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HW 3: Make a Phone Call

1. **Identify the problem, metric, be specific**
   ○ **Problem:** You need to communicate with someone over the phone (Objective: to successfully deliver your message or receive information).
   ○ **Question:** What is the best way to ensure a phone call is made efficiently and the necessary information is exchanged?
   ○ **Why the question:** Effective phone calls save time, avoid misunderstandings, and ensure clear communication without interruptions.
2. **What do I need to know to answer the question?**
   ○ **Action point:** Understand who you are calling, the purpose of the call, and whether it's a professional or personal conversation.
   ○ **What needs collecting:**
     ■ The person's name and phone number.
     ■ Time availability (when is the best time to call?)
     ■ Call objective: What do you need to discuss or figure out?
   ○ **Beginning data:** Gather any required information related to the call topic (e.g., questions, updates, or information to provide).
   ○ **Collect data for:** Ensuring the call has a clear purpose, and you have everything you need to complete it successfully.
3. **Identify all things I need to gather before making the call**
   ○ **Budget:** Consider phone costs if necessary (long-distance charges, international rates) or whether a phone plan covers it.
   ○ **What raw data:** Contact number, call purpose, and any related details that need to be addressed during the conversation.
   ○ **Inferences:** Based on the type of call (business or personal), decide on the tone, professionalism, and length of the conversation.
4. **Organize the data and decide what I need to collect**
   ○ **Data Cleaning:** Ensure you have the correct phone number and any relevant information before the call starts.
   ○ **Outliers:** If it's a complex call (e.g., conference call or international), ensure any extra preparation (time zone conversion or app setup) is accounted for.
   ○ **Make data usable:** Organize key points or questions in a list to avoid forgetting important details during the call.
   ○ **Data Relationships:** Understand the relationship between the contact and the call's purpose (e.g., professional discussion vs. catching up with a friend).
   ○ **Apparent vs. Inferred:** Base your conversation on facts and clear information—don't assume things without clarifying.
5. **Find and identify the relationships**

- ○ **Look for:** Connections between the purpose of the call and the expected outcome (e.g., resolve an issue, get information, or make a decision).
- ○ **Outliers:** In case of unexpected topics or questions, be prepared to adapt the conversation while maintaining focus.
- ○ **Percentage:** What percentage of the call should be dedicated to different topics (e.g., 70% for discussion, 30% for follow-up actions)?
- ○ **Chart:** Mentally visualize how the conversation should progress to ensure the right points are covered.
- ○ **Root cause:** Ensure clear communication to avoid miscommunication or confusion during and after the call.

6. **Find a solution**
   - ○ **Undo the problem:** If the call isn't going as planned (e.g., confusion or unclear answers), clarify your points or ask direct questions to guide the conversation.
   - ○ **Change the situation:** If necessary, reschedule the call or switch to a different medium (e.g., email or text) if it becomes difficult to communicate.

7. **Presentation/Tell a story**
   - ○ **Opportunities:** Through this process, you improve your phone communication skills and ensure all calls are purposeful and efficient, saving time for both you and the other person.