

Front Office Service

Level-I

Based on March 2022 Curriculum, Version 1



**Module Title: - Operating Private Automatic Branch Exchange
(PABX) Switchboard**

Module Code: CST FOS1 M07 0322

Nominal Duration: 80 Hours

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December, 2022

Addis Ababa, Ethiopia

Acknowledgment

Ministry of Labor and Skills wishes to extend thanks and appreciation to the many representatives of TVET instructors and respective industry experts who donated their time and expertise to the development of this Training Material.

Acronyms

PABX	Private Automated/Automatic Branch Exchange – is a telephone network system commonly used by call centers and other organizations. PABX allows a single access number to offer multiple lines to outside callers while providing a range of external lines to internal callers or staff.
PBX	Private Branch Exchange - a private telephone network used within an organization. Users of the PBX share a certain number of outside lines for making telephone calls external to the PBX
IVR	Interactive Voice Response- interaction with the company via pre-recorded responses to get the callers details and deal with the queries. Often referred to as an automated attendant.
PMS	Property Management System - computer system for a hotel and guest information
VoIP	Voice over IP or Voice over Internet Protocol

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Introduction to the Module

This module is developed to equip trainees with the skills and knowledge required to operate a private automatic branch exchange (PABX) switchboard and handle telephone calls in a range of settings within the hotel and travel industries workplace context.

This learning module is designed to meet the industry requirement under Front Office Service occupational standard, particularly for the unit of competency: Operate Private Automatic Branch Exchange.

This module covers the following units:

- PABX System and Features
- Operational Features of the PABX System
- Handling Telephone Calls

Learning Objective of the Module

- Define the PABX System and Features
- Demonstrate Operational Features of the PABX System
- Handle Telephone Calls

Module Instruction

For effective use of this module, trainees are expected to follow the following module instruction:

1. Read the information written in each unit
2. Accomplish the Self-Check Exercises at the end of each unit
3. Perform operation sheets provided at the end of each unit
4. Do the “LAP test” given at the end of unit three and
5. Read the identified reference book for further examples and exercises

Unit One: Private Automatic Branch Exchange (PABX) System and Features

This learning guide is developed to provide you the necessary information regarding the following content coverage and topics:

- PABX system
- Devices connected to the PABX system
- Functions of the system keys and lights
- Command structure of the PABX system

This guide will also assist you to attain the learning outcomes stated in the cover page. Specifically, upon completion of this learning guide, you will be able to:

- Identify PABX system
- Identify the devices connected to the PABX system
- Identify functions of the system keys and lights
- Identify the command structure of the PABX system

1.1 The PABX System

The telephone is the most important means of communication in business. Billions of business telephone calls are made each year. It's hard to imagine a business operating efficiently without a telephone. When the service is interrupted, even for just an hour or so, businesses complain loudly about their losses.

Without the telephone, organizations would be a mess. Business would grind to a halt. The slowness of written communications and the time and costs associated with face-to-face meetings would soon become intolerable. In fact, we've had reliable business telephone service for so long that it has become an integral part of the way we do business.

Today, the necessity of intelligent solutions in telecommunications has reached to a point that has never been before and is assured to continue being on the rise by the ever increasing telecommunication demands of the corporate world.

PABX is a telephone network that is commonly used by call centers and other organizations that allows for single access numbers to offer multiple lines to outside callers while providing a range of external lines to internal callers and staff.

A PABX system can facilitate shared phone lines and the businesses don't need to install separate lines for each desk; so much so that even 20-30 phone lines can facilitate up to 200 virtual phone lines. In addition, it allows employees to call each other by only dealing short extension numbers, and above all, the calls are free of cost and not to mention that in a traditional separate phone-line system, calls from each desk are charged like normal calls. So, in such cases, installing business phone network systems is a great option. Not only does it save you time and money in the office, but also prevents you from losing out on potential business, even when you are away.

PABX uses a range of different platforms such as Voice over Internet Protocol (VoIP), Integrated Services Digital Network (ISDN) and more for communication. In a PABX system or PABX phone system, Public Switched Telephone Network (PSTN) is used for facilitating connections provided by the service provider. The system works efficiently as not all employees are supposed to be on calls simultaneously and the system can seamlessly transfer calls between executives. A good example of this will be a call center where less physical phone lines are used than a traditional big retail store.

PABX systems have proven to be quite useful for small businesses as they work on a limited cash flow.

PABX systems in use

There are many varieties of models, sizes, available functions and facilities in use, one thing is for sure all hospitality establishments will have to use some form of PABX for communication purposes. The level of technology involved in the PABX system will vary from country to country and establishments. Large establishments may use a PABX system that has multiple lines, accessible from multiple telephones, and provides additional features that are controlled through a computer system while a small establishment may have a telephone and answering system. Business telephone Systems are often broadly classified into "key systems", "hybrid systems", and "private automated branch exchanges".



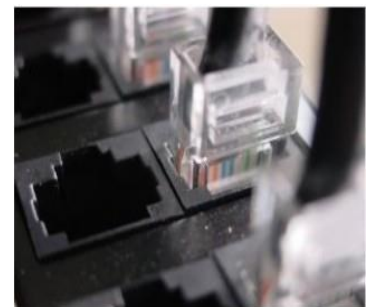
The operation of each system is potentially different and unique to each system requiring references to the manufacturer's instructions. Such as operator's manual, user manual and system administrator's manual in all instances.

Table 1: Some examples of PABX systems

Company	Link
LG Ericson IPECS	http://www.lgericssonus.com/
Panasonic Business Telephone Systems	http://www.panasonic.com/business/psna/products-home-business/business-phones/systems/index.aspx
CISCO	http://www.cisco.com/en/US/products/sw/voicesw/index.html
Asterisk	http://www.asterisk.org/
Elisha Telecom	http://philippines.elishatelecom.com/hosted.html
SAMSUNG Enterprise IP Solution	http://www.samsung.com/global/business/telecommunication/productType.do?ctgry_groug=13&ctgry_tyge=28
3MStructured voice and data cabling	http://www.3m.com/
FortiVoice	http://fortivoice.com/aboutUs/index.html
NEC	http://www.nec.com/en/global/solutions/univerge/index.html

1.1.1 Type, model and capacity of the PABX system

When you are looking for a new PABX phone system there are a number of factors that you will need to take in to consideration. One of the first things that you will need to consider is the PABX providers that are going to be offering you the service. It is very important to deal with a PABX provider that can not only offer you a range of solutions but also a complete solution in terms of the PABX, IP handsets and call termination all at cheap and competitive rates.



Addressing the needs for a PABX:

Large Establishment (100+ Employees)

- A large range of leading brand solutions to choose from at the right price
- Look at what system is popular in your marketplace

- Look for local, experienced, and qualified technician's ongoing maintenance and support is important
- Easy to follow training materials and extensive trainings for users to ensure greatest productivity

Functions to be considered

- Multiple sites
- VoIP solution
- Call center functionality
- Computer network integration
- Screen popping on computer telephony integration providing agents with customer details on their screen
- Easy customer self-administration software
- Organizing phone lines
- Toll free phone numbers
- Use of headsets
- Conference phones
- On hold messaging.
- Ability to record calls
- Ability to monitor calls.



Medium establishments (16 -99 staff)

Looking for a PABX system with anywhere from 16 - 100 staff is different from shopping for a small phone system. You've got different departments and each has their own requirements. In a fairly typical medium sized enterprise you might find you require:

- Mobility and remote access for sales
- Call center functionality for support/sales
- Simple visibility of all staff for reception
- Self-administration for management
- I.T wants computer integration to link your customer relations management (CRM) system.



Getting the right PABX is about tailoring a system to the needs of all departments. Most systems will enable you to customize all your needs. Make sure the training provided is suitable and adequate training material is available for future staff.

Small establishments (5-15 staff)

Small business customers need a phone system that meets the needs of real business. The system has to be reliable, with features you'll actually use - and it should be explained in simple terminology not complicated technical terms.

Benefits to a small business

- Sound more professional
- Improve the way you communicate
- Save money.

Features of the small PABX

A phone system, or PABX, will allow you to do so much more than just transfer calls, put customers on hold and speed dial suppliers. A suitable phone system will enable a small business to perform and communicate like a big one.

Functions to be considered

- Data and phone cabling
- New phone lines, fax lines, EFTPOS and security organizing diversions of existing numbers
- Creating toll free phone numbers
- Cost of calls



- Wireless phone systems transferring to mobile phones
- Voice mail
- Flexibility to work from home
- Ability to record calls
- Ability to monitor calls
- Easy to follow instruction manuals



1.2 Devices connected to the system

When you use a PABX system there will be a number of devices connected to the system to help with the day to day operations.

Today's PABX devices need to cater to your availability and presence, integrate with the tasks you are performing on your desktop and follow you when you leave the traditional office environment.

Devices of the system

Handsets:

Wall mounted handsets to be used by staff in back of house areas such as housekeeping stations on guest floors or behind the bar area away from the guests view



Desktop sets with hand set cords or head set cords. In most systems these cords can be connected to either the left or the right hand side of the phone making it adaptable for all office spaces.

Handsets can include loud speaker facilities and text-messaging via alpha numeric key pads.

Some handsets may even provide Hearing-aid compatibility

Handsets have function keys to store regularly used number and LED lighting to easily see the number or name of the person calling.

Voice quality over a digital phone is superior to non-digital handsets. Visit:

<https://panasonic.ca/english/accessories/handsets/index.asp>

<http://www.headphone.com/>

http://store.apple.com/ca/browse/home/shop_ipod/ipod_accessories/headphones

Handset Accessories:

Loud speaking function that allows the loudspeaker and handset to be simultaneously active, along with acoustic feedback protection

Programmable ringer loudness and tone

Hands-free speaking standard

Keys can be assigned to desired functions, such as

- Message waiting
- Call diversion
- Call back or voice-mail access
- Call transfer
- Call rejection with number storage
- Call waiting
- Call forwarding



Built-in Web server (for PC based management of the telephone via a Web browser)

Cordless Phones

Cordless handsets with features including headset, speaker, text-messaging, and remote-control are now available

Make sure the type of cordless phone you choose has a long talk time battery and stand by time

Always consider the weight of the phone and battery for your employees

Built in personal phone book will help with quick dial calls

Some phones will have a vibrator to assist with receiving calls in a noisy environment such as a nightclub

Calls conducted between staff members are not charged as outside calls and can be free or charged at a substantially reduced rate

Cordless accessories:

- Charges
- Batteries
- Headsets
- Blue tooth
- Protective covers
- Phone holders

Call alert systems - Silent call alerter Small click-on accessory which vibrates to warn user of a call. Handy to stay in touch without disturbing a meeting

Built-in Web server (for PC based management of the telephone via a Web browser **Computer Telephony Integration (CTI)** and screen pop are essential in providing customer information to agents, enabling them to deliver the ultimate customer service experience. When the call is presented to an agent, the internet attaches specific customer data obtained from the caller's Interactive Voice Response (IVR) interaction. IVR allows the customers to interact with a company's host system via a telephone keypad or by speech recognition, the system can respond with pre-recorded messages to obtain guest information and direct it to the appropriate agent.

Using CTI and screen pop creates a superior customer interaction where your customers are not asked to repeat information as they transit from automated systems to agents or when they are transferred from one agent to another.

Advantages of CTI and screen pop include:

- Improved customer service, allowing agents to focus on the customer's need instead of asking them to repeat basic or detailed information
- Improved call handle time by presenting data to the agent rather than requiring them to pull data from disparate systems
- Increased customer engagement by giving agents instant access to historical customer information for making product recommendations or following up on a previous interaction

Automatic Announcement Devices are designed to answer incoming telephone calls and play a High Quality Message Announcement to your callers. After playing a message, these devices can then hang up or re-direct the call.

These devices are ideal for applications such as:

- Providing telephone line information services
- Advising callers that their call may be recorded before their call is connected
- Advising callers of a new telephone number before their call is connected.
- Providing after hours announcements and information
- Call Forwarding, Find Me, Follow Me, and Call Filters
- Visual voicemail options including handset based voicemail, email based voicemail forwarding or web based listening and management
- Conferences and Conferencing Management



- Call Monitoring Options

E-Call - a plug-in that integrates your Cloud PBX with Microsoft® Outlook and Microsoft® Exchange Contacts. E-Call enables call placement from Outlook and provides intuitive incoming call notifications based on your Contacts.

On premise PBX systems may soon be gone; thanks to the rising popularity of cloud PBX. As the term implies, this type of phone system exists in the cloud, of the Internet that it is independent of physical connections and equipment, making telecommunications more efficient and also more affordable.

Room status update – can be made using the telephone system to "dial in" the status of each room.

Once the room attendant has completed servicing the room and an inspection successfully conducted the in room telephone system is used to relay the status of the room to the computer on Reception. This gives reception an up to date status on all cleaned rooms at any point in time.

Personalized guest answering systems – is a Voice Mail that can be set up for each guest who is staying in a room at a hotel. Many hotels today provide instructions for each guest to set up a personalized message on their in room phone. However, the demand for this has drastically reduced with the introduction and ease of international calls over a mobile or cell phone.

Automated wake up calls: the in room guest telephone system will usually have an automated wakeup call system incorporated within it. This enables guests to program in a wakeup call time and the phone will ring at the required time chosen. The guest is usually greeted with a pre-recorded message letting them know it is their wakeup call time and the weather for the day.

1.3 Identifying the functions of the system keys and lights

Whatever system you are using it is essential to understand the functions of the system keys and lights. Training will be imperative when you are using a PABX telephone system in order to get the maximum benefit out of all the functions and features that are available. Today many of the training manuals for various manufacturers are online with self-paced tutorial available.

System keys

The products that are available on the market today might have variations for the terminology described in this section however; you will find that the functions and names are similar.



Speaker/Loud speaker

This key usually relates to the ability to put the call on to speaker so it can be heard without the use of the hand or headset. You can use the speaker button to dial calls and use as a hands free phone.

Headset

You can use a headset instead of the handset allowing your hands to be free for writing and doing other tasks.

Mute

The mute button allows you to talk and your voice will not be heard by the caller; a very handy function to be used if discussing the caller's request with a supervisor.

Volume

Key allowing you to control the volume of the call can be increased or decreased.

Directory

A key that allows you to check call logs such as missed calls received calls and placed (outgoing) calls. There might also be a link to the company directory to search for phone numbers and extension numbers.

Ringtone

Key available to change or alter the ring tone of calls; some phones enable you to have different ringtones for specific callers or establishments.

Lights

Usually lights will light up when a function is in use for example, if you push the "Speaker" button it will light up. A light might appear when a call is coming into the system, or the line is busy, or you have a call waiting or messages waiting.

Screen display

The screen or touch screen will display the function you are using for example, "Directory" and list the options you can select. The screen can also display the name and room number of the hotel guest or the extension that is calling.

This screen area is used to display all the instructions and messages you will need.

Navigation

The pad that allows you to navigate up and down, right and left

Settings

To adjust the settings you require such as brightness, color, sound and so on.

Programmable buttons

A feature that allows you to store your own information such as fast dial numbers

Messages

Storage area for any voice mail messages that have occurred when you have missed a call or were unavailable.

Help button

Comprehensive on line help system for your phone.

Key pad

Enables you to dial numbers, enter letters and choose menu items.

Redial

By hitting a button you can re dial the most recently called telephone number

Resume

Allows you to resume your call after placing it on hold

1.4 Command structure of the PABX system

Command structure will vary between models and systems manufacturers. They will nearly always have a similar function however; each manufacturer may give this function a different name.

It is a system whereby authority passes down from the top IT Manager to the frontline user where passwords are the pathway to the command structure. Each member along the line uses part of the system and this all feeds back to administrative data to the management.

Table 2: Command Structure Terminologies

Command	Definition
Abbreviated dialing	Speed dialing a phone number by entering an assigned index code (1-99) on your phone key pad.
Administration data	This is the data that is recorded behind the scenes for administrative purposes. For example, the record of call times and dates, the number called, cost of calls, calls made per extension number, length of call and so on.
Auto answer	Incoming calls can be answered automatically to your phone after one or two rings without pressing a button or picking up a handset.
Auto dial	Once you start to dial a number that you have dialed before the system recognizes the first few digits and displays a list of likely numbers for you to choose from.
Authority levels	The structure of the system allows for different authority levels, from the basic user, supervisor up to IT administrator. The different levels are linked to the amount of access a user is permitted.
Call back	Provides an audio and visual alert when your phone is busy or an unavailable party becomes available.
Call logs	Enables you to view records of all the missed, received and placed calls.
Call metering	Mode of billing. It shows statistics of your calls/SMS/text/data traffic and lets you set limits for each of these plans. Call Meter supports a huge amount of billing modes which can be adapted by the operators billing system.
Call overview	Allows changing the display of your touch screen to show one call per line. Call overview can be useful if your phone has multiple lines available.
Call Park	Allows you to put the call on hold and retrieve it from another telephone on your system. Call park can be useful if you want to transfer a call to another office or other location
Call pickup	Enables you to pick up a call that is ringing on another

	person's phone. It is handy in a reservations office where there are a lot of different people working.
Caller Id	Provides you with the details of the person who is calling. Such as a guest in one of the rooms.
Call waiting	Offers you the ability to answer an incoming call while you are on another call.
Call matter code (CMD)	Allows you to enter a billing or tracking code when you are making a call. Ideal for international guests placing a call overseas that will be charged to their room.
Conference features	Allows you to talk simultaneously with a group of callers. This function could be displayed as "Meet-Me" or "Join". You initiate the conference by calling all the members you will require. Then connect the callers who are all on single lines together to enable the conference call.
Corporate directory	Allows you to use your phone to find coworkers phone or extension numbers.
Direct transfer	Allows you to connect two callers you are on the line - without you having to stay on the line.
Extensions	<p>Listing of phone numbers for all staff members or departments. Extension number is the phone number allocated. Usually consist of 3 or 4 digits.</p> <p>Large businesses use telephone extensions because it is not feasible for everyone in the company to have his or her own phone number. Extensions are internal lines through the company's switchboard exchange system. Using these extensions, inside callers have direct access to any department or staff member by dialing a simple number code. Outside callers who know the employee's extension number can also connect directly to their party.</p>
Forced authorization code	Prohibits certain numbers such as mobiles or international phone numbers from being dialed without an authorization code.
Immediate divert	Allows an incoming call to go directly to voice messaging system. This is ideal if you are busy with a

	guest and can't answer the call.
Information mailbox	This allows you to tell your callers or customers about your current products and offers, taking advantage of any time the caller is on hold and providing a marketing opportunity to the establishment.. With information mailbox you can record announcements and provide options for scrolling forward and backward within the announcement or temporarily pausing playback.
Language or Local setting	Enables you to change the language that is programmed into the phone.
Multiple lines per phone	The system administrator assigns one or more phone line to your phone. Enabling you to handle calls on multiple lines.
Message group parameters	A system of messaging within group parameters. Primarily useful in mail groups that represent closed mailing lists- mailing lists where it's expected that everybody that writes to the mailing list is subscribed to it. Since using this parameter ensures that the mail only goes to the mailing list itself, it means that members won't receive two copies of your follow-ups
Maintenance agreement	Not having a maintenance agreement can prove to be costly. It is best to have a maintenance agreement with the purchasing company that provided your PABX system to have professional ICT technicians to diagnose and repair problems with the minimum amount of downtime and not be charged a fortune in service charges. Maintenance agreements will vary according to what you pay for.
Mailbox statistics and reports	Detailed reports are available on administration and user-specific statistics. Current recording time used (a% of the total) Memory capacity allocation for greetings and messages. Mailbox statistics can be printed containing a number of entries sorted according to the following criteria: Total recording time for messages

	<p>Number of messages</p> <p>Date of the oldest message.</p>
Paging	Some phone systems allow you to use a paging system for restaurant, bars and the lobby to ask the required person to come to a particular area.
Pager receiver	Paging Receiver is a multi-function pager receiver capable of receiving paged messages and processing them in a number of ways. Standard outputs include printing to a parallel printer and two serial ports with a variety of output protocols pager uses vibrations and different colored LED's to notify the wearer it has been activated. These pagers can operate up to a distance of 300 meters. They suit a wide range of applications from retail and hospitality to aged and disability care.
Personal address book sync	Allows synchronizing data that is stored in Microsoft Windows or Microsoft outlook or Microsoft Outlook Express address books with your telephone system.
Phone line text label	Enables you to create a text label that shows up on your touch screen for each of the extensions you have on your line. This allows you to personalize the information.
Privacy	Prevents other coworkers who share your phone line from viewing information on their screen about your call details.
Quality reporting tool	Enable you to submit call quality information to your system administrator at his or her request.
Remove conference participants	Allows you to disconnect conference call members who are no longer needed in the conference call without affecting the other participants.
Recorded voice announcement	Ability to convert text messages to a voice or speech recording. Therefore, there is no need to pay for others to record messages for you.
Supervisor call monitoring	The system has the capability to allow the supervisor to listen to any calls in progress for purposes of quality assurance and training.

Trunk/trunking or Trunk link	<p>A name for the operator assisted call that is made international or nationally through the telephone system.</p> <p>In the world of telephone communications, trunking is a method for a system to provide network access to many clients by sharing a set of lines or frequencies instead of providing them individually. This is analogous to the structure of a tree (hence the name) with one trunk and many branches.</p>
Dedicated trunk	A telephone line used for one purpose only; for example, calls to the emergency services.
User option web pages	Allowing you to control the phone features and setting and establish a customized phone system. Your system supervisor would provide you with a URL and password login information.
Video support	Some telephone systems will support video calls if compatible equipment such as video phone, camera and video software are available.
Web dialer	Allows you to make a call on your phone using the Web Corporate directory webpage on your computer.

Self-Check 1

Written Questions

It is a requirement of this unit to attempt the following exercises as advised by your trainer.

Part I: Write short answers

1. Describe the make, models and features of PABX system that are available in any star-rated hotel property in your area
2. List 3 advantages of using Headsets and Cordless type of phones.
3. Discuss the function and benefits of:
 - a) Auto dialing
 - b) Call metering
 - c) Corporate directories
 - d) Conference features
 - e) Multiple lines per phone

Type II: True/False Items

1. Today, organizations can fully operate without telephone
2. PABX is used only in large companies' call centers.
3. Automatic Announcement Devices are designed to answer incoming telephone calls and play a High Quality Message Announcement to your callers.
4. Room status can be updated using the PABX telephone system.
5. A key that allows you to check call logs such as missed calls, received calls and placed (outgoing) calls is called directory

Part III: Match the following command structures with their respective functions

#	Column A		Column B
1	Call Metering	A	Records of all the missed, received and placed calls
2	Call Park	B	Statistics of your calls or SMS for billing
3	Call Logs	C	Putting a call on hold and retrieve it from another telephone on your system
4	Dedicated Trunk	D	A telephone line used for one purpose only; for example, calls to the emergency services.
5	Direct Transfer	E	Allows you to connect two callers you are on the line - without you having to stay on the line.

Unit Two: Operational Features of the PABX

This learning guide is developed to provide you the necessary information regarding the following content coverage and topics:

- Text writing
- Password Creation
- Directory numbers and category lists
- Programmable keys and numbers
- Recording telephone conversations
- Call forwarding functions
- Saving commonly called numbers
- Call metering functions
- Internal message functions
- Mailbox system functions
- Date and time setting
- Special system features

This guide will also assist you to attain the learning outcomes stated in the cover page. Specifically, upon completion of this learning guide, you will be able to:

- Write text using PABX
- Create a password
- Handle directory numbers
- Handle category lists
- Allocate programmable keys and numbers
- Allocate functions to programmable keys
- Record telephone conversation
- Program call forwarding functions
- Save commonly called numbers
- Demonstrate call metering functions
- Demonstrate internal message functions
- Demonstrate mailbox system functions
- Set date and time
- Demonstrate use of special systems

2.1 Text Writing

Text writing is a function of literally any telephone PABX system that is available. When typing text, make sure you follow the manufacturer's instructions or make full use of the "help" keys.

Most PABX systems will have a language option or local setting for you to use the local language and characters.



Often the text you might be using is simply confirming system value including entering 'Yes /No' response to system options. Sometimes these options might be numeric.

Screen displays or touch screens will pick up the information from the Corporate Directories set up in the PABX telephone system. The screen displays can also display the name and room details of your hotel guests. This information will be picked up from the PMS (Property Management System) computerized system used to input the guest reservation and arrival details.

2.2 Password Creation

A password is a secret word or string of characters that is used to authenticate the user and prove identity there by securing resources and information.

Everyone should keep their password a secret from other staff and those who are not permitted the same access level.



When creating a password, always follow the manufacturer's instructions or make full use of the "help" keys.

Usually the first thing you have to do is develop a password in order to move from the original system default settings.

Most establishments will require you to change your password regularly. Some places will have systems to notify you when your password is about to expire and you will have so any days left to create a new password. This is good security practice as staff can easily learn each other's passwords.

2.3 Directory numbers and category lists

2.3.1 Directory Numbers

Most companies will have a listing of corporate directory numbers. This may also include all emergency service numbers and numbers that are frequently called. These directory numbers need to be maintained and updated. An experienced staff will need to be assigned to this task and be fully responsible for handling directory numbers.

Always follow the manufacturer's instructions to handle directory numbers. The directory will be used to assign numbers to extensions and external lines. Staff and guest names will need to be assigned to the directory numbers.

All directory details must be permanently stored in your PABX system.

Details of all directory codes and country codes needed to make a trunk call must be readily available. In some cases regularly dialed area codes could be permanently assigned to trunk lines for fast and easy accessibility.



Staff need to be trained to read the directory numbers correctly, some numbers might include the country code or others have a full number when on only the last 4 digits are used for internal calls, while others might need the '0' deleted when making a overseas call.

Develop a system to list directory numbers such as first names first or family names first. Rearrange the positioning of the extension numbers to be most practical for the work use and establish a system to maintain this data and always keep it up to date and accurate.

2.3.2 Category lists

When directory numbers are created it might be necessary to develop categories rather than simply have alphabetical listings. Categories are groups that are similar. For example, make a list of bars, then identify the names of the bars, or housekeeping staff then list the names of the housekeeping staff. This provides additional options when searching for numbers and it can also make the process of finding a directory number faster.



2.4 Programmable keys and numbers allocation

When you have a new PABX system you will be required to program in all the existing numbers and extensions you have. In some cases the establishment may have to change the current extension numbers being used if they don't fit with the new system. For instance, you may have 3 digit extension numbers and the new

system is programmed for 4 digit extensions. Staff will be trained to use the programmable keys to store this information.

One has to be familiar with the manufacturer's instructions and follow the details in the manual relating to programmable keys and numbers allocation.



The telephone system will usually allow you to program up to 10 frequently dialed telephone numbers on your dial-pad key 0 thru 9 to act as a speed dial.

2.5 Recording telephone conversation

There are plenty of reasons why recording a telephone call might be useful, ranging from having an exact record of what was said through to making notes for projects afterwards or for quality or training purposes. Most phone systems regardless of the make or model will have a record button to enable you to record a telephone conversation.

Initiating the recording function maybe as simple as pushing the "record" button or more complicated in that you need to apply an adapter.

If a call is to be recorded or monitored, an organization must tell the caller at the beginning of the conversation so that the caller will have the chance either to end the call, or to ask to be transferred to another line where monitoring or recording does not take place if this is available.

If you have recorded a call you must know how to play it back or listen to it after the call. When the purpose to which you needed to record the conversation is finished then make sure you erase the recorded call. There is no need to keep out dated telephone recordings on your telephone system forever; in fact most systems will have a limited capacity for recording calls, so keep this space available for when the need arises.

2.6 Call forwarding functions

Call forwarding is when the telephone system has a feature that allows incoming calls to be redirected to a third party. For example, this third party may be a mobile phone or a voicemail box or even other telephone number.

Active call diversion is when someone is trying to call you and you are already on the phone. The new caller will automatically be forwarded to your voicemail box to leave a message. However, some phone systems have a call waiting option which enables the telephonist to put the first call on hold, answer the second call, then go back to the first call again.

There are times when clients or customers will ring your direct line and you are unavailable (busy) or they receive no reply. The options the callers have is to leave a message on voicemail or some telephone systems will actually forward the call to an operator who asks

the caller if someone else can help them or re-directs the call to another phone number such as your mobile.

Programming the call forward address usually means typing in the numbers you want the call to be diverted to either permanently, when busy or when out of the office after a certain number of rings.

Enabling by-pass to call forwarding is to have the call diverted to your voicemail box to the caller to leave a message.

2.7 Commonlycalled numbers storage

In a hotel environment there are many numbers that may be called frequently such as, airlines, popular tourist attractions, coach bookings and so on. It is advisable to have these commonly called numbers saved for fast and easy access.

There should be a discussion or workshop to decide what the commonly called numbers in your area are. It is important to capture numbers that relate to all situations not just one persons' opinion.

It may be necessary to categorize these commonly called numbers for example, Category: Emergency Service - for police, fire brigade, ambulance, doctor and dentist.

Make sure you allocate logical storage locations on your telephone system for these numbers. Staff training or communication is essential to ensure that all staff are familiar with this storage function. Entering and confirming correct access and storage must be kept up to date and maintained.

2.8 Call metering functions

Call metering is the process for determining call charges for a telephone call made through your telephone system for local, national and international calls.

The start of the conversation will initialize the metering counter upon forming the speech path; detecting metering pulses from a telephone network, and storing the counted number of metering pulses; upon completion of the telephone call, these pulses are determined and output as the amount to charge for the call.



The PABX system will be able to accurately cost the call and record and report the charge details. The PABX system will meter the calls based on time and pulses. All the costs will be recorded against the number called, time of day and date.

Other costs may be counted such as operator directed calls to other countries, directory assistance, reverse charges, person to person and so on.

Cost counters will produce printed records, provide account totals for various extensions, and produce charges for in house guests' phone calls. Likewise, these cost counters need to be re-set after end of day processes or when a guest departs from a room.

Cost counters can be available at the location of the calling telephone, a guest's room for example. A keyboard is provided through which the number to be called is entered; this number appears on a display and can be checked for accuracy before the number is actually "dialed" by depressing another key on the keyboard. At this time the initial billing rate and initial billing time period appear on digital displays, as well as the billing rate for the next billing time period and the corresponding period duration. This provides an accurate indication of the cost of the call.

Call metering can be programmed to a countries currency or set in whatever currency they choose to use.

2.9 Internal message functions

Internal message function can be a light system or text system of identifying messages sent and received. Internal message systems are set up by staff so there must be some parameters set to ensure these messages are professional and accurate.

Call back messages can be initiated after the caller plays back their message. There is no need to dial the number; a direct connection is set up for the call back. A call back can be initiated to both internal and external callers.

Your paging system could also be used to send internal messages to staff, managers, and security.

Call me messages are automatic messages sent asking a particular number to be called.

There is no interaction with the caller, just an automatic response sent. This will need to be programmed into your system if you want to use this particular function.

The establishment will have to set up policies and procedures for: sending messages to others, sending voice messages, sending text messages, sending 'call me' messages.

2.10 Mailbox system functions

Mail box systems have been established to try and catch the calls you previously missed. The mailbox accepts calls on your behalf. You can set up a personal mailbox message to explain why you are unavailable, or an alternative phone number to call, or the option to leave a message. People are very comfortable at leaving messages these days as nearly all personal telephones have this option. Mailbox functions will vary from manufacturer to manufacturer but basically the systems all do the same thing.

To leave voice message for callers, open with a greeting and welcoming the caller, identify who has been called, explain why you are unavailable, offer an alternative contact number or ask them to leave a short message.

Example: "Hello, you have called Human Resource Department, Hotel ABC, I am not at my office right now, but if you would like to leave a message after the tone, I will contact you as soon as possible or you can call my mobile 0910 888 800."

Some systems allow you to leave several different messages on the basis of morning/afternoon/evening calls.

When the telephone attendant is handling other calls, you can also use the Auto Attendant Mailbox as an automatic attendant. The basic function of the automatic attendant is called "announcement before answering". Announcement before answering begins with a company greeting. For example: "Welcome to Hotel ABC. Our attendants are busy right now. Please hold the line."

2.11 Date and time setting

It is important to make sure the date and time have been set according to cities standard time zone. Date and time will be used for so many records that it is essential to ensure the date and time are accurate, to adjust the daylight savings time, and to record history of outgoing call time, area and duration for posting in to the guest account.

Date is entered with the day, month and year or alternatively, month, day, year forma. Some establishments will also require the configuration of the day of the week as well as the date such as Wednesday 16th June Time of the day may also incorporate the hour, minute and seconds 12 hour or 24 hour clock system format.

2.12 Special system features

Whatever brand of PABX system you have each brand and model will have its own special system features. As a general rule the basic system features will be available in all PABX systems. However, the more you pay the greater the number of special system features you will receive which will make communicating with your customers more professional and far more efficient. For example:

Call back

Calls to busy or unanswered extensions are automatically re-established across the network when the extension becomes free or is not used. This saves time for the staff member as you don't have to remember to dial the person again - the telephone system "remembers" you wanted to call this number and as soon as it is free - it rings the number for you. When a call back rings - it is a different ring to a normal call, it usually rings at a faster ring, this is to remind you of your call back. A Call Back can be initiated to bother internal or external callers.

Break-in to call

Having a facility to break in to a call may be necessary for international calls restricted to a particular price or time limit - the caller is reminded that there is only one minute of this call left so they can prepare to say goodbye.

Person to person calls also require the break-in facility as the telephone operator needs to break into the conversation to ascertain that the person at the other end of the line is the person who is being called, once this is established the call will be connected.

Reverse charge calls are another area that the break-in facility would be used. Reverse charges is when the call is to be paid by the person receiving the call and not the caller. The telephone operator needs to get the details of the person paying for the call, break

into the call to check that the receiver of the call is prepared to pay for the call then allow the call to go through to the required parties.

Camp-on Call

A telecommunication system that answers incoming calls and instead of going to voicemail or being put on hold the caller is placed in a queue and as soon as the required line clears the call is put through; this system feature permits holding an incoming telephone call until the called party is free.

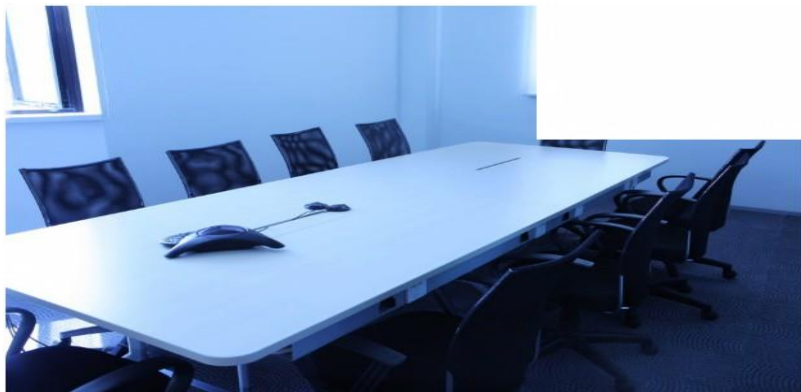
Reminder

With reminder service, you can arrange for the system to make reminder calls at pre-set times. Reminder call acts like an alarm on your phone - your phone will ring when you program it to. Maybe you need a reminder each day or a one off reminder to attend a special meeting. You can push a button to activate this service put in the date and time of day you need to be reminded.

In some systems you can specify the amount of rings you need to the reminder call.

Conference call

Teleconferencing can be done through an audio conference call using only the telephone or through the web if you need to share files or visual aids. Since most companies have resources for outbound conference calls via the phone, this feature is very necessary.



It has an option to schedule the audio conference call for a time that is convenient for all parties. When you are teleconferencing with people in different geographic areas, it is important to remember that they may be in different time zones and schedule your call for a time that falls near normal working hours for all parties.

Self-Check 2

Written Questions

It is a requirement of this unit to attempt the following exercises as advised by your trainer.

Part I: Write brief answers

- 1) Discuss the benefits of category lists and why they would be used.
- 2) Discuss the function of call metering.

Part II: True/ False Items

1. Most phone systems regardless of the make or model will have a record button to enable you to record a telephone conversation.
2. Mailbox system accepts calls you previously missed on your behalf.
3. Setting date and time is used to record out-going calls time, area and duration for posting accuracy.
4. Camp-on call feature of PABX system permits holding an incoming telephone call until the called party is free.
5. Break in to call feature of the PABX system allows the caller to be reminded of the time and money left before the call limit set.

Part III: Describe the following special system features and when to use them

- 1) Call back
- 2) Break in to call
- 3) Camp on call
- 4) Reminder
- 5) Conference call

Unit Three: Handle Telephone Calls

This learning guide is developed to provide you the necessary information regarding the following content coverage and topics:

- Placing out-going calls
- Receiving in-coming calls
- Demonstrating appropriate telephone communication skills

This guide will also assist you to attain the learning outcomes stated in the cover page. Specifically, upon completion of this learning guide, you will be able to:

- Place out-going calls
- Receive in-coming calls
- Demonstrate appropriate telephone communication skills

3.1 Placing out-going calls

Calls are made for a variety of reasons. Whatever the reason when placing an outgoing call we must follow the correct telephone etiquette using our telephone skills and follow the manufacturer's instructions on how to use the telephone equipment effectively.

When making outgoing calls on behalf of an enterprise or third party, unless the client or guest knows the numbers they need you will have to consult a directory.

Directories can be:

Internal - a listing of all the department extensions and numbers

Client directories - a listing of all the clients an enterprise has

External directories - either electronic or hard copy - using external listings to find the number required by the enterprise: local directories, regional directories and international directories.

In some countries you can use Directory assistance - where an external operator will assist you to get the details needed for the call. When placing outgoing calls you will need to determine the purpose of the call.

Establishing contact over the PABX

Once you have been connected to the number you requested or dialed the person at the other end you should start the conversation with giving an appropriate greeting and name of your establishment.

Once you have established that you have the correct business, ask to be put through to the required person you are seeking. Make sure you are familiar with the telephone system as you will have to open and close the various lines at different times of the conversation.

For example: Placing an external call for Mr. Girma (a guest at your hotel) to the BCD Trading

Before you dial the outside line - you will need to make sure you have your guest (Mr.

Girma) waiting on the telephone line ready for his external call. Alternatively, he is at a phone ready and waiting for the call to be put through to him.

You will close off Mr. Girma's line so he cannot hear your conversation with the BCD Trading.

Dial the enterprise or third party, BCD Trading.

Call is answered: "Good morning, BCD Trading, Sonya speaking, how may I help you?"

You reply: "It is Hahu Hotel calling on behalf of Mr. Girma; we want to speak to Mr. Yonas, in the marketing department please."

BCD Trading "Yes, I will put you through"

You to Mr. Yonas- when he answers the call:

"Good morning, Mr. Yonas, I have Mr. Girma on the line for you, one moment and I will put him through"

Using your telephone equipment open the line to Mr. Girma or call the extension number he is waiting near for the call.

Make sure you close the connection between yourself and Mr. Yonas on the BCD Trading. This will allow you to talk to Mr. Girma without the BCD Trading or Mr. Yonas listening onto your conversation.

You to Mr. Yonas:

"Excuse me, Mr. Yonas, I have Mr. Girma on the line for you, one moment and I will put him through"

Open the connection to Mr. Girma.

You to Mr. Girma:

"Mr. Girma, Mr. Yonas is on the line, I will connect you now."

This way you have established contact and made it perfectly clear who is calling whom and put the call through as requested.

Transferring calls

Make sure you know the process to put the call on hold and that you can use the transfer operational process to contact another extension without cutting off the original caller.

When transferring calls it is important to transfer information to the new department as well and not let the "customer or guest" have to keep repeating themselves.

Placing an internal call on behalf of a third party

The difference of dialing an internal call on behalf of a third party compared to an external call is that the process is much simpler as you can use your speed dial numbers for the required extension number. You may also have more options available to you to use such as diverting to another number, using call back, or call forwarding, even voicemail.

Once you have received a call, you will put the caller on hold, dial the extension number of the third party, like before you must let them know who is calling and that you will be putting the call through, use the system to connect the third party to the internal extension.

Remember, if the call is unanswered you will need to return to the original caller and let him/her know there is no one answering on this extension and give him/her the option

of leaving a message, (follow the process of putting through to a voice mailbox) trying again later (you could place a call back for yourself that number), having the call put through to another person, or diverting a mobile phone number.

Place a call using stored numbers & alpha-numeric keys

When placing a call using stored number you simply press the required digit for the stored phone number and the call is automatically made to that phone number. You would save time as you only used one keystroke instead of dialing the complete phone number on the keypad.

To activate stored numbers you will need to use the alpha-numeric keys to initiate the preprogrammed stored numbers.

3.2 Receiving in-coming calls

Effective telephone communication involves skills that combine good verbal skills with unobtrusive telephone techniques. Poor telephone skills will very quickly put someone off if they are trying to do business with you. Conversely, an excellent telephone technique will not compensate for poor verbal communication skills. The key to success is in finding a balance between the two.

Because the telephone systems used today can do so much it is essential that all new staff are trained in the use of the system. The best way is to have a supervisor acting as mentor for the new staff.

Answering an external call

Use your voice effectively. Some of us have more authoritative voices while others have quiet soft voices. Try and project a middle of the range voice.

The rate at which you speak can affect your voice- try not to be too slow or too fast

Speak directly into the mouth piece. Adjust the headset to make sure it is suitable

If your pitch is too monotone or too high it can be undesirable

Keep your voice at a reasonable volume- louder doesn't mean clearer

Your tone should vary along with inflections - but try and keep it sounding normal

Sit up straight and be comfortable in your working environment

Your voice should reflect a professional image

You should have a smile in your voice

Listen to what the guest/customer is saying

Ask suitable questions to obtain the information you require

Use an appropriate greeting, for example:

Staff: "Good afternoon, Thank you for calling Entoto Lodge, this is front desk, Meron speaking. How may I help you?"

Caller: "Yes, Meron, My name is Daniel, and I need some information about your function facilities?"

Staff: "Daniel, I will transfer you to Kamal, he is the functions manager who will be able to help you."

Caller: "Thanks Meron, that sounds fine".

Answering an internal call

You must still remain professional even if the call is coming from an internal line. This could mean the call is either from house guests or from other staff members.

Usually, the internal number will be displayed on the digital display so you will know which department or which guest room it is. Some systems will even display the guest name on the screen. Therefore, it is a good idea to use the guest name whenever you can.

Placing calls on hold

As mentioned before let the caller know why you are putting them on hold and what you are doing.

Don't forget to return to any calls on hold sometimes, you can get busy and forget you have a call on hold.

Use the telephone system to 'store' the call on hold correctly.



Transferring calls

The skill of transferring an incoming call requires a complete understanding of the workings of the telephone equipment you are using, otherwise you are likely to cut the caller off and lose them altogether.

When transferring calls it is important to transfer information to the new department as well and not let the "customer or guest" have to keep repeating themselves.

For example: Jenny has called your number (the hotel restaurant) enquiring about a red jacket that was left behind last night. You are unable to help as it is hotel policy that any belongings left behind in any hotel facility must be transferred to the lost and found section.

Transfer procedure and conversation

After Jenny has explained to you that she is looking for her jacket, and you have informed her that she needs to be put through to the lost and found section, let Jenny know you can transfer the call straight away.

Step 1: Always tell the customer or guest what you are doing.

"Jenny, I will just transfer you to the lost and found section as they will be able to let you know if they have your red Jacket."

Using the telephone system put Jenny on hold.

Dial the extension for lost and found section - when answered. Always make sure that you know the extension you are calling is the correct one to help the client.

Step 2: Explain what the customer or guest wants - don't let them have to explain it again.

"Good afternoon, Almaz, it's Linda from the restaurant, I have a Jenny on the line she is looking for a red Jacket she left behind last night in the restaurant."

Almaz: "Thanks Linda I will talk to Jenny".

Step 3: Put Jenny through to Almaz in lost and found section

Henry will talk to Jenny about the red jacket - and Jenny is pleased that she doesn't have to tell her story all over again. Not only did you successfully transfer the call but you have offered a service to Jenny and made the establishment look extremely professional.

Of course, you would have had to use your telephone system more extensively if lost and found section attendant was busy when you called. You could have asked Jenny did she want to leave a message (transfer to mailbox) did she want to wait (while you activated Call-back) and you could try Lost and found section again, alternatively you could try another extension number (if call pickup is actioned). If you know your telephone system's functions you can get it to work for you and your company most effectively.

3.3 Demonstrating appropriate telephone communication skills

Phone skills are the communication tools you use when making calls to customers, clients and team members. When you're unable to meet with business professionals in person, calling them on the phone is an effective way to stay in contact and communicate in real time. As you speak on the phone, you should be engaging and personable in order to build and maintain a strong connection with them.

Using your phone skills to maintain a positive relationship with your clients is a great way to demonstrate strong customer service abilities. Showing your professionalism, empathy and positivity over the phone also impresses clients and assures them that you care about their

needs. Here are some essential phone skills you can apply when communicating with customers:

1. Positive attitude

As you speak with clients over the phone, remain positive throughout the entire interaction and work to solve any challenging problems they may present to you. A positive tone can give a help to reassure the caller and may calm them down if they're expressing confusion or frustration with your product or service.

2. Clarity and strong diction

Try to remain clear and enunciate your words effectively while you speak on the phone. Use every day phrases and words as you talk with them to make it easy for both of you to follow the conversation. To ensure you have strong clarity, take a few pauses when you're speaking to give yourself time to think about what you'll say next. This ensures you're making complete sense while you speak and are avoiding any filler words. Talk at a slow and steady pace so the other person can easily understand what you're saying.

3. Interpersonal skills

Friendliness and interpersonal skills are crucial when talking with customers. Remain friendly and kinds as you answer questions and take messages. This keeps the conversation personable and can make the customer feel more connected to you. Smile as you talk on the phone. When you display friendliness as you talk, it reflects in your voice during the call.

When you first answer the phone, say your own name and the name of the business. For example, you can say, "Marketing Solutions, this is Paige. How can I help you?" This shows your eagerness to assist them and starts the conversation on a friendly note. Before you get too far into the conversation, ask their name and repeat it back to them naturally as you continue speaking. This builds a stronger connection and shows you care about them and their situation.

4. Empathy and sincerity

From the moment you answer the phone, maintain a genuine and sincere tone as you speak with the client. Keep your greetings and responses natural rather than scripted or generic. Connect with them by attempting to understand their perspective throughout the phone call. Stay patient with them as you listen and answer questions. If they ask you challenging questions, do everything you can to provide them with a satisfactory answer.

If there is someone else in your office who you know can better assist the customer, you can transfer them. Remain sincere as you transfer their call and politely ask the customer if you can put them on hold while you locate a helpful resource for them.

5. Active listening

To show the customer or client you care, use listening skills to let customers know that you're there to assist them. As they talk with you, show them you're actively listening by repeating information back to them or providing audible feedback by saying words like "okay" or "yes".

6. Professionalism

Speaking with clients on the phone means finding new ways to demonstrate your professionalism. Wear business-professional attire and use proper posture by sitting up straight and making sure your phone doesn't release any static or other unwanted noises during the call.

Keeping yourself looking professional helps you feel that way, which applies to phone conversations as well. This is why the way you dress and present yourself is important, even if you're working from a remote or home office. Before your call, test the audio on your phone or headset to ensure your clients hear you clearly.

7. Organization

Even over the phone, clients may still expect strong organizational skills from you. If you're holding a meeting with your client over the phone, make sure you still have all the items or documents you need before calling them.

Have a pen and paper with you to take notes during the meeting, and keep your new workspace neat and organized. This shows your clients that you remain professional at all times.

8. Politeness

If you talk on the phone with many people during the week, make sure you stay polite from the beginning to the end of each day. If your job involves regularly calling clients or answering customer calls, your whole day may consist of solving client issues on the phone.

9. Gratitude and appreciation

Showing appreciation for your customers and thanking them regularly is an effective way to continue building lasting relationships over the phone. After the call, politely thank them for speaking with you. If you're reaching out to customers and they're taking time out of their schedule to talk to you, show your appreciation for allowing you to speak with them.

When you have to reschedule a meeting or hold it over the phone, thank the client for being flexible with their schedule and letting you conduct business in a different format.

10. Research and preparation skills

If you're making a call to customers, make sure you do your research by looking up their names and fully understanding why you're calling them. Have your reason for calling the customer prepared ahead of time to show that you respect their time. If you have questions to ask the client or customer at your upcoming meeting, conduct your research beforehand and write down all the questions you have. Have your meeting information and details ready before you speak with them to get the most out of both their time and yours.

11. Leadership

Leadership abilities are crucial when talking on the phone. Your clients may experience distractions from their day, which could cause the phone call to go off-subject. Keep the conversation flowing, positive and on topic with your agenda items. Make sure your voice remains at a steady, authoritative tone as you work with customers and clients.

12. Task and time management

If you regularly make calls to clients and customers, it requires extra care to maintain your other work responsibilities. Use time management skills to organize your time wisely and consistently reach out to customers while balancing your other work.

13. Engagement and interactive skills

As you speak with clients, try to stay engaged in the conversation and provide regular responses. This is an effective method of using your customer service skills to keep clients interacting with you. Help them feel more comfortable by asking engaging questions about how you can assist them and how you can be of service. This allows you to build a stronger and more trusting relationship with clients.

14. Technical skills

Many of your meetings with customers or clients may take place over the phone or through video conferences. This means you may use technical skills to contact customers using their preferred communication software. Applying your technical abilities to communicate with clients shows your dedication to working with them and adjusting to their needs and preferences.

15. Attention to detail

If you're making daily phone calls to various clients, strong attention to detail is imperative to help you differentiate clients and their specific needs. Take consistent notes every time you speak with clients to assure them that you remember certain details they provide you. This allows you to keep a personal and unique relationship with clients even if you're unable to meet with them in person.

General rules:

- Always say “please” when asking for something
- Always say “thank you” when provided with information or assistance that was required
- Make mention of your appreciation of any special effort the other person has made on your behalf such as locating a certain person, finding required information, making a sensible suggestion that may not have solved your problem but has helped it along the way
- Always remain a professional even when the other party may be rude, unhelpful, or extremely unprofessional themselves
- Never run down a third party to the person you are speaking to. For example, do not mention to the person in Accounts the person on the switchboard was slow, or unhelpful
- Ask when a person who is unavailable is likely to be available or ask them when the best time to call.
- Use the person’s name if known or use “Sir” or “Madam” according to business protocols when talking to a caller
- Speak at a normal volume. Do not whisper and never shout
- Talk at a normal rate. Do not rush the call
- Use correct language. Do not swear, never use slang expressions, do not joke (many complaints have arisen as a result of a staff member making what they thought was a funny comment but which the other person did not find at all humorous), do not make racist, sexist or ageist comments
- Avoid using industry terms and/or business-specific terminology unless speaking to another industry professional. This can confuse people outside the organization and make them feel they are being excluded from the conversation
- Eliminate any background noise as far as possible. Turn off radios or music and close doors and windows to reduce noise from other areas
- Talk directly into the phone or headpiece or mouthpiece
- Pronounce your words correctly
- Spell out any words or terms you can realistically expect the other party will be unfamiliar with

- Be careful how you put the phone down when you are talking to the caller. Put it down gently to avoid noise to the other party
- Never talk to a third party while you are on the phone to someone else
- Ask callers if you can help them in any other way before hanging up
- Thank callers for their call, where appropriate Let the caller hang up before you do.

Customer use of the telephone

Because it is used by customers to contact the business to (amongst other things):

- Make reservations for rooms, tours and travel
- Check, query, modify or cancel arrangements already made
- Make enquiries about functions
- Seek information about prices and products
- Lodge compliments and complaints.

We must be very aware that if a customer receives bad service, or has a bad experience, over the telephone they may not follow through on their enquiry and convert their enquiry into an actual sale.

Answering calls promptly

All calls must be answered promptly to avoid keeping the caller waiting and must be answered in an appropriate manner in accordance with enterprise standards. Failure to answer the phone promptly may mean the caller hangs up and gives their business to another company. Answering “promptly” can be seen as answering as soon as possible (subject to enterprise requirements).

Using an appropriate telephone manner

An appropriate telephone manner includes the following:

- Using polite language at all times – regardless of the language being used by the caller.
- Using appropriate welcoming or greeting phrases – as set by the employer style of the greeting should reflect the style of business involved
- Showing enthusiasm (that is, a positive attitude or approach to the call) when taking a call – to demonstrate the business is eager to talk to the caller and to do business with them
- Being friendly – it is important for all those who take telephone calls to understand the need to be friendly to all callers. This friendliness while on the telephone has been referred to as the need to „put a smile in your voice“ when talking on the telephone.

Some people recommend placing a mirror near the telephone or on the desk to remind users to smile while on the phone

- Making an offer of help to the caller. A standard requirement when answering all telephone calls is to either ask the caller a direct question enquiring what assistance the caller wants, or have a positive predisposition towards providing whatever help the caller asks for.

Applying enterprise standards

Enterprise standards may relate to:

- The use of appropriate greetings or welcoming phrases when answering the telephone.

These may require you to:

- ✓ Greet the caller
- ✓ Identify the business
- ✓ Identify yourself
- ✓ Make an offer of assistance

For example:

- ✓ “Hello, Joe’s Bar and Grill, Mary speaking. How may I help you?”
- ✓ “Good afternoon, Sami’s Tours. This is Ayele speaking.”
- ✓ “Good evening, thank you for calling Sami’s Tours. Fre speaking, How may I help you?”
- Certainly, it is totally unacceptable to pick up the telephone and say:
 - ✓ “What?”
 - ✓ “Yes”
 - ✓ “Hello”
- Adherence to ring limits. Some businesses set a „ring limit“ within which they want the telephone to be answered: for example, all incoming calls must be answered within three rings
- When the enterprise sets a ring limit it highlights to staff the need to answer the telephone promptly
- Use of the caller’s name. When you know the name of the person calling it is standard practice to use that name throughout the duration of the call
- It is often said everyone likes to hear the sound of their own name (so using the caller’s name is a positive thing to do), and it demonstrates to the caller you have taken the trouble to remember who they are. Using their name personalizes the call

- Making an offer of assistance. When taking a telephone call you must always be alert to the need to (as appropriate): Make an initial offer of help to the caller, such as:
 - ✓ “Who would you like to speak to?”
 - ✓ “Where can I direct your call?”
- Be responsive to directing the call-in accordance with the initial information provided by the caller:
 - ✓ “It sounds as if you need to talk to our Function department, Mr. Maguire. I’ll connect you to Mr. Thomas, our Banquet Manager”
 - ✓ “I think you will need to talk to Peter, he’s in charge of reservations”
- Take a message if the person the caller needs to speak with is unavailable:
 - ✓ I’m sorry Mr. Smith; Mr. Grey is unavailable at the moment. Can I take a message and get him to ring you back?

Placing the call on hold

If the call has to be put on hold it should be done courteously (again, making sure you follow organizational requirements).

Always ask the caller if they want to hold, for example:

- ✓ “Can you hold the line, please?”
- ✓ “I’m sorry Mr. Hickman; Mr. Williams is not in his room at the moment. Would you like to hold while I have him paged?”

Remember though to wait for the caller’s response; the caller may not want to hold. Nothing is more annoying for the caller to be asked a question and then have you not wait for their answer!

Offering friendly assistance

At all times, callers must be spoken to in a friendly tone. Remember to put a smile in your voice.

Assistance must be offered when and where necessary without giving the impression that doing so is an imposition.

The key to answering queries is to be genuinely helpful which encompasses:

- Focusing on the call to the exclusion of other work. Do not get distracted
- Trying to understand the caller’s problem/s so your response is appropriate to the needs of the caller
- Asking questions to obtain more information to assist in providing relevant help
- Putting yourself in the caller’s shoes by seeing things from the caller’s perspective

- Taking time with the caller by not rushing the call or giving the impression you are eager to move on to another call or other work
- Checking the caller's level of satisfaction with what is happening, has been provided or is being suggested and then altering your service as necessary to improve service delivery.

The need to focus on the call

A Golden Rule when dealing with a phone call is to focus completely on the caller you are dealing with.

This means the telephone call you are answering must be your primary focus as opposed to being distracted by other calls that may be coming in, calls that are on hold or other people or customers in the area.

(Note: most businesses also require that a face-to-face customer takes priority over a telephone that starts ringing)

After the call has been initially answered it may be necessary to interrupt the call to answer another one. Where a need to do this exists you should:

- Excuse yourself from the caller you are talking to
- Answer the other incoming call and either:
 - ✓ Apologize for the delay
 - ✓ Ask them if they would mind holding
 - ✓ Put them on hold, take their details and offer to call them back, or (not the preferred option) ask if they would mind ringing back
 - ✓ Transfer the call to the appropriate person or department
- Go back to the original caller and apologies for the interruption and continue to focus on that call. Note that in some situations you will have to make a value judgment about whether to ignore the other incoming call and simply continue with your existing call. For example, when handling an already annoyed caller, or when talking with a customer who indicates they are likely to spend a lot of money with the organization (or a regular customer) it can be best to ignore other calls.
- It is generally best to answer one call at a time and get every one of them right, rather than answer every incoming call and get half (or even 5%) of them wrong, confused or incomplete.

Tips to apply when answering enquiries

The following should be applied when answering enquiries to optimize customer service:

- Remember previous advice. Put a smile in your voice (if appropriate – that is, it is inappropriate to put a smile in your voice if the caller is calling to make a complaint)
- Ensure the caller can see you are trying to help them. It is important you become part of the solution to the reason they called, as opposed to becoming an additional problem for them to deal with
- Keep them informed. Tell the caller what you are doing to try to help them. Remember they cannot see you so you have to tell them what you are doing
- Always be honest. Never make up an answer if you don't know, and make sure you tell the caller the full story in response to their question as opposed to just giving them half the story and therefore misleading them or creating unreal expectations
- Refer to documents or other staff where you are unsure. For example, prices change and advertising promotions and campaigns alter over time. Where you are not 100% sure of your facts, look it up or ask the „right person“
- Realize as quickly as you can when you cannot help the caller anymore. Callers get quickly annoyed at having to explain themselves to you and then having to do the same thing all over again to another person. Never waste the caller's time
- Try harder when you are on the telephone. Make an extra effort when dealing with people on the telephone in recognition of the fact they cannot see you and you cannot see them. Ensure your voice is appropriate and reflects the emotion you want to convey.

Transferring calls

Standard procedures for transferring calls include:

- Apologies – if appropriate – for the need to transfer the call. Where the caller has asked for another person, there is obviously no need to apologies
 - Explain why you need to transfer the call. Highlight the fact the person they are being transferred to will be best able to deal with their call
- Tell them who you want to transfer them to. Give the person's name and title or position within the business
- Ask permission to transfer their call. For example:
 - ✓ “Mr. Watts, I'm sorry I can't help you with your query but I'd like to transfer you to Mr. Brown who is the manager. Would you like to be connected to him? – I'm sure he will be able to give you the information you need.”

- Transfer the call and monitor it. If the call is not answered you must go back to the caller, apologies and make arrangements for the person to phone the caller back

Taking message

If the caller asks to leave a message or it becomes obvious a message needs to be taken, high levels of customer service must be provided. Never give the impression that having to take a message is a nuisance or a burden. It must be done as cheerfully as dealing with all other aspects of telephone operation.

When taking a telephone message:

- Use the designated telephone message form
- Make sure you capture all the information the caller gives you. The message must be meaningful and comprehensive. Remember another person will have to read, interpret and act on it
- Ensure you get the details (times, dates, numbers, prices, addresses and flight numbers) correct. Double-check them. Special attention needs to be paid to spelling of names, addresses and towns. Ask the caller to spell out names and destinations if unsure of the spelling or where variations on traditional spelling exist
- Repeat the message back to the caller to confirm it and allow them to provide extra information or detail (or change the details already provided) and make corrections (adjustments, additions) as required
- Thank the caller for their call, for leaving a message, or for calling back.

Make sure you remember this point!

If you make a promise to get back to a caller at a later time or date, then make sure you do! Sometimes it takes very little for one business to stand out from the competition, and returning or making calls when promised is one way of doing this and one of the easiest things to do. It demonstrates respect for the caller and shows you value their business.

LAP Test 1

Practical Demonstration

LAP Test 1: Make a call and confirm a reservation to a guest

Purpose: Applying proper telephone skills

Guideline: Before making a call, demonstrate the following critical needs.

- ✓ Determine purpose of the call
- ✓ Look the telephone book
- ✓ Select Country code & Area code
- ✓ Make sure you have a pen and paper
- ✓ Register date and time of the call
- ✓ Know the name of the person you wish to talk to
- ✓ Know the person`s title and position
- ✓ Know the name of the department/ company you wish to speak to
- Demonstrate task and time management for the guest.
- Demonstrate gratitude and appreciation to the guest.

Reference

Trainee Manual: Operate Private Automatic Branch Exchange (PABX) Switch Board,
ASEAN

Basic Hospitality Telephone Skills:/ Internet

PABX Machine Types and Features/Internet