



TELEPHONE RECEPTIONIST PROCESS

Designed As A Supplement to Basic Telephone Skills

- 1) Designated Manager directs person to act as Receptionist to answer phone.
- 2) Receptionist proceeds to workstation. Verifies area is clean, free of puzzles, magazines, trash, etc..
If area is dirty, Receptionist cleans up area and puts away items.
- 3) Verify Receptionist has note pad, ink pen.
If not, get note pad or pen from Office.
- 4) Verify Receptionist has basic Dealership information. (FAX numbers, address, email, web address, hours of operation, directions from multiple locations, names of Associates, planned holiday closings, etc.)
If not, consult with Office Manager to update information.
- 4) Verify proper operation of phone, intercom, and voicemail. Also verify time and date is correct on phone system.
If not operating correctly, call your Manager or Zenith Communications in Columbia.
- 5) Check personal voice mail. Respond accordingly.
- 6) Verify Receptionist has all voice mail codes, proper extensions, and understands full operation of the phone system. Review phone operation manual throughout the shift if appropriate to learn new features of the system.
- 7) Survey Department Managers for a list of Associates not present, in meetings or helping Clients. Keep a running list of Associates unavailable to take calls. Also note times later in the day when Associates may be unavailable.
- 8) Check you attitude, appearance and posture. Callers can 'see' you through the phone. Smile, sit properly and stay focused on your job and the Callers who need your help!
- 8) Check phone system for holding calls or ringbacks. Identify those holding according to step #15.
- 9) Monitor system for incoming phone calls. When phone sounds, answer quickly but certainly to the extent possible before three rings with "Thank you for calling *Dealership Name*. How may I direct your call?" Note the proper *Dealership Name* to use based on which line rings in for those stores with multiple franchises.
- 10) If Caller asks for a specific person or Department and they are available, respond "My Pleasure" or "Please hold while I transfer you" or "Please hold while I page him/her/them." Place the Caller on hold, dial the appropriate paging/intercom/extension zone and in a clear, audible voice say, "*Party*, Line X, *Party*, you have a call holding on Line X" (or words very similar) where *Party* is the Department or person you are paging and X is the line number that is holding for them. People should be paged either by their full name or by their last names with salutations. (i.e. Bob Jones or Mr. Jones, not Bobby). Note even when using the intercom Clients may be present, so do not be too informal when ringing someone internally. Sales, Service & Parts calls should note the exact type of call if possible: "Acura Sales, Line 4" or "Certified Sales, Line 8" or "Porsche Parts, Line 9." When paging, the Receptionist should usually repeat the page for clarity's sake.
- 11) If the Party is unavailable, explain they are unavailable. It is not necessary to give detailed information as to the Party's unavailability (i.e. They are in the bathroom, He is at a funeral, He is being reprimanded). It is acceptable to explain when you believe the Party will return. Never give out personal numbers, home numbers, home addresses or cell numbers of any employee, nor should you divulge the Associates' location outside of the Dealership (i.e. He is having lunch at Outback or She is vacationing in Hilton Head at the Marriott). It is acceptable to offer the Party's company email address.
- 12) If Caller asks for brief information that you can provide, do so (See #4). Do not attempt to become an expert on the models we carry, how much services cost, if we are hiring, etc. Do not stay on the phone in a conversational mode to the detriment of other calls or ringbacks. Feel free to place "information seekers" on hold to attend to ringbacks or incoming calls. After you have provided the basic information, ask if there is anything else you could assist them with.

- 13) If Caller is making a personal call to you, invite them to call back during your scheduled break or lunch hour unless it is an emergency. Emergency calls should be infrequent and limited in scope and duration.
- 14) If the Caller is upset, listen, let them speak, and suggest the quickest resolution to their problem is addressing it either with the party with whom they are upset or a representative from the Department with whom they are upset. Do not immediately route all complaint calls to the highest level of management since they are often the most ill-equipped to address the concern. It is important that you do not become emotional during the call. Remember, the Caller is upset at the situation, not you. Take a deep breath and focus on your end goal of routing the Caller to the Party at the Dealership who can most expeditiously resolve their situation. Do not take sides in the dispute. Do not overly involve yourself. Validate and empathize with the Caller's emotional state "I understand you are upset" or "I can understand your concerns." Attempt to route the call to the best party to address the Callers' concerns as quickly as possible without further upsetting the Caller. Do not promise the Caller something you are unable to deliver nor accept blame on behalf of the Dealership. Your role as Reception is the facilitation of communication between parties, not to become one of those parties. If a suitable member of Management is unavailable to speak with them, offer to allow them to continue to hold, leave a voicemail message, direct the call to an alternate source, provide a direct email address or take a written message to more expeditiously alert the appropriate Manager when they are free. Use your own experiences; it is not always possible to speak with an authority figure immediately. Putting yourself on the Client's side will normally work to ally their concerns; realize there are limitations to the things we can all accomplish.
- 15) If the call is of a nature that is an emergency to the well-being of the Company, especially if it involves law enforcement, bodily danger to an Associate or Client, physical damage to the Dealership or Dealership-owned equipment, or other extraordinary matters, the Receptionist should attempt to contact any member of Management including the Dealer via cell phone or other means. These numbers should not be given out to the public. The Receptionist should not explicitly tell the caller they are attempting to contact Management by these means, nor promise that Management will "immediately" call them back.
- 14) If the Caller is interrupted, attempt to verify that our phone system is operating correctly. If there is an instance of a mechanical malfunction, let all incoming callers know we are experiencing difficulties and there is a chance they could be inadvertently disconnected. See Step #4.
- 15) Monitor the line so that the Caller is not kept holding for longer than 1 minute. Keep conversations with other Associates or Clients to a minimum since it could easily distract you from a ringing phone.
- 16) As calls are answered, wait for the next call and continue monitoring other calls. See Step #9.
- 17) If call is not answered, pick up after one minute or ring back whichever occurs first and say " I apologize for keeping you on hold, would you like to continue to hold for *Party*, would you care to leave a message, would you like the Party's direct email address or could someone else assist you?"
 - a) If they choose to continue hold, see Step 10.
 - b) If they choose to leave a message inquire to see if they prefer voice mail or whether the Caller prefers you to take a written message. Some people refuse to use voicemail, and you should respect their wishes. Please note that the Dealer, Mr. McDaniels does not use voice mail, so all messages should be taken by hand for him. If yes transfer, if no offer to take a written message. Be sure to forward the message to the appropriate party at the earliest time possible.
 - c) Keep email addresses close by to provide if the Caller requests.
 - d) Ascertain who could help them a go to Step 10.
- 19) Should you need to leave your station, keep an ear and eye out for incoming calls and ringbacks. Continue to monitor the phone from remote locations. Before taking breaks, verify someone will watch the phone for you and brief them on the Callers who are currently on hold.
- 20) Leaving your station for your shift, verify the phone is on the proper ring mode, make sure your workstation is tidy, and brief either a manager or whomever is taking your position as to the status of any call remaining on hold.