

Telephone and Helpdesk Skills

*Adrian
Wallwork*

*A Guide to
Professional
English*

Guides to Professional English

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Adrian Wallwork
Pisa, Italy

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A Guide to Professional English



Springer

Adrian Wallwork
Pisa
Italy

ISBN 978-1-4939-0637-6 ISBN 978-1-4939-0638-3 (eBook)
DOI 10.1007/978-1-4939-0638-3
Springer New York Heidelberg Dordrecht London

Library of Congress Control Number: 2014939423

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Printed on acid-free paper

Springer is part of Springer Science+Business Media (www.springer.com)

Introduction for the reader

Who is this book for?

If you make telephone calls as part of your work, then this book is for you. Whether you work on reception, on a helpdesk, or simply telephone colleagues and clients, by applying the suggested guidelines, you will stand a much greater chance of making an effective telephone call.

The book is aimed at non-native English speakers, with an intermediate level and above.

I hope that other trainers like myself in Business English will also find the book a source of useful ideas to pass on to students.

This book is NOT for academics. Instead, read Parts III and IV of *English for Academic Correspondence and Socializing* (Springer Science), from which some of the subsections in this book are taken or adapted.

What chapters should I read?

Receptionists / Switchboard Operators and Secretaries: Chapters 1-9, 14-18

Helpdesk / Technical: 1, 5, 8-12, 14-18

Sales and Marketing: 1-4, 6-9, 13-18

If you use the telephone for video conferences and audio conferences, read Chapter 16 of this book plus Chapter 6 (video conference calls) in the companion book *Meetings, Negotiations, and Socializing*, and Chapter 12 (audio conference calls) in *Presentations, Demos, and Training Sessions*.

Video conference calls - Chapter 6 in *Meetings, Negotiations and Socializing*

Audio conference calls - Chapter 12 in *Presentations, Demos and Training Sessions*

How should I use the table of contents?

The table of contents lists each subsection contained within a chapter. You can use the titles of these subsections not only to find what you want but also as a summary for each chapter.

Other books in this series

There are currently five other books in this *Guides to Professional English* series.

CVs, Resumes, and LinkedIn

<http://www.springer.com/978-1-4939-0646-8/>

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All the above books are intended for people working in industry rather than academia. The only exception is *CVs, Resumes, Cover Letters and LinkedIn*, which is aimed at both people in industry and academia.

There is also a parallel series of books covering similar skills for those in academia:

English for Presentations at International Conferences

<http://www.springer.com/978-1-4419-6590-5/>

English for Writing Research Papers

<http://www.springer.com/978-1-4419-7921-6/>

English for Academic Correspondence and Socializing

<http://www.springer.com/978-1-4419-9400-4/>

English for Research: Usage, Style, and Grammar

<http://www.springer.com/978-1-4614-1592-3/>

INTRODUCTION FOR THE TEACHER

Teaching Business English

I had two main targets when writing this book:

- non-native speakers (business, sales technical)
- Business English teachers and trainers

My teaching career initially started in general English but I soon moved into Business English, which I found was much more focused and where I could quickly see real results. The strategies I teach are almost totally language-independent, and many of my 'students' follow my guidelines when making phone calls (writing emails, presenting etc) in their own language. I am sure you will have found the same in your lessons too.

Typically, my lessons cover how to:

1. make phone calls
2. write emails
3. make presentations and demos
4. participate in meetings
5. socialize

This book is a personal collection of ideas picked up over the last 25 years. It is not intended as a course book; there are plenty of these already. It is more like a reference manual.

I also teach academics how to interact with colleagues around the world. In fact, a couple of the chapters in this book are based on chapters from *English for Academic Correspondence and Socializing* (Springer).

How to teach telephone calls

I suggest you adopt the following strategy.

In your first lesson on telephoning, have a general discussion on:

- how much time your students spend on the telephone
- what their main fears are and how they manage to overcome them
- what typical calls they have to make / receive
- what useful phrases (Chapter 16) they know, and whether they have made their own personal collections of such phrases
- what preparation, if any, they make before making / receiving phone calls

Use ideas from Chapter 1 to help you guide the last part of the discussion.

In my experience the basic problems are:

1. lack of preparation
2. not knowing the right phrases to use
3. inability to understand the caller
4. nerves

Nerves are caused by points 1 - 3.

To resolve POINT 1, you need to help your students learn how to simulate a call in advance (see Chapter 1.5). The best way to do this is to choose two students who do a similar job e.g. they both work on reception, or both work on the helpdesk. Get them to think of the typical calls they make (in English and in their own language). Then ask them to simulate the call in their own language. Make notes of the structure of the call, while the two students are talking. Then gradually build up the same dialog in English (either on your laptop or the whiteboard) - refer to your notes to make sure that you don't forget to include something. On the basis of this dialog, they can then practise what to say. It makes sense at this stage of your telephoning course to have very small groups of people all of whom do the same job, otherwise some of the dialogs will be totally irrelevant for other students.

Resolving POINT 1 goes some way to resolving POINT 2 at the same time. While building up the dialogs, introduce useful phrases from Chapter 16. Encourage students to learn the phrases that they find the easiest to remember and easiest to say. But they need to be aware of the other phrases in case their interlocutor uses them.

POINT 3 - inability to understand the caller - is certainly the biggest problem. Firstly, students need to understand that a conversation is two way. If they don't understand something the responsibility is not entirely their own, but also rests with their interlocutor. It is worth stressing this concept many times to ensure that your students do not feel stupid or humiliated when they don't understand the caller. Instead, they should remain calm and adopt a series of strategies (Chapter 11) to help them try and understand the caller better. Chapter 12 (on pronunciation and word stress) and Chapter 13 (using the web to improve listening skills), will also help them understand better. You can also use the listening exercises contained in the many telephone skills books produced by ELT publishers such as CUP, OUP, Macmillan and Longman.

If you work in-house, then you can help your students massively if you listen in on their calls. When you debrief them after the call, you can then help them to improve their technique. So get involved with the company / companies where you teach. You will find it much more satisfying!

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1 PREPARING FOR CALLS

1.1 Before calling, decide whether another form of communication might be more suitable

First, consider whether your phone call is really necessary. Decide whether it wouldn't be simpler, at least for your counterpart, for you simply to send an email or fax.

It is generally a good idea to speak to someone directly on the phone rather than send an email:

- if you want to establish a good relationship
- to solve any misunderstandings that have already arisen via email

You are unlikely to have the person's full attention if you call them on their mobile: you may well be disturbing them in the middle of something else. It is generally a good idea to ask:

Is this a good time or are you in the middle of something?

Am I interrupting something?

If they then say *Well, actually I am with someone at the moment. But go ahead, what can I do for you?* it is probably best to call back later and say:

Sorry, I have obviously got you at an inconvenient time. What time do you think I could call you back?

1.2 Use email as a preliminary information exchange before the call

The more both parties are prepared for a telephone call, the more likely the call will be successful. If you have a call that will require a complex discussion, send each other a list of points that you wish to discuss. This will enable you to:

- think about what you need to say and how to say it
- think about what useful phrases in English you may need
- tick the items from the list as you discuss them, and make notes next to each item

You could suggest such an email exchange by writing:

Before we make our call, I thought it might be useful to send you this list of items that I would like to discuss. If you have any additions I would be glad to receive them. Then it would be great if you could give me a few hours to look through them. Thank you.

1.3 Accept that you might feel nervous: prepare and practice

It is perfectly normal to feel anxious about making or receiving a phone call. It may help you to know that your interlocutor too may be feeling nervous!

Do some breathing exercises to calm your nerves before you make / receive the call.

Reassure yourself that if you don't understand anything, you can always clarify issues via email.

You will certainly feel less nervous about making a call if you prepare some notes about what you want to say, and then make sure you know how to say everything in English.

Think about what the other person might ask you, and prepare answers to such questions. If you do so, you are more likely to be able to understand the question when it is asked.

It is important not only to practise what you want to say, but to prepare for what you might hear, for example the typical phrases that a switchboard operator or secretary might say.

Could you tell me what it is in connection with?

Has she spoken to you before?

I'll just check for you. Could you hold for a moment?

1.4 Simulating, recording and transcribing telephone calls

It is very useful to simulate and record (i.e. with audio) possible future telephone conversations. You can do this with a colleague or with your English teacher, either in your own language or in English. You can then transcribe / translate what you said, and make improvements to it. Possible improvements include:

- giving more precise and concise explanations
- giving more details in case these are required
- asking better formulated questions
- perfecting the English grammar, syntax and vocabulary
- choosing words that are easy for you to say
- keeping everything as simple as possible

Depending on your role in the conversation, i.e. whether you will primarily be asking or answering questions, you will either need to write questions or think of answers to questions.

If you have prepared the questions in advance, you:

- are more likely to hear them and understand the questions when they are asked
- will seem very professional because you will have clear concise and detailed answers to the questions
- will be more fluent and confident when you speak

1.5 Making a good first impression

We tend to form first impressions very quickly. In just a few seconds we decide whether we think someone is professional / competent or not, whether we feel we will be listened to or not, and whether we like a person or not. Even in a non-video call where we cannot see the other person, we still create a mental picture of them. And of course, the other person forms a picture of us too.

This impression extends from us to our organization. When you make a call, you are reflecting the organization you work for.

However, on the telephone we lose some of the clues to evaluating someone that we would have when we talk to someone face to face. This means that we cannot see the expression on our interlocutor's face, or their reactions to what we say. So we may reach the wrong conclusions in the same way as we often misinterpret the tone of an email.

But not seeing our interlocutor has advantages too.

Our interlocutor cannot see if you are looking really nervous. They cannot see if you are desperately trying to find the answer to their question by scrolling pages on your computer.