[Company name]

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Phone Answering SOP

Purpose: Answer every call professionally - greeting, identifying the caller, transferring correctly, and taking complete messages. **Scope:** All incoming calls to [Company name], during [Office hours] and after hours. **Who this is for:** Anyone answering the office phone - receptionists, assistants, and anyone covering calls.

Answering calls: Greeting and identification “Good morning, [Company name], this is [Your name], how can I help?”

Adjust morning / afternoon as appropriate.

1. Answer within three rings.

2. Listen fully before speaking. Note the caller’s name and company, and use their name once during the call.

3. If you do not know the answer, say so honestly and offer to find out, rather than guessing.

Note: Never guess an answer - offer to find out instead.

Transferring calls 1. Tell the caller who you are transferring them to and why, then announce the caller to the colleague.

2. If the colleague does not answer, return to the caller and offer to take a message or transfer to voicemail.

3. Transfer urgent calls (complaints, safety issues, key clients) to a supervisor if the intended person is unavailable.

Note: Never leave a caller ringing unanswered - always return to them with the message or voicemail option.

Taking messages Use a message slip for every message:

Caller: _____ **Callback number:** _____

Message: _____ **Taken by:** _____

Time: _____

Read the number back to the caller. Pass the message to the recipient the same day and mark it delivered.

Note: Always read the callback number back before the caller hangs up.

Handling difficult calls 1. Keep your voice even and let the caller finish before responding. Do not raise your voice or argue.

2. Acknowledge the problem, summarise what you will do, and give a time by which you will respond.

3. If a caller becomes abusive, warn them once politely, then transfer to a supervisor or end the call and report it to your manager.

Note: Stay even throughout - never raise your voice or argue.

After-hours procedure After hours, the phone system plays the recorded greeting with office hours ([Office hours]) and the emergency contact route ([Emergency contact route]).

Check voicemail first thing each morning.

Return urgent messages by 10:00 and all others by the end of the day.

Log after-hours messages in the same message book so nothing is missed over weekends.

End-of-day checklist: [ ] Every call today was answered within three rings with the standard greeting.

[ ] All messages were recorded completely, read back, and passed on the same day.

[ ] Voicemail was checked this morning and urgent callbacks are done.

Checked by: [Name] - Date: [DD Month YYYY]

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Owner: _____ **Review date:** _____