

## **Documentation of the Mastery: Phone Calls**

- a. Answer phones with an appropriate greeting
- b. Transfer calls
- c. Put callers on hold and pick them up from another phone

### **Proof of Mastery:**

Have a Training Proctor place a call to a general library phone:

1. Answer the call – know which line they are calling you on.
2. Tell the Training Proctor which phone you are on.
3. Put the call on hold, then pick it up from a different phone.
4. Tell the Training Proctor which phone you are on now.
5. Transfer the caller to Julia’s phone.

### **Current Training Proctors for this Mastery: Voicemail**

- Meg VanPatten
- Nancy Howe
- Julia Schult
- Erin Hart

**Resources:** This task is estimated to take 10 minutes for someone to master.

### **They will need:**

- access to a library telephone
- the documentation below, or the more complete handout Phone Instructions Basic.pdf
- May need to consult an Expert

## **Answering Phones Appropriately**

There is not “one right way” to answer our phones. Anything that is courteous and identifies us as the library is “correct”.

Examples for answering an initial call from outside the library:

“Baldwinsville Public Library, may I help you?”

“Baldwinsville Public Library”

Example for answering a transferred call:

“This is the Information Desk, may I help you?”

“This is the Children’s Desk, [your name] speaking”

“This is [your name], can I help you?”

## **How to Put On Hold and Pick Up a Hold**

1. While you are on the phone with someone, press the red Hold button once.
2. Note which phone line is blinking green, indicating the caller on that line is holding.
3. Walk to another phone, pick up the receiver, and press the line you noted in step 2, which will be blinking red on this phone.

## **How To Transfer a Person to Another Extension**

1. While you are on the phone with someone, press the Conf/Tran button.
2. Dial the extension you want to transfer the call to.
3. Wait for the phone to ring or the person to answer. Hang up and they will be connected.