



Note: If printed, this document is for immediate reference only. Do not file it, as it will go out-of-date over time and be replaced by newer versions on-line. Always refer to the latest CMS version.

This protocol provides guidance primarily on telephone usage – however this does include guidance re both voicemail and out of office messages which should be adhered to by both staff and Managers.

Our standards

When communicating by telephone, we are expected to:

- Answer at least 80% of calls within 5 rings.
- Greet callers in a welcoming and professional manner using a corporate greeting.
- Take personal responsibility for the call ensuring that any follow-up actions are agreed with the customer and arranged.
- Comply with voicemail requirements, when it has to be used.
- Ensure that if you are away from your phone, you have made suitable arrangements for your phone calls to be picked up or forwarded on to another number.

What is an appropriate corporate greeting?

A corporate greeting is how the council expects and requires staff to answer the telephone, whether they are answering a call from an internal colleague or an external customer.

It is, ***"Good Morning/Good Afternoon, Department or Section, How may I help you?"***

You may also give your name if this is appropriate to your work area. Check with your Line Manager if you are unsure if it is appropriate to give your name.

Why should I use a corporate greeting?

- Using a corporate greeting gives a professional impression of the council.
- The corporate greeting lets callers know that they have come through to the correct part of the council

Dealing with calls

No telephone should be left unanswered. If someone is unavailable, you should take responsibility for answering the phone yourself. A number of the complaints handled each year are around difficulty contacting people.

When handling customer enquiries give your name and contact details. If for reasons of personal security you cannot give your name, your manager will advise you what to do.

- A simple clear welcome will indicate that you are there to help the caller.
- Giving your name and contact details helps build rapport with the customer.
- The customer knows who to ask for next time. It is helpful to be prepared to repeat contact details at the end of the call so the customer can check they have all the information they need. Sometimes customers are concentrating on the message they want to give us and do not register properly the name we give initially.
- Respect Data Protection regulations. This is a legal requirement. Any breach may have serious implications.

Before you put a customer on hold explain what you are going to do and use the secrecy button.

- Customers will accept being put on hold for a short period, providing they know why it is happening. Otherwise they may feel frustrated or that they are seen as unimportant.
- Using the secrecy button prevents the caller from hearing any other conversations in the background. This is important for data protection and to create a professional impression.

If you are unable to answer an enquiry quickly, offer to call the customer back when you have the required information. Agree with the caller when this will be.

- You may need time to locate a file or check information before giving it to the caller.
- It is far more professional to have the correct information and all the facts to hand before you reply to the caller. One vital fact could alter the whole message you need to give.
- Phoning back when agreed avoids the customer paying for a long call, and should be welcomed as the time will have been chosen as convenient.

Be prepared to arrange language support for a customer if required.

- Translations services; please contact Angie Harris or Anita Farrington, at Croydon Translation & Interpreting Services (CTIS) -Tel: 020 8407 1369 (x 60147) or CTIS@Croydon.gov.uk
- The Council provides services for a very diverse community and all our customers need access to our services.
- At present communication methods that may be more suited to clients who are deaf and hard of hearing include e-mail, and MS Teams if a BSL fluent staff member or translator is available.

Your personal safety and wellbeing should never be put at risk. Being clear on actions you should take will help you manage your work safely when difficult occasions arise.

Transferring calls

If you cannot provide the information that is requested, identify who can, inform the customer of their contact number (using Intranet phone list if necessary) before transferring the call. (How to transfer a call?) The customer wants to know who they are being transferred to and why. This will enable the caller to contact that person again easily should they need to.

Ensure that you pass on the caller's name, contact details and all key information if you have to transfer the caller to a specialist colleague. This will show the customer that you have listened to their enquiry and avoid the need for them to repeat information unnecessarily. Your colleague will be able to use the caller's name and start answering their query straight away. Should a call get lost in the transfer your colleague will have the necessary details to contact the customer.

Always ensure that the customer can speak to a member of staff who can help them, even if a call back has to be arranged at a time convenient to both parties.

Voicemail

If you have voicemail please access it using the 1234 code so others can check your voicemail if you are suddenly not at work due to sickness etcetera. Please use it to tell people when you are out of the office, or you are working with your phone not logged in (by agreement with your Manager), please manage people's expectations, for example, if you are likely to be out for most of the day, tell them you will not be picking up your calls for most or all of the day. Please offer an appropriate to your team) alternative contact point, for genuinely urgent/emergency enquiries.

If you leave the organisation likewise record an appropriate message & re-direction, your phone number may not be shut down for some time after you have left. Managers – please ensure staff who are leaving comply with this. Please also check their phones periodically if they have voicemail until the account is closed, some people will ignore the instruction not to leave a message.

Also if a staff member is absent unexpectedly, please record a message for them, & check their voicemail as above.

Out of Office

If you are going to be away from the office in a planned way, or you have agreed working off line, then please set you're out of office, please remember to set it both for internal and external emails. Please offer an (appropriate to your team) alternative contact point, for genuinely urgent/emergency enquiries. NB this out of office can also feed to internal colleagues MS Teams.

If you leave the organisation likewise write an appropriate message and activate your out of office, your email account may not be shut down for some time after you have left. Managers – please ensure staff who are leaving comply with this.

Also if a staff member is absent unexpectedly do remember you can gain access to their account in an emergency via IT support, you can then set an out of office for them, and monitor the account.