

Checklist telephone conversations



1 Preparation

- Think about the desired outcome, who you will be speaking to and what you want to say.
- Create a list of points that need to be raised during the conversation.
- Make sure to have any documents or information at hand that you might need.

2 Greeting

- Greet politely.
- Identify yourself (when making a call).
- Ask for identification (when receiving a call).
- Make polite enquiries (optional).
- Ask whether this is a convenient time for calling (when making a call).

3 Getting to the point

- Briefly explain the reason for calling (when making a call).
- Ask how you can help (when receiving a call).
- Explain that you will transfer or put someone on hold before doing so.

4 Discussing

- Clearly express your opinion.
- Politely ask for clarification.
- Politely agree or disagree.
- Make polite suggestions and recommendations.
- Be ready to politely interrupt someone who is rambling on.
- Take notes of key information.
- Offer to spell difficult words or names.
- Check your understanding by repeating names and numbers.

5 Summarising

- Repeat the main points discussed and any agreements.
- Indicate what will happen next.
- Politely express urgency or importance.

6 Closing

- Check whether you have all necessary information, such as contact details.
- Thank the caller or recipient for their time.

7 Style and tone

- Use a friendly and relaxed tone.
- Use plenty of polite phrases and tentative, indirect verbs.
- Listen attentively and use encouragements to indicate that you are listening.
- Be clear and concise.
- Speak deliberately and use sufficient pauses.