telecom/etiquette.php>

California State University, Fullerton, Information Technology Department. <http://www.fullerton.edu/it/services/Telecomm/FAQ/etiquetteguide.asp>

Regina M. Robo, Salary.com http://www.salary.com/advice/layouthtmls/advl_display_ocat_Ser83_Par176.html

[Amy Vanderbilt's Complete Book of *Etiquette*](#) by Letitia Baldrige

[Miss Manners Guide for the Turn of the *Millennium*](#) by Judith Martin

[Emily Post's Etiquette](#) by Peggy Post

[The Etiquette Advantage in Business](#) by Peggy Post and Peter Post