

TELEPHONE TECHNIQUES

Good telephone skills are important because:

1. The caller is counting on you for help.
2. The person in distress needs to know you are listening.
3. The caller must have confidence that the information you are giving is correct.
4. Incomplete messages could have serious consequences.
5. You represent the Ombudsman Program and are an advocate for the resident.

Tips for Good Telephone Techniques:

1. Answer the phone promptly. Callers may get discouraged after several rings and hang up.
2. Identify yourself, "Ombudsman Program. (your name) speaking. "
3. Be friendly and helpful. Be positive and project a professional image.
4. Speak clearly. Talk at a pace that is easy to understand.
5. Listen carefully. Be attentive.
6. It may be helpful to devise a telephone contact sheet containing standard questions, and keep a supply at each telephone for easy reference.
7. Ask for specific information from each caller, and write down the information as it is being given to you.
 - a. Name. (Ask the caller to spell his or her name.)
 - b. Phone number including the area code.
 - c. Facility, city, county.
 - d. Reason for the call. Wait for the caller to explain the reason rather than make assumptions.
 - e. Is this an emergency, a request for a routine ombudsman visit or a call for information?
8. Verify all information by reading it back. Ask, "Is this correct?" Ask for the spelling of names, if necessary.
9. If you must place a person on hold, explain exactly what you are doing and how long it will take.
10. Be attentive to any caller you put on hold. If someone is on hold for more than one or two minutes, return to the caller and state how much longer it will be before the call will be accepted. Ask if the caller wishes to remain on hold or would prefer to have someone return the call.
11. If an individual is noticeably upset, or is calling about a crisis situation, avoid putting the person on hold. Get his or her information immediately. If possible, ask other phone staff to take other calls so you can attend to the caller with the crisis.

12. If a specific staff person is not available, be tactful. For example, say, "Sandy is away from her desk. May I have her call you when she returns?" Statements such as "Sandy is out to lunch," "Sandy is on her break," or "Sandy is not yet in," are not considered professional responses.
13. Be patient and pleasant.
14. Be sure your rosters and referral numbers are up-to-date and are accessible. Routinely verify referral numbers with the local information and assistance agencies.
15. Know when to end a conversation. Be polite, but firm, if a conversation lasts too long. If required, politely remind the caller that other callers may be waiting for service.
16. When making a referral, ask if the caller has a pencil and paper available to write down phone numbers. It may be necessary to wait while the caller finds writing materials.
17. If you tell a caller that someone will be calling back within a certain period of time, and no one is available at the time, call back yourself, and explain that there has been a delay and when a call can be expected.
18. If the caller is stressed, remain calm. The caller may not be angry or frustrated with you, but may be upset by frustrating circumstances.
19. Callers may have called several other numbers or agencies to obtain assistance. Ombudsman Program staff should do everything possible to ensure the caller is connected to the person or program that can provide help.
20. If a speech impairment or language barrier makes it difficult or impossible to understand the caller, the following techniques may help.
 - a. Keep your voice calm and be patient. Ask the caller to repeat the information.
 - b. Ask direct questions to which the client can respond with a yes or no, such as,
 - "Do you live in a nursing home or assisted living facility?"
 - "Is this call an emergency?"
 - "Are you currently in danger?"
 - "Do you want to see an ombudsman?"
 - c. If you are unable to understand the caller after several attempts, ask if he/she will spell the information you need (i.e., name, facility name or problem).
 - d. Be honest with the caller. If you absolutely cannot understand, say "I'm sorry, I cannot understand you." Ask if there is someone else who can explain/translate what it is the caller needs to tell you.
21. Practice our "Golden Rule" Treat callers as you would want to be treated if you were in their situation!