

Phone Handling Procedure.

Personal Extensions :

Check your voicemails on a regular basis, your phone should not be flashing.

Make sure your greeting is setup correctly. Name and Message

If you plan to be away from the desk , change your status to :

in a meeting

Out of office

On Vacation

You must change your phone status to correct Status – SELECT OPTIONS and SELECT AVAILABILITY.

Answering Calls :

Always be super polite and respectful.

Answer calls promptly, ideally within 3 rings.

Greet the caller with a warm and professional clear tone. “Good morning/Afternoon/Evening, thank you for calling Gold Key Insurance. My name is XXX, how may I help you or direct your call?”

Ask for caller’s name and their reason for calling.

Use the caller’s name during the conversation to create a personalized experience.

Listen attentively to the caller’s need and concerns.

Take notes if necessary to ensure accuracy and detail.

Address general inquiries and frequently asked questions.

If the caller’s inquiry requires a specific department or person, check who is the CSR handling the account, ask permission before placing the caller on hold.

Check if CSR or staff member is free to take a call or even in the office. You can staff schedule also or this can be done by checking on your phone status on directory and see if there is a busy schedule. If they are not free take a message with Name and Phone or Transfer the call with a warm introduction.

Summarize the discussion, Thank the Caller and any agreed upon actions before ending the call.

Email message or Send via teams to CSR – CSR should send message back - THANKS.

If you are with a client and no others are available to answer the phone . Tell the client to PLEASE hold for a few seconds.