



## Phone Etiquette

### Section 1: Placing or Receiving a Professional Telephone Call

If you are answering a professional call,  
 be prepared to:

- greet the caller
- say the name of the organization, club, or company you represent
- state your name

Example: “Good afternoon, Chuck’s Cheese Factory. This is Jane speaking.”

If you are the person placing the call,  
 be prepared to say:

- your name
- the organization, club, or company you represent
- the purpose of your call

Example: “Hi, my name is Fred Roberts from Mickey’s Mousetraps, I’m calling to confirm your order for ten thousand mousetraps.”

### Exercise:

Use the guidelines above to role play the following scenario with your partner. Choose one person to play each of the characters, making sure to follow the instructions for your character. Remember to switch roles so each of you places and answers a call.

**Scenario 1:** *Bob Nedley of Bob’s Breadstore calls Susie Gerritt at Fred’s Flour Factory to order 250 lbs. of flour. Your individual directions are below:*

Bob Nedley (places call)

You will call Fred’s Flour Factory, and explain that you would like to place an order for some flour... 500 lbs. of flour to be exact! You will ask the price of the order as well as when the shipment will arrive.

Susie Gerritt (answers call)

You will answer the phone and take Mr. Nedley’s order. You will tell him that 500 lbs. of flour will cost \$175 and it will be delivered by next Friday.



Unit: Understanding Leadership  
**Skill 20: Defining Leadership**  
**Activity A: Phone Etiquette**  
Worksheet

**Scenario 2:** *Kristen Johnson from Power Graphics calls James Thomas, Director of Children's Hope, to provide an update on a brochure that Power Graphics is designing.*

Kristen Johnson (places call)

You will ask for James Thomas, and let him know that the brochures for Children's Hope have been designed and are ready for review. When he asks how to review them, inform him that you can send them as an e-mail attachment. Confirm his e-mail address before ending the call.

James Thomas (answers call)

You will answer the call and find out the brochures you ordered from Power Graphics have been designed. Ask how you can review the brochures for errors before they get printed.

## Section 2: Taking and Leaving Messages

**If you are leaving a message keep in mind the following:**

- Keep it short
- State your name, your organization, club or company and the purpose of your call
- Leave your contact information and a convenient time to be called back

**If you are taking a message:**

- Write down who the call is for and what the call is regarding
- Record the caller's name, organization and contact information
- Take down the date and time of the call.
- Repeat the message to the person leaving it, to confirm that you have recorded everything accurately.
- Write your initials on the message so the person receiving the message can ask questions if anything is not clear.

### Exercise:

Use the guidelines above to role play the following scenario with your partner. Choose one person to play each of the characters, making sure to follow the instructions for your character. Remember to switch roles so each of you leaves and answers a message.



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**Scenario 1:** Jane Snyder from Stellar Sound Productions calls Sam's Electronics to speak with Debra Myers, the store manager. Ms. Myers is not currently available

Jane Snyder (leaves message)

You will leave a message for Debra Myers to let her know that you have a new line of stereo speakers available. You would like to know if Ms. Myers would be interested in selling them at Sam's Electronics.  
Leave your number: 555-654-3403

Tim (takes message)

You will let the caller know that Ms. Myers will be out of the office until tomorrow morning. You will have her call back then.

**Scenario 2:** Anthony Roberts from After School Expressions calls Ellen Margrave at the Green Street Gallery to speak about a community art show they are coordinating. Mr. Roberts is not available at the moment.

Anthony Roberts (leaves message)

Leave a message asking if Mrs. Margrave knows where you can get 15 extra tables for the event. Ask when Mrs. Margrave will be back in the office. Leave your number: 555-862-3124.

Sandra Williams (takes message)

Take the message, and inform the caller that Mrs. Margrave will be back in later this afternoon.