

Process Information

Process Name:	Answering the Phone
Purpose:	The purpose of this process is to answer the telephone in a timely and consistent manner. Answering the phone is a very important task as it provides a first and lasting impression of the company.
Resources:	Office Phone/Mobile Phone/Infusionsoft (IS)
Role:	General Office Staff
Department:	Administration
Frequency:	When there is an incoming call
Process Triggers:	When there is an incoming call

Process Checklist / Quick Reference List:

1. Greet the caller with company name and identify person speaking
2. For sales enquiries, transfer the call to the most appropriate team member
3. In the event that the Sales Manager is not available, take down information
4. Advise the caller appropriately
5. Enter the information provided by the caller into IS
6. Notify the Sales Manager as soon as possible and set up a task in IS for the Sales manager to follow up

Process Details

Task	Details
1.	<p>Greet the caller with company name and identify person speaking.</p> <p>E.g.: Welcome to XYZ company, this is (insert name) .</p> <ul style="list-style-type: none"> • Saying your name last allows it to be remembered by the caller. • Practice using a clear voice that is loud enough to be heard and keep your tone friendly and welcoming. • Smile when you answer the phone as this makes your voice sound positive and upbeat. <p>If another line is ringing, put the existing call on hold then pick up the new call.</p> <p>Generally most incoming calls are for sales enquiries.</p>
2.	<p>For sales enquiries, transfer the call to the most appropriate team member. In most cases sales enquiries are deal with by the Sales Manager.</p> <p>E.g.: “I’m putting you through to (first name) who is our Sales Manager, he/she will be able to help you, just a moment please”.</p>
3.	<p>In the event that the Sales Manger in not available, take down some information from the caller as follows:</p> <ul style="list-style-type: none"> • Full name of caller • Company name and industry • Nature of the call (service type they are enquiring about) • Best phone number to call back on • Best time to call back on <p>Listen carefully to the caller’s request to establish the purpose of the call.</p> <p>E.g. “I’m sorry, (first name) our Sales Manager is currently unavailable. If I could take down some information from you now, (first name) will get back to you (indicate when). Thank you”.</p>
4.	<p>Advise the caller that the best person to answer their enquiry is the Sales Manager and indicate approximately how long to expect a call back.</p>
5.	<p>Enter the information provided by the caller into IS. In IS, select “Prospect” from the drop down menu.</p>
6.	<p>Notify the Sales Manager as soon as possible and set up a task in IS for the Sales Manager.</p>

	<p>Note: All enquiries should be contacted back promptly. If the whereabouts of the Sales Manager is know and contactable, use the quickest form of contact, preferably the phone.</p> <p>If the Sales Manager is not contactable or will be unavailable for a period of time, notify the next most suitable team member to handle the enquiry.</p> <p>Note: It is the responsibility of the person who takes the call to ensure that the caller has been contacted back.</p>
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Expectations and Timings

	Expectations
1.	The call is answered professionally and promptly.
2.	Sales enquiries are transferred to the Sales Manager to answer or if not he/she is available, details are taken in order for the Sales Manager to contact the caller at a later time.

Approved by:	
Reviewed date:	

Issues and Improvements
