# INTRODUCTION

## Greeting

“Thank you for contacting Undergraduate Admissions. May I start with your name and the student ID number please?”

OR

“Thank you for contacting University Orientation. May I start with your name and the student ID number please?”

# BODY OF THE CALL

## Actively Listen

… to what the customer is saying. Identify the issue/concern.

Keep a notepad or “sticky” on computer handy to write down items such as names, questions, important information given by caller. This helps avoid having to ask the caller to repeat themselves.

## Affirm the caller’s question

“I would be glad to assist you with that…Let’s take a look at your account” “So, I understand that you’re concerned with how to pay for college.”

## Verify Information

“…may I have your OSU Student ID or name.#?”

“Thank you. May I verify the student’s full name and date of birth?”

* Per FERPA guidelines: capture three identifying items, including two primary.

**Call the customer by name**

**Ask Clarifying Questions**

… that will help lead you to the answer while reviewing the student’s account

**Use Holds Effectively**

* Ask if you may put the customer on hold and wait for a response.

“Dr. Gee, may I put you on a brief hold while I review your account?” or “Let me look into it for you. May I put you on a brief hold?”

**Transfer**

“I would like to transfer you to \_\_\_\_\_ (office) that is better able to assist you. Would you like to write down their phone number and is there anything else I may help with before I place you on a brief hold and transfer your call?”

ENDING THE CALL

**Explain and Resolve**

* Explain the situation or offer to look into the issue and follow up.

“I’ll need some more time to review in order to provide an accurate response to your question. Is it ok if I follow up with you with the next 1-2 business days?”

**Ask if the caller has additional questions**

“Is there anything else I can help you with today?”

**Close the Call**

“Take care” or “Thank you for calling”

**Leave a comment**

* Required. Be mindful to be objective, not emotional. Summarize the interaction.

## Call-Back Feature

“Good morning/afternoon! This is from Buckeye Link at The Ohio State University. This phone number requested a call back. How many I help you today?”

## Voicemail

“Good morning/afternoon! This is from Buckeye Link at The Ohio State University. Thank you for using our call-back feature. I’m sorry that I missed you today. If you would still like to speak with a Buckeye Link counselor regarding your issue, please feel free to call us back at 614.292.0300 or email us at [buckeyelink@osu.edu.](mailto:buckeyelink@osu.edu.%20) Thank you and have a nice day!”