

# *Telephone and Helpdesk Skills*

***Adrian  
Wallwork***

*A Guide to  
Professional  
English*

# Guides to Professional English

**Series Editor:**  
Adrian Wallwork  
Pisa, Italy

For further volumes:  
<http://www.springer.com/series/13345>

Adrian Wallwork

# Telephone and Helpdesk Skills

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

© Springer Science+Business Media New York 2014

This work is subject to copyright. All rights are reserved by the Publisher, whether the whole or part of the material is concerned, specifically the rights of translation, reprinting, reuse of illustrations, recitation, broadcasting, reproduction on microfilms or in any other physical way, and transmission or information storage and retrieval, electronic adaptation, computer software, or by similar or dissimilar methodology now known or hereafter developed. Exempted from this legal reservation are brief excerpts in connection with reviews or scholarly analysis or material supplied specifically for the purpose of being entered and executed on a computer system, for exclusive use by the purchaser of the work. Duplication of this publication or parts thereof is permitted only under the provisions of the Copyright Law of the Publisher's location, in its current version, and permission for use must always be obtained from Springer. Permissions for use may be obtained through RightsLink at the Copyright Clearance Center. Violations are liable to prosecution under the respective Copyright Law.

The use of general descriptive names, registered names, trademarks, service marks, etc. in this publication does not imply, even in the absence of a specific statement, that such names are exempt from the relevant protective laws and regulations and therefore free for general use.

While the advice and information in this book are believed to be true and accurate at the date of publication, neither the authors nor the editors nor the publisher can accept any legal responsibility for any errors or omissions that may be made. The publisher makes no warranty, express or implied, with respect to the material contained herein.

Printed on acid-free paper

Springer is part of Springer Science+Business Media ([www.springer.com](http://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/>

*Email and Commercial Correspondence*

<http://www.springer.com/978-1-4939-0634-5/>

*User Guides, Manuals, and Technical Writing*

<http://www.springer.com/978-1-4939-0640-6/>

*Meetings, Negotiations, and Socializing*

<http://www.springer.com/978-1-4939-0631-4/>

*Presentations, Demos, and Training Sessions*

<http://www.springer.com/978-1-4939-0643-7/>

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!

# Contents

<b>1 PREPARING FOR CALLS</b> .....	1
1.1 Before calling, decide whether another form of communication might be more suitable .....	1
1.2 Use email as a preliminary information exchange before the call .....	2
1.3 Accept that you might feel nervous: prepare and practice.....	2
1.4 Simulating, recording and transcribing telephone calls .....	3
1.5 Making a good first impression .....	4
1.6 If you receive a call, don't be afraid to tell the caller that this is a bad time to talk .....	5
Preparing for the call: Summary .....	6
<b>2 MAKING A CALL</b> .....	7
2.1 Give your name and the name of the person you want to talk to.....	7
2.2 When you have been connected, explain who you are and the reason for your call .....	8
2.3 Take notes, summarize and follow up with an email.....	9
2.4 What to do if your English is high level but your interlocutor's is low level .....	10
Making a call: Summary .....	11
<b>3 LEAVING A MESSAGE WITH THE SWITCHBOARD OPERATOR</b> .....	13
3.1 Learn the structure and typical phrases of a telephone message .....	13
3.2 Speak clearly and slowly .....	15
3.3 Make the call as interactive as possible .....	15
3.4 Spell names out clearly using the International Alphabet or equivalent.....	16
3.5 Practice spelling out addresses .....	18
3.6 When spelling out telephone numbers, read each digit individually .....	20

- 3.7 Consider sending a fax, rather than an email, confirming what has been said ..... 20
- Leaving a telephone message: Summary ..... 21
- 4 VOICEMAIL AND ANSWERING MACHINES** ..... 23
  - 4.1 Use an appropriate voicemail ..... 23
  - 4.2 Leaving a message on someone's answering machine ..... 25
  - Voicemail and answering machines: Summary ..... 26
- 5 RECEIVING CALLS: WORKING ON RECEPTION / SWITCHBOARD** ..... 27
  - 5.1 Initial salutations ..... 27
  - 5.2 Transferring the call for a client ..... 28
  - 5.3 Transferring the call for a colleague: informal version ..... 30
  - 5.4 Transferring the call for a colleague: more formal version ..... 31
  - 5.5 Creating a friendly relationship with colleagues ..... 31
  - 5.6 Choosing the easiest phrase to say ..... 32
  - 5.7 Use of *will* and present perfect ..... 33
  - 5.8 Being proactive and helpful ..... 34
  - 5.9 Adopting a friendly tone ..... 35
  - 5.10 Taking a message ..... 36
  - 5.11 Dealing with wrong numbers ..... 37
  - Receiving a call: Summary ..... 38
- 6 FINDING OUT ABOUT ANOTHER COMPANY, GIVING INFORMATION ABOUT YOUR COMPANY** ..... 39
  - 6.1 Responding to a caller who wants information about your company ..... 39
  - 6.2 Calling a company to find out information about that company ..... 41
  - 6.3 Calling someone in a company to make a cold sale ..... 41
  - Finding out about another company, giving info about your own company: Summary ..... 43
- 7 CHASING** ..... 45
  - 7.1 Chasing a payment ..... 45
  - 7.2 Chasing an order ..... 49
  - 7.3 Chasing a document, report etc ..... 50
  - Chasing: Summary ..... 52
- 8 DEALING WITH DIFFICULT CALLERS AND UNHELPFUL STAFF** ..... 53
  - 8.1 Dealing with people who are trying to sell you a product / service that your company is not interested in ..... 53
  - 8.2 Dealing with people who are waiting for a response from someone within the company but have had no reply ..... 54

8.3	Switchboard: dealing with a client who wants to register a complaint .....	56
8.4	Person responsible: dealing with a client who has received poor service .....	57
8.5	Dealing with rude callers.....	58
8.6	Dealing with unhelpful staff when you are the caller.....	59
	Dealing with difficult callers and unhelpful staff: Summary .....	60
<b>9</b>	<b>IMPROVING YOUR TELEPHONE MANNER .....</b>	<b>61</b>
9.1	Avoid being too direct .....	61
9.2	Help the person that you want to speak to .....	62
9.3	Speak slowly and clearly .....	62
9.4	Don't be afraid to interrupt and make frequent summaries of what you think you have understood.....	63
9.5	Compensate for lack of body language .....	63
9.6	Learning to sound authoritative and competent .....	64
9.7	Evaluate your performance.....	65
	Improving your telephone manner: Summary .....	66
<b>10</b>	<b>WORKING ON A HELPDESK: KEY ISSUES .....</b>	<b>67</b>
10.1	Do not panic. Listen to the full explanation before reacting.....	67
10.2	Admit that you have not understood .....	69
10.3	Improve your pronunciation.....	69
10.4	Ask the caller to speak more slowly.....	69
10.5	Check whether the caller has a single problem or a multiple problem.....	70
10.6	Prepare possible customer questions and solutions to these questions .....	70
	Key helpdesk issues: Summary .....	71
<b>11</b>	<b>HELPDESK: DEALING WITH CUSTOMERS .....</b>	<b>73</b>
11.1	Dealing with a customer's problem: a ten-step solution .....	73
11.2	What to say while the customer is explaining the problem.....	75
11.3	Using questions to identify the problem.....	76
11.4	Interrupting and repeating back what the customer tells you.....	77
11.5	Suggesting possible causes and solutions: expressing certainty through adverbs and modal verbs .....	79
11.6	Giving instructions to the customer.....	80
11.7	Telling the customer what you need from them and what the next step will be.....	81
11.8	Showing the customer that you care .....	82
11.9	Follow up with an email .....	83
	Helpdesk – dealing with customers: Summary .....	84

- 12 CALLING A HELPDESK**..... 85
  - 12.1 Facilitating a smooth service from the helpdesk operator ..... 85
  - 12.2 How to interact with a helpdesk operator who has very poor English..... 87
  - Calling a helpdesk: Summary..... 88
  
- 13 PARTICIPATING IN AUDIO AND VIDEO CONFERENCE CALLS**..... 89
  - 13.1 Audio conference calls..... 90
  - 13.2 Preparing for a conference call..... 91
  - 13.3 Introducing yourself ..... 92
  - 13.4 Dealing with technical and documentation problems ..... 93
  - 13.5 Checking for clarifications during the call ..... 94
  - 13.6 Ending the call ..... 95
  - 13.7 Skype calls..... 96
  - Participating in audio and video conferences: Summary ..... 97
  
- 14 WHAT TO DO AND SAY IF YOU DON'T UNDERSTAND** ..... 99
  - 14.1 Foreign language skills of native English speakers..... 99
  - 14.2 Ignoring words and expressions that you don't understand ..... 101
  - 14.3 Don't say 'repeat please' ..... 103
  - 14.4 Choose the quickest and easiest way to indicate exactly what you don't understand ..... 105
  - 14.5 More examples of asking for clarification and making comments ..... 106
  - 14.6 Distinguish between similar sounding words ..... 108
  - 14.7 Use instant messaging systems ..... 109
  - 14.8 If you really can't understand, learn a way to close the call ..... 109
  - 14.9 Reasons why understanding a native English speaker can be difficult ..... 110
  - Improving your understanding of what the caller is saying: Summary ..... 114
  
- 15 USING THE WEB AND TV TO IMPROVE YOUR LISTENING SKILLS**..... 115
  - 15.1 Set yourself a realistic objective ..... 115
  - 15.2 The news ..... 116
  - 15.3 YouTube..... 116
  - 15.4 Dragon's Den..... 116
  - 15.5 TV series..... 117
  - 15.6 TED..... 118
  - 15.7 Movies ..... 119
  - 15.8 Subtitles ..... 120
  - 15.9 Songs..... 120

15.10	Audio books and podcasts.....	120
15.11	Other websites worth checking out.....	120
	Using the web and TV to improve your listening skills: Summary....	121
<b>16</b>	<b>PRONUNCIATION: WORD AND SENTENCE STRESS .....</b>	<b>123</b>
16.1	Investigate free software that will help you to improve your pronunciation .....	123
16.2	Two syllables: general rules.....	125
16.3	Two syllables: same word (noun on first, verb on second)....	126
16.4	Compound nouns .....	126
16.5	Three syllables.....	127
16.6	Multi-syllable words .....	128
16.7	Acronyms.....	128
16.8	Sentence stress.....	129
<b>17</b>	<b>EXAMPLE TELEPHONE DIALOGS .....</b>	<b>131</b>
17.1	Switchboard operator: trying to connect someone .....	131
17.2	Switchboard: Taking down someone's name and number ....	132
17.3	Switchboard: checking understanding.....	133
17.4	Switchboard operator: chit chat.....	133
17.5	Switchboard: dealing with an employee who rings in sick....	134
17.6	Switchboard: giving out a phone number .....	135
17.7	Switchboard: dealing with a caller whose request you cannot fulfill.....	136
17.8	Leaving a message with the switchboard.....	136
17.9	Arranging a meeting.....	137
17.10	Changing the time of a meeting.....	137
17.11	Sales division: Dealing with a customer inquiry.....	138
17.12	Making an enquiry about a company.....	140
17.13	Outlining / Solving technical problems 1.....	141
17.14	Outlining / Solving technical problems 2.....	141
17.15	Outlining / Solving technical problems 3.....	142
17.16	Extracts from a conference call .....	143
<b>18</b>	<b>USEFUL PHRASES .....</b>	<b>145</b>
18.1	Switchboard: saying / establishing who is calling .....	145
18.2	Calling: saying who you are and who you want to speak to ..	148
18.3	Calling: when person desired is not available.....	149
18.4	Initiating the call with the desired person.....	151
18.5	Leaving a message.....	151
18.6	Taking a message.....	153
18.7	Problems with understanding .....	154
18.8	Checking and clarifying.....	155
18.9	Calling someone you already know: giving background to your call / updating.....	156

- 18.10 Calling someone back ..... 159
- 18.11 Requests / enquiries ..... 159
- 18.12 Cold calling (calling a company for the first time)..... 161
- 18.13 Making a complaint, registering a problem, calling a helpdesk.... 162
- 18.14 Helpdesk: finding out about the problem ..... 163
- 18.15 Helpdesk: dealing with a problem..... 164
- 18.16 Helpdesk: checking that you have both understood each  
other ..... 165
- 18.17 Helpdesk: summarizing the problem, outlining a solution ..... 166
- 18.18 Being a good listener: reassuring and empathizing ..... 167
- 18.19 Apologizing ..... 168
- 18.20 Thanking..... 169
- 18.21 Arranging a meeting for yourself..... 169
- 18.22 Arranging a meeting for a colleague..... 171
- 18.23 Hotel reservations..... 172
- 18.24 Saying goodbye..... 173
  
- THE AUTHOR** ..... 175
  
- Index** ..... 177

# 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