

Fall 2016

# Call Processing Basics for Everyone

Natalie (Tally) Wade

*Kwantlen Polytechnic University*

Alice Macpherson

*Kwantlen Polytechnic University*

Follow this and additional works at: <http://kora.kpu.ca/facultypub>



Part of the [Business and Corporate Communications Commons](#), [Interpersonal and Small Group Communication Commons](#), and the [Other Communication Commons](#)

---

## Original Publication Citation

Wade, N. & Macpherson, A. (2016) *Call Processing Basics for Everyone*. Surrey, B.C.: Kwantlen Polytechnic University

This Teaching Resource is brought to you for free and open access by the Faculty Scholarship at KORA: Kwantlen Open Resource Access. It has been accepted for inclusion in All Faculty Scholarship by an authorized administrator of KORA: Kwantlen Open Resource Access. For more information, please contact [kora@kpu.ca](mailto:kora@kpu.ca).



*Answering the Call*

---

# **CALL PROCESSING BASICS**

## **FOR EVERYONE**

---





Call Processing Basic for Everyone by <http://www.kpu.ca/trades/public-safety>  
is licensed under a  
[Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International License](http://creativecommons.org/licenses/by-nc-sa/4.0/).

Revised: September, 2016

Every effort has been made to trace ownership of all copyrighted material and to secure permission from copyright holders. In the event of any question arising as to the use of any material, we will be pleased to make the necessary corrections in future printings.

---

### **National Library of Canada Cataloguing in Publication Data**

Main entry under title:

Call processing basics for Everyone  
(Answering the Call)

ISBN 1-896966-27-6

1. Telephone in business.

2. Telephone etiquette.

I. Wade, Natalie A., 1955-

II. Series

HF5541.T4C34 2001

651.7'3

C2001-910095-7

---

Authors:

Natalie Wade, Public Safety Communications Program Coordinator, KPU,  
Alice Macpherson, Technical Editor, KPU,

Kwantlen Polytechnic University would like to acknowledge the contributions of the many members of the Public Safety community who reviewed and gave feedback.

## Table of Contents

# CALL PROCESSING BASICS FOR EVERYONE

CALL TAKER CHARACTERISTICS .....	1
CHAPTER 1 CALL TAKER ROLES AND DUTIES .....	1
<i>Roles of a Call Taker</i> .....	1
<i>Duties of a Call Taker</i> .....	1
CHAPTER 2 CALL TAKER CHARACTERISTICS .....	5
<i>Flexibility Required of Call Takers</i> .....	5
<i>Professionalism in Call Taking</i> .....	5
<i>Empathy in Call Taking</i> .....	6
<i>Knowledgeable</i> .....	6
COMMUNICATION SKILLS .....	9
CHAPTER 3 COMMUNICATION SKILLS FOR CALL TAKERS .....	9
<i>Communication</i> .....	9
<i>Elements of the Communication Model</i> .....	9
<i>Limitations of Communication Model</i> .....	10
<i>Communication Gaps</i> .....	10
<i>Filters and Barriers to Effective Communication</i> .....	10
<i>Complexity of Communication</i> .....	10
<i>Checking Assumptions</i> .....	11
<i>Three Forms of Communication</i> .....	11
<i>Mixed Messages</i> .....	13
<i>Language Community</i> .....	13
<i>Custom (Social Practice)</i> .....	13
<i>Ethnically/Culturally Sensitive Attitudes and Values</i> .....	13
<i>Respectful Interaction</i> .....	14
CHAPTER 4 ACTIVE LISTENING SKILLS .....	15
TEAMWORK SKILLS .....	17
CHAPTER 5 FRAMEWORK FOR WORKING TOGETHER .....	17
<i>What Are We Doing?</i> .....	17
<i>Core Values</i> .....	17
<i>Mandate</i> .....	17
<i>Identifying a Mission Statement</i> .....	17

<i>Developing Shared Vision</i> .....	18
<i>Determining Appropriate Goals</i> .....	18
<i>Improving Continuously</i> .....	18
CHAPTER 6 COOPERATIVE TEAMS .....	19
<i>Definitions</i> .....	20
<i>Cooperation: We sink or swim together</i> .....	20
<i>Competition: I swim, you sink; I sink, you swim</i> .....	20
<i>Individualistic: We are each in this alone</i> .....	20
CHAPTER 7 RECEIVING AND GIVING FEEDBACK .....	21
<i>Receiving Feedback</i> .....	21
<i>Giving Positive Feedback</i> .....	21
CALL PROCESSING .....	23
CHAPTER 8 EFFECTIVE INFORMATION GATHERING TECHNIQUES .....	23
<i>Effective Call Taking Techniques</i> .....	23
<i>Techniques to Gather Information</i> .....	26
<i>Techniques to Avoid</i> .....	29
<i>Summary</i> .....	30
<i>Common Sense</i> .....	31
BASIC CALL ASSESSMENT MODEL .....	35
CHAPTER 9: USING A MODEL .....	35
<i>Call Assessment Model</i> .....	35
TECHNIQUES FOR MINIMIZING ERRORS .....	39
CHAPTER 10: THE IMPORTANCE OF ACCURACY .....	39
<i>Practical Techniques to Minimize Errors</i> .....	39
<i>Factors Contributed by Caller</i> .....	39
<i>Factors Contributed by Call Taker</i> .....	41
CHAPTER 11: CALL PROCESSING TECHNIQUES – PREPARING REPORTS ....	45
<i>Reports for Processing</i> .....	45
<i>Practice Techniques of Call Processing</i> .....	46
<i>Be Proficient in Multi-Tasking</i> .....	46

# CALL TAKER CHARACTERISTICS

## Chapter 1 Call Taker Roles and Duties

### **Roles of a Call Taker**

Think about the first time you called a company on the telephone. What was your first impression of the company based on the conversation you had with the company call taker? Call takers play the very important role of representing the company to potential customers or clients, and affect public perception of the company. A professional demeanour is of the utmost importance when dealing with the public and others over the telephone.

### **Duties of a Call Taker**

When call takers reports for their shift, they must be ready to go on time and prepared to function. This means having the proper supplies (headset, pens, notebook etc.) and the knowledge to operate the communications equipment in the centre.

#### ***Use Appropriate Phone Manner:***

- Answer phone promptly with agency name.
- Display conversational control, empathy, flexibility.
- Obtain valid information such as name, call back telephone number, etc.
- Maintain a professional and calm demeanor throughout the call.

#### ***Obtain Information:***

- Accurately determine the needs of the caller.
- Obtain caller's name, phone number, address (as necessary).
- Respond to the caller using effective communication techniques.

### **Information**

Call takers are required to gather information according to the needs of their departments.

Call takers, as members of the communications team, will ensure that the information is passed along to appropriate personnel and departments. Call takers will be aware of the policies and procedures applicable to their agency and will assist other employees as required. They will accurately record information about individuals, requests, and support needed to complete the call.

### ***Pass Information***

Call takers will ensure that information gets handed over to the appropriate personnel or department in a timely manner, either manually or electronically. In many cases, this will mean sending the information as soon as you are finished the call. Supplementary information can be passed on to update records at a later time.

### ***Allocate Resources***

It is necessary to determine, on a situation by situation basis, what information is *primary* or necessary in order to categorize the service required. You will need to do this quickly to minimize the delay in meeting caller needs.

Initiate the response by categorizing the information.

- What needs to be taken care of right away?
- What is needed to deal with the situation?
- Priority?
- Best use of resources?

### ***Support other Employees and Departments***

Other people in the department and in the institution are also part of the equation. Everyone must operate as a team to exchange information and otherwise support each other.

You are part of a team that consists of other employees and supervisors within your work environment. Each person you work with will have knowledge and skills unique to themselves. Team members can observe each other's techniques and learn from them.

You need to count on your team members during heavy workloads, during times of stress, or with difficult calls or callers. Never be afraid to ask for help in situations. Conversely, be there to help your co-workers. Do not let pride or ignorance stand in the way of asking for assistance. Do not let laziness stand in the way of helping others.





## Chapter 2

### Call Taker Characteristics

Callers to any agency will not always be pleasant and cheerful, and some may be emotional or angry when they call. The following characteristics will help call takers to deal effectively with a variety of callers.

#### **Flexibility Required of Call Takers**

Flexibility is a crucial attribute in effective call takers. Flexibility refers to the call taker's ability to adapt to changing situations, environments, and callers in an efficient, professional, and swift manner. When dealing with the dynamics of a call, you as a call taker will sometimes be required to adapt to difficult situations under great amounts of stress.

Call takers must also be able to suspend their own reaction to a previous emotional call in order to handle the next incoming call. They must do this without showing signs of the previous turmoil. Every caller is worthy of the same high level of professionalism and courtesy, and should be left with the impression that their call is as important to you as it is to them.

The call taker's job is multi-tasked, and runs the gamut from the basic to the very complex. The workload will vary greatly in volume and intensity. The work environment provides its own internal stresses and challenges as call takers deal with the different personalities of their co-workers.

Flexibility is a critical ability that enables the call taker to be an effective support in any situation and in any environment.

#### **Professionalism in Call Taking**

Professionalism is a standard of conduct within your industry. You must maintain a standard that is equal to other groups within the system of which you are a part. You the call taker are responsible for ensuring that the caller's initial contact with your agency is a professional and positive one, and that the caller gets a good first impression of the service they are contacting. The caller will judge your agency on the basis of his or her experience with you, the call taker. Your professional conduct should reassure callers that their problems, whatever their nature, will be given full attention. Conversely, if callers perceive that you have treated them unprofessionally in any way, they may assume the entire organization to be equally unprofessional.

Some callers may be confused and looking for direction and reassurance that they are calling the right place. How you represent your agency may

affect the caller's sense of how accessible your services are. Your professional phone manner will assure them that you are prepared to help them, and will enable you to get the information you require to do that.

## Empathy in Call Taking

Empathy is the ability to understand the feelings of another person as one's own. It is being aware of and sensitive to the feelings, thoughts, and experiences of others. For a call taker, empathy is the ability to understand the caller's situation at that moment, and is the first link in connecting with the caller and the caller's emotions. Callers' situations and emotional states will vary widely.

Most callers have initiated contact to seek help or information, but may be confused about the service they require or the information they need to provide. They want information and help, but may not know the process they must follow to get it. You, the call taker, are expected to provide the answers they are seeking.

Empathy is a vital link in establishing a line of communication with the caller to facilitate obtaining the information required to render assistance. Empathy gives you the ability to relate to the caller and to establish rapport. When you have established rapport, you will be better able to determine the reason for the call and to offer information or service. Once you begin to understand the reason for the call, you can identify the reason behind it and seek a solution for the caller.

## Knowledgeable

A call taker should be knowledgeable about *equipment* and about *the job itself*.

The equipment used by most call takers includes the telephone, headset, computer terminal, and other related pieces. Knowledge of how to operate the equipment used by your agency is essential. Becoming familiar with all aspects of how to operate the equipment will prevent delay when you need to do something fast. Know how to transfer calls, how to conference them, how to use speakerphones, how to hold calls, dialing capabilities, and so on. Know where the manuals for the equipment are and what to do in case of equipment failure, power loss, or other interruptions.

Knowledge of the job itself includes product knowledge of the services your agency provides. The professional call taker never makes assumptions. As a call taker, you must have information that is current and

correct and must be able to apply it correctly to the situation at hand. The call taker must be able to answer questions with factual information, and to direct callers to the appropriate departments or resources. Respond to questions you are qualified to answer within the scope of your duties, and pass others on to the appropriate persons and sections. You do not have to memorize all details, but if you do not know the answers, know where to find them. Do not make something up just to pacify a caller for the moment; your misleading information may come back to haunt you or your agency. Do not misdirect someone out of ignorance or pride.

If you need to put a caller on hold for any reason, explain to them what you are doing and why, and then make the interruption brief. Do not be afraid to admit that you are not sure about something, but make it your mission to find out. If you do not know, ask. The caller benefits, and you benefit by gaining more knowledge.

You will be required to perform with equal efficiency using either a manual or fully automated system. *To be an effective call taker, you must be an effective communicator!*



# COMMUNICATION SKILLS

## Chapter 3 Communication Skills for Call Takers

The public expects call takers to be professional, empathetic, understanding, and prompt with results.

Effective call takers are quick, have a short recovery time between calls, have excellent listening skills, and are able to multi-task and process information on many levels at a time. They are also assertive, well-balanced (including having a good balance between home and work), they are knowledgeable, and possess common sense/instinct.

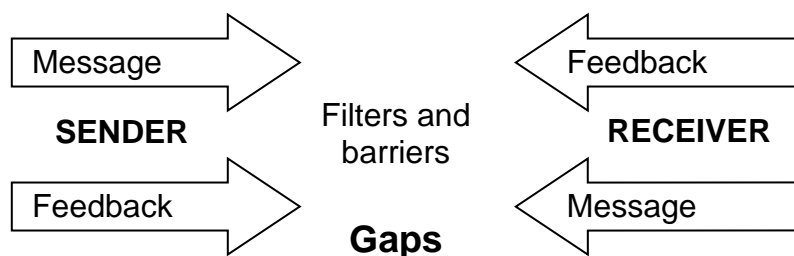
### Communication

Communication is the transfer and understanding of information using whatever means, continuous and irreversible.

### Elements of the Communication Model

1. Sender – familiar with shared rules for communication
2. Message – issue, concept, situation that is being transmitted
3. Receiver – knows the rules for communication
4. Feedback – information about what was received
5. Filters and barriers – exist and distort messages sent back and forth.

Imagine the gaps between the arrows getting larger or smaller depending on various internal and external influences.



## Limitations of Communication Model

This communication model suggests that at any given time a person is either sending or receiving. It isolates a single act of communication from the events that precede and follow it. In reality, most communication is a two-way transaction in which we both send and receive at the same time.

## Communication Gaps

The following items will influence and affect clear communication with others:

- The **sender's** past experiences, background, feelings and circumstances will influence the way they communicate.
- The **receiver's** past experiences, background, feelings and circumstances will distort what they hear.
- The **environment** interferes with the message due to noise, equipment failure, temperature, and other external factors.

## Filters and Barriers to Effective Communication

Barriers to effective communication can be external or internal and include physical and emotional factors. Some examples are language, unfamiliar setting, physical discomfort, and emotional distress.

We also filter our understanding through our values, beliefs, and life experiences. Individuals are unique and come from backgrounds or fields of experience that may either help or hinder their understanding of the communication of another. Misunderstanding can arise particularly from cross-cultural communications where underlying culture-bound values come into play in the interpretation of the other's message.

## Complexity of Communication

As our global environment becomes more interactive, communication becomes more complex. Consider a few contextual differences between people that add to the complexity of communication:

- Belonging to different ethnic and cultural groups
- Coming from different socio-economic backgrounds
- Differences in quality and quantity of life experience
- Rushing vs. passing time

## Checking Assumptions

We make assumptions about meanings when we communicate with others.  
Think about the truth in this statement:

*I know you believe you understand  
What you think I said,  
But I am not sure you realize  
That what you heard  
Is not what I meant.*

For instance, when we make assumptions, a constructive suggestion can be taken as criticism or a joke can be taken as an insult. If the assumptions of meaning are not understood and are not accurate between the communicators, they can become barriers to understanding. In other words, if an action that is normal and acceptable in one culture is considered rude in another, then the assumptions we make can affect our understanding of the intended message.

These and many other differences can be understood and mitigated to increase the quality of communication. When assumptions are checked out with the sender, the communication gap is reduced, enhancing the accuracy and level of communication.

## Three Forms of Communication

There are three basic forms of communication you need to be aware of when decoding messages from another person. They are *verbal*, *non-verbal*, and *symbolic*.

### 1. Verbal

Verbal communication is an active form of communication that involves the use of words, both spoken and written. Words themselves have no judgmental or emotional quality. They are maps or indicators that convey information that may or may not be interpreted in a similar way by different people. It is our personal interpretation and use of words that gives them life and meaning.



## 2. Non-Verbal Communication

Non-verbal communication is another active form of communication that includes

- body movements,
- gestures,
- posture,
- eye contact,
- facial expressions,
- vocal cues, and
- spatial relations or proximity.

*What you do  
communicates more  
than what you say!*

Perhaps you have had an experience recently where a person's non-verbal communication spoke volumes to you about how they were feeling. What was their body posture like? What were they doing with their eyes? What did their tone of voice signal? Now, think about the non-verbal messages they may have received from you. Were you mirroring their messages or contrasting them? Finally, how did the transaction conclude?

People tend to use non-verbal forms of communication more intensely when they are emotionally affected either positively or negatively. These messages will vary from culture to culture and from person to person. Being able to accurately read these messages allows us to respond more intentionally to these situations.

## 3. Symbols as a Form of Communication

Symbols are passive forms of communication. Examples include signs, labels, maps, books, etc. Less obvious symbols are the clothes we wear, our hairstyles, watches, accessories, etc., that give others messages about us.

Symbols often represent different things to different people. For instance, in some countries people wear black as a sign of mourning, while in other countries people wear white when a loved one dies. Assumptions and generalizations we make about symbols may be incorrect, so it is important to check them whenever possible.

## Mixed Messages

Nearly all communication includes two or more of these three forms of communication. Communication goes awry when the messages in the different forms are incongruent with each other.

## Language Community

A language community consists of a group of people who know their rules of speech (words, jargon, rules), e.g., English spoken in the Maritimes *vs.* on the Prairies *vs.* in the United States *vs.* in England. (e.g., “I’ze the b’y that builds the boat ... *vs.* I’m the boy that builds the boat). It incorporates any language transaction that conforms to rules and conventions understood by members of the language community. Only fully participating members of a language community will know the games or rules.

## Custom (Social Practice)

Two people of different backgrounds are having dinner and one person offers the other person some food saying:

“You must try some of this.” (Aggressive voice tone)

“You should try some of this.” (Suggestive/Assertive)

“You might try some of this.” (Offering choice)

Discuss and rank levels of perceived rudeness from your own background.

- Every community has ideas for situations in which various topics are OK, e.g., formal speech, off-colour jokes.
- Communication is an important element in cultural interactions.

## Ethnically/Culturally Sensitive Attitudes and Values

The following DO and DO NOT lists are adapted from material by Mercedes Tompkins and Casea Myrna Vasques, from an interview with Elva Caraballo.

### DO

Do with, come alongside, assist, provide input, facilitate, provide additional resources, encourage, respect, show concern, empathize

### DO NOT

Do for, lead, control, advise, determine, impose additional requirements, mandate, condescend, paternalize, sympathize. (End of excerpt)

This is not very different from how most people want to be treated. Interestingly, many people believe that the process by which we interact with others should be different from how we want to be treated. It is often

useful and always polite to inquire respectfully how a person wishes to be treated or helped.

What problems might you encounter with the Golden Rule (*Do unto others as you would have them do unto you.*) if it is only based on roles and behaviors from a single culture? How does it become useful if it is based on mutual respect and attention to process?

## **Respectful Interaction**

Respectful interaction is a key element to resolving the immediate conflicts that may arise when the diverse needs of the public intersect with the public safety agency's internal culture. The communication skills of *active and empathic listening and paraphrasing* followed by *effective questioning and feedback techniques* are all elements of respectful interaction. Personal flexibility and adaptability to the caller's needs is a necessary trait for the public safety communicator to do his or her job well.

## Chapter 4

### Active Listening Skills

Active listening is a learned skill. It means that as a listener you assume responsibility for ensuring that you understand what the speaker is trying to communicate, and demonstrate that you are genuinely interested in what is being said. In public safety communications, active listening is particularly important to ensure accurate information and appropriate responses.

#### ***Check for Total Meaning***

When people speak, they convey two types of messages: content, and attitudes or feelings. When you listen actively, you need to listen not only for the facts, but also for the feelings behind those facts. For example, if someone says, “Well, I’ve finally finished that project I was working on last week,” there is probably an underlying feeling such as fatigue or relief that needs to be recognized.



# TEAMWORK SKILLS

## Chapter 5 Framework for Working Together

### What Are We Doing?

As we work with others, we must identify how to do it successfully if we intend to work together well.

### Core Values

Your personal beliefs are the core values that affect and drive how you look at the world, your behaviour in the world, and your interaction with others. They are your guide for how you ‘do business’ with the rest of the world. In other words, they are the basis for everything you are and do. Beliefs about appropriate behaviours, attitudes, and strategies also guide every working group and need to be explicit and understood.

### Mandate

It is useful to know what you are expected to do in a group situation. This is often determined by or requested from an administrative or political level and appears in the form of a job description. A group that is mandated may not be able to affect the general outline of the mandate. The context in which the group operates has critical effects on what can be done.

### Identifying a Mission Statement

A mission statement embodies a group’s current purpose and intent and answers questions (within the mandate of the group) such as: What are we about? Why are we working together? What do we want to achieve? A mission statement describes the business you are in. This may be a statement developed by the whole organization or it may be more localized in a department, program, class, work group, or at an individual level. It gives direction to actions. Without knowing your mission, you may not be able to get started.

## **Developing Shared Vision**

Vision is a future-oriented statement of a group's or work team's purpose in a task or project. Having the members share a vision that aligns with their personal values and aspirations is a solid basis for production. Time spent at the beginning in dreaming and discussing what the final result will be is time well spent. If members of a group do not have a shared vision of the end product, and the goals and milestones that must be reached, they may also have difficulty identifying whether they have accomplished their purpose.

Sometimes, when a project is open-ended or ongoing, the final product cannot be totally envisioned at the beginning. A shared vision will then incorporate the agreed-upon elements of what the group wants to achieve at that time, and will provide direction for moving toward achieving these goals.

Visions should be revisited and refined over time. If a group is not heading in the same direction, it may not get anywhere.

## **Determining Appropriate Goals**

It is important to develop appropriate goals, to make them explicit, and to share an understanding of each one. Goals lead towards the realization of the vision. What are the individual tasks and goals that will build to making your vision manifest?

Goals have:

- Targets: where we expect to get to, balanced realistically with time and resources.
- Objectives: identifiable, measurable, and achievable steps.
- Tasks: ways of reaching the objectives.
- Indicators: ways of measuring progress.

Like vision statements, goals need to be realigned with reality on a regular basis. Evaluation and adjustment drive this process.

## **Improving Continuously**

Knowing where you are going and how you intend to get there is a good start. The final step is continuous improvement. Planning, implementation, and verification are tools for analysis and change as the process unfolds. Improvement is continual, but the steps are small. Pick changes that can be made now that will have a positive effect – one per cent is enough each time.

## Chapter 6

### Cooperative Teams

There are many ways a group can work together well. This guide focuses on cooperative team building to help individual teams and groups function more effectively.

#### *Why Use Cooperative Teams?*

- Industry requires people who can work together. The Conference Board of Canada has said that people need academic skills, personal skills, and teamwork skills.
- People often manage conflicts destructively. We tend to behave as we have been taught. Highly individualistic and competitive environments may lead to an inability to get along with others or to resolve conflicts constructively.
- Researchers have found that 90 to 95 per cent of the people who lose their jobs do so because they cannot get along with other people on the job. Only 5 to 10 percent (depending on which studies are cited) of people lose their jobs because they cannot do the work. Cooperative team building helps people learn communication skills and therefore increases the chances that they will be able to keep their jobs.
- We all bring with us our own negative attitudes and prejudices. Population diversity is becoming more the norm than the exception in many places. When there is a mix of employees, there is the potential to diminish negative attitudes and to develop positive ones, depending on how interaction is structured. Cooperative teams can be used to develop constructive and supportive relationships.

Every time people work together, a decision must be made about the strategies that will be used. Work may be structured so that:

- Individuals compete in a win-lose struggle to see who is best.
- Individuals work on their own, individually, without interacting with others.
- Individuals work in pairs or small groups to help each other master and complete the assigned work.

Knowing when to work competitively, individualistically, or cooperatively is an essential skill we all need. Each style of working is useful at some time.



## Definitions

Based on the work of done by D. and R. Johnson, and E. Holubec on Cooperative Learning published through the Interaction Book Co.

### Cooperation: We sink or swim together

Teams are structured so that members work together to maximize their own and each other's learning and production, and to achieve shared goals.

- All members of the group strive for each group member's success.
- Teams are small groups that are usually heterogeneous.
- Joint success is celebrated.
- Achievement is evaluated by comparing performance to preset criteria.

### Competition: I swim, you sink; I sink, you swim

Activities are structured so that individuals compete with each other to achieve a goal only a few can attain.

- Individuals work alone.
- They strive to be better than the rest of the group.
- What benefits self, deprives others.
- Own success and others' failure is celebrated. Rewards are limited.
- Individuals are ranked from *best* to *worst*.

### Individualistic: We are each in this alone

Individuals work by themselves to accomplish learning goals unrelated to those of other learners.

- Individuals work alone.
- They strive for their own successes.
- What benefits self does not benefit others.
- Own success is celebrated.
- Rewards are viewed as unlimited.
- Individuals are evaluated by comparing performance to preset criteria.

## Chapter 7

### Receiving and Giving Feedback

#### Receiving Feedback

If another person offers you feedback, it may sound like *criticism*. It may be that they intend to be positive but may not know how to say something positively. It may also be that their self-esteem is low and they are being defensive or aggressive towards you. Most importantly, you may become defensive or aggressive if you see their feedback as critical or negative, **no matter what was meant**.

Attempt to suspend your reaction until you understand the information that is being given. Paraphrase what you hear. If it seems unclear, ask for clarification. Having it presented in other words or from another point of view may increase your understanding about what is being said.

Explore and discover the reasons for the comments.

- Is a change by you indicated?
- Is it an evaluation of the past or an indication for the future?

Think about and cope with your possible defensive reaction.

- Do you see wants as demands?
- Do you feel guilty or obligated?
- Are you hearing more than is being said?

Ideally, listen to his/her comments and find the positive side of them. Then, explain your position or point of view without feeling that you must justify yourself. Determine the importance of the message to you. You may choose not to change.

Any discussion will profit from more information. You can wall yourself away from information and change by being defensive. You may open new lines of communication by being open.

#### Giving Positive Feedback

It is easy to criticize and to think that we are helping a person deal with a situation. To give the right commentary, at the right time, to the right person, with the right reasons, in the right way, and to the right degree is **very difficult**.

You first need agreement to interact. If the other person is not ready to hear your comments, you set up a negative interaction that will cause them to

block you and your opinions out. If you do not have permission to comment, you may be seen as aggressive and the other person may respond by being aggressive or defensive towards you.

Ask if the other person wants your feedback. If they say *no*, then you will have to discuss or problem-solve that before you say anything more, or you will say nothing at all.

Search out all the facts you can prior to giving your feedback. Ask the people involved about what they feel is happening and how they see the situation. This may solve or help to solve the problem.

Time the discussion so that you are all reasonably unstressed. Leave time so there is another chance to talk before a parting of ways. This will help to avoid or clear misunderstanding or confusion.

**Be Positive.** Try to begin and end your feedback with comments about what is working, correct, or right about the situation. No matter how *bad* you perceive things to be, there will be good points to comment on.

**Avoid using absolutes or negative words**, like *always* or *never* or *don't*. Each situation tends to be many shades of grey rather than black and white. Actions taken are seen by each person in the light of his/her own experiences and perceptions. Use alternative positive words and phrases. Avoid comparing the person involved to other people in other situations. The *where*, *when*, *what*, and *who* of each situation are different. Comparisons tend to produce resentment and frustration.

**Be Specific** in your description of the problem. Avoid vague or misleading statements. If attitude seems to be a problem, show specific instances and then take one point at a time so as not to overload or overwhelm the other person. Make sure it is something that *can* be changed.

When you tell someone that you feel they could improve or change, then also make suggestions on how you think they might go about making those changes, and what behaviour would be observed if the changes were made. Be prepared for no change.

Feedback can be positive if it:

- is offered at the right time and place,
- is offered with comments on good points as well as changes,
- is connected to facts and not rumours,
- is directed to behaviour that can be changed,
- is specific and one point at a time, and
- gives information and possible solutions to change the situation.

# CALL PROCESSING

## Chapter 8 Effective Information Gathering Techniques

### Effective Call Taking Techniques

#### *Assertiveness – Controlling vs. Leading*

Assertiveness is the ability to take control of a situation and is an essential characteristic of an effective call taker. Call takers *must* establish control of the conversation in order to gain the required information as quickly as possible. They must be able to deal effectively with callers under stress who may ramble, in order to determine what kind of assistance or help the caller needs. Call takers must know what information *they* need and how to extract it from the caller. They must be *assertive without being aggressive*.

*Controlling* a call is more effective than *leading* a call. *Controlling* the conversation by asking specific questions will help to insure that correct information is passed on to field units, whereas *leading* a call can result in inaccurate information being passed on. Asking the caller “What colour shirt was the suspect wearing?” forces the caller to recall the colour of the shirt, whereas asking “Was the suspect wearing a red shirt?” may result in the caller simply agreeing with the call taker and thereby giving incorrect information.

#### *Voice Modulation for Conversational Control*

Call takers must gather information as quickly and as accurately as possible. Using voice modulation to control the conversation allows you quickly to develop a positive rapport with the caller and to accomplish your goals. Each call requires judgment on the part of the call taker to determine which method would be most effective for gathering information. Sometimes it will be a combination of techniques. Experienced call takers will develop their own style and will be somewhat flexible in choosing the information-gathering techniques to use.

Following are some voice modulation techniques to use for conversational control. When to use each of them will depend on the situation and the call taker’s judgment and experience.

### **Businesslike**

A businesslike tone of voice will be most effective with those who may have had negative experiences with previous call takers or agencies and may assume they will again be victims of substandard service. They may appear irritated or hurried on the phone. A businesslike tone will assure them that you are knowledgeable in your job and that you appreciate the time they took in calling.

An example of this would be a person calling for service who has been left on hold before. He *assumes* that when he calls he will have to wait and perhaps not get through. He may say, “Look, I’m a busy person and I don’t want to get stuck on hold again. Do you think you could just answer my questions right away?” The call taker would reply in a direct but polite manner with, “I need to get some information from you first, sir, then I can find the information you need as quickly as possible.

If a caller says something derogatory like *I pay your wages*, or *Do you think that you can get me that information before next week?* ignore the sarcasm and get straight to the point. Regardless of the insults, –you may hear all sorts – resist the impulse to respond in kind. Reply firmly and politely that you will be able to address their needs as soon as you get some information from them. Do not allow yourself to get into an argument with a caller. Reduce the risk of callers lodging complaints against your agency and yourself.

### **Clear, Concise and Respectful**

Use a clear and concise tone of voice to gather the minimal amount of information you require to identify immediate needs, and to keep the caller on the line to gather subsequent details from the call.

A line rings and the caller asks for information but is unsure of what they actually need. You may have to direct the caller to keep them focused on providing the information you require in order to help them. Certain phrases may be used in order to control the call, such as: “Mr. Smith, do you need the registration department or the finance department?” or “I can do the following things for you at this office. (and then list them)”

Imagine someone has asked for three different responses, “I want to register, arrange my loan, and get a map to the institution.” As the call taker, you could say: “What do you wish to register for? When we know that, I can get you information from financial services, and then we can sort out how to get to the right place.”

This kind of a response from the call taker should assure the caller that he or she has been heard, and should make it easier for the call taker to get the rest of the necessary information from the caller. Handling calls in a clear, concise, and respectful manner will result in shorter conversation times.

### **Reassuring Voice**

Use a reassuring voice when you need to reassure or calm the caller. This is often most effective when dealing with people who are hesitant and may be intimidated by trying to work their way through the telephone system, regardless of their need. They need reassurance that they have reached the right place or will be directed to the appropriate resource. They may be easily intimidated by an officious or authoritative phone manner. Using a friendly manner and tone of voice will put the caller at ease. Reinforce the fact that you are there to help them.

A caller who is hesitant and says something like, “Um, I’m not sure if I have called the right number” needs reassurance. A soft voice replies, “How can we help you?” or “We don’t do that here but you might try ...”

Some people apologize for calling and say things like, “I’m sorry to bother you but ...” You may say something like “You’re not bothering me at all; what can we do to help? What can I do to help you?”

### **Quiet Voice**

The quiet voice can be effective in getting the attention of a caller who is losing control or not focusing on the call taker’s questions. When the call taker lowers the volume and tone of their voice, the caller is forced to concentrate on listening to what the call taker is saying.

### **Raising Your Voice**

There will be times when the call taker will have to raise his or her voice, either to gain control of the situation or to be heard by the caller. Some callers may not be focused clearly and will only listen to an authoritative voice. Voice elevation is sometimes required to get callers’ attention back to the purpose of their call, or to get them to communicate the desired information. Some callers have lost control due to frustration or anger. It is up to the call taker to get them on track to what is required.

An example would be a frustrated person who calls and says in a loud voice, “This is the fourth time I’ve called. I never get through.” The call taker would reply, in a pleasant voice loud enough to be heard, “You are through now. How can I help you?” The caller needs to be refocused away from their frustration to the purpose of their call.

It is prudent to gradually escalate the volume or the authority you express in your voice. It is best to do this slowly and not during the initial contact, as the caller might become defensive or even more frustrated. Once you have established control by raising your voice, you can return to a normal speaking voice. An experienced call taker knows within a few seconds if this technique will be effective in gathering information.

## Techniques to Gather Information

Voice modulation is not enough to get the job done. You need questioning techniques to extract the required information from a caller. Callers have contacted you for help or information, but to help them, you need to tell them what *you* need and what *they* need to do. Your job is to ask the right questions.

### *Open-Ended Questions*

Use the technique of open-ended questions when a general response is required. It allows the caller a greater opportunity to expand on their needs and will supply you with more information. You can ask questions such as: “What information are you interested in?” This also allows you to prompt the caller. For example, “Would you like us to send you a brochure or application?” or “We have three possibilities in that area for you.”

**Note:** You are not leading the caller here, you are simply guiding him or her into identifying the information they are seeking and then focusing it.

### *Closed-Ended Questions*

Use the technique of closed-ended questions when only a yes or no answer is required or when the call taker needs the information quickly. An example of when this type of questioning would be used would be during a session when you were filling in information on a form. To fill in the blanks, the call taker would quickly ask direct questions requiring no more than a *yes* or *no* answer. It is important to listen for the *no* behind every *yes* if there is any hint that the caller is trying to please you or not embarrass you with a negative answer. Double-check in a cheerful manner if you have any doubt.

### *Summarize/Paraphrase*

Summarizing and paraphrasing are effective techniques used to restate the main idea of the call, thereby encapsulating the conversation. This involves integrating the important details of the conversation and restating them to

the caller using key words. Not only does this ensure that the information given is accurate, but it may also stimulate further observations on the part of the caller. This technique of repeating information to verify correctness is also referred to as ‘mirror question.’

Using the same example as above, the call taker would summarize the call by saying, “So we will send you a copy of the brochure and an application form. Then you can then call us with your choices.” This prompts the caller to agree, disagree, add new information, or ask another question, “Oh, I also wanted to know what hours you are open.”

Another example has the caller telling the call taker, “There’s a course that I am interested in, but I’m not sure about the application details.” The call taker would use the key word technique:

“You’re interested in a *course* and need the *details* of making the *application*.”

The repeated use of key words shows the caller you are listening to them and care about their call. This technique also helps to ensure accuracy in important details of the call. While employing this technique, call takers must be careful not to make assumptions about what was said, or impart their own perceptions or ideas to what the caller has stated. Be clear and concise in your paraphrasing.

### ***Minimal Encouragement***

While this is not a direct form of questioning, it is a technique used to keep the person talking, and confirms that you are listening: *Yes, uh huh, okay, mmmm*, and so on.

Using this type of response can reassure the caller that the call taker is listening to them and encourages them to keep talking. This method is used when the caller is on track to encourage them to continue.

### ***Clarification***

Use the technique of clarification to correct discrepancies in the information the caller has supplied. The call taker focuses on discrepancies made during the call and not on the inability of the caller to provide the correct information. The call taker states the discrepancy and then asks for clarification.

For example, if during the conversation the caller said they were interested in a class on the weekends, then later on said something about taking



evening classes, you could say something like: “I understood that you were looking for weekend classes. Do you want information on evening classes as well?” Instead of putting the caller on the defensive by saying he or she made a mistake or is wasting your time by asking for one thing if they want another, you are just requesting clarification in a neutral tone of voice. If you’re not sure, ask for clarification!

### **Neutral Probing Questions**

Some callers may be vague in their description of what they want. They may use phrases such as, “I think I want ....” or “I have some interest in ....”. What you will need is more information. The call taker needs to use neutral questioning techniques to determine what the caller needs. These types of questions do not give information but ask for more information about the situation. “Tell me what areas are of most interest to you.”

### ***Building Rapport through Self-Disclosure***

Call takers use the technique of building rapport through self-disclosure to attempt to establish a relationship with the caller by empathizing and/or sharing a personal experience with him or her. It takes a certain measure of experience and good judgment to develop this technique. It works best when a basic relationship has already been established between the caller and call taker. It is also a useful tool for smoothing interactions with a difficult caller and getting them on the call taker’s side. Used appropriately, the practice can reflect positively on you and your agency and can help to create good public relations. Use self-disclosure cautiously, however. This technique is generally not used in brief situations or when the caller is very impatient because it elicits personal information and can generate too long a call. When using this method, the call taker must be careful not to overshadow or negate callers’ opinions, emotions, or situations by focusing too much on his or her own experiences.

Examples for effective use of self-disclosure:

**Difficulty getting through on the line:** You might say: “I’ve been very frustrated myself being kept on hold for a long period of time. Now that you have finally got a live voice, I would be happy to help you find the information you are looking for.”

**Not sure how to proceed:** You might say: “I have been undecided about my next step at times, too. I know that it can be a big step and you must be feeling that you want to make the right choice. May I send you information

so that you can think through what you want to do without the pressure of being on the phone?”

## **Techniques to Avoid**

### ***Multiple-Answer Questions***

An effective call taker must focus their questions to a single response from the caller. Otherwise the caller may become confused, and may still be answering your first question while you are already on your third. Such a situation can result in incorrect or inaccurate information being given and taken.

Ask questions in order of priority. Go on to the next question based on the information you have received. For example, “What is the course you are interested in?” and “Which location are you interested in?” and then “What date do you want to start?”

Instead of asking, “What course do you want and which location and which date?”, ask each question individually and tailor your subsequent questions to build on the information given. Otherwise, the caller will be confused about which information you require first.

### ***Caller Cross-Examination***

Cross-examining callers questions their credibility and may put them on the defensive, or they may become uncooperative.

As an example, assume the caller is registering for a course. You explain the prerequisites and the caller seems unsure of how this applies to them. If the call taker says, “Are you sure that you can meet these requirements?” the words may indicate disbelief in the caller’s information.

If you are unsure about the information given to you by a caller, move to clarification. Say for example: “You need to have a Dogwood diploma or GED. I would just like to clarify that this is the equivalent of high school graduation in another province.” Such an approach is less confrontational. The call taker should always be aware of their use of spoken language including words and inflection and the further consequences of its poor or incorrect usage.

### ***Leading Questions***

If callers are confused or panicky, they are easily led into supplying answers that are not always correct. People may try to come up with the

answers they think you want. If you start leading the call, they may try to pick up on clues and answer accordingly. An experienced call taker can extract information from a caller by making him or her *focus* and participate in solving his or her own problem. As stated above, people often will anticipate or assume the answer you are looking for. Some callers feel inadequate at not being able to provide the answers you seek and will look to your questions for clues. If the call taker is *controlling* the call, the caller will be supplying actual information, not simply giving you the answers he or she thinks you want.

The following example illustrates how leading questions can result in misinformation. When the caller says, “I’m interested in getting some information,” the call taker asks, “What information do you need?” The call taker then *leads* the caller into an answer by asking, “Do you want information on our Business programs?” The caller answers, “Yeah, I think so.” They may not want a business program. Your job as a call taker is to respond to the caller’s needs, not to suggest answers.

## Summary

To be an effective call taker, you must be an effective communicator. Use the skills you are comfortable with and practise the ones you have trouble with. Use the attributes of each skill and learn to combine each as the need arises. If you are proficient in all of them, you will instinctively apply them to each situation. Many of our examples illustrate how different techniques are used in combination to elicit accurate information.

There are exceptions to almost every written rule. Judgment calls are based on the application of common sense, experience, and good faith. Be professional in your attempts to gain and give information. To improve your skills, observe other call takers and the methods they employ on calls.

Do not play to the audience. Other people may be watching or listening to you in the workplace, and it may be tempting to try to make an impression. Do not fall into the trap of trying to amuse the other people in the room by mimicking your callers. You alone are responsible for your call. Act professionally.

Common sense is the ability to apply judgment and sound reasoning to the decision-making process. The application of these concepts is an essential requirement to becoming an effective call taker. Every decision and action you take will involve common sense based on your product knowledge, resources, training, and life experience.

Practise common sense. You have life skills that can be applied to effective call taking. Recognize them and observe them in others. Experienced call takers recognize that they can still learn from callers, situations, and other call takers.

Experienced call takers also recognize their own limitations.

Communicators cannot be all things to all people. Know your own personal limits. Do not underestimate the emotional effect some calls may have on you. Seek help when you need it from your co-workers or your supervisor. In cases where you do not know the answer, find out and rectify the problem. Do not pass the buck, and never lie to a caller because you do not know the answer to a particular question. Do not give information or directions without first being sure the information is correct. Act in good faith. In other words, always say or do what you believe is correct according to your department's policies and procedures.

As a call taker, you are part of a team of service providers. Depend on your team members and try to become someone who can be depended upon. Ask intelligent questions and be receptive to constructive criticism and comments.

Always remember that *you* are the one who is ultimately responsible for your actions. Never lose or misdirect a caller out of ignorance or pride. *Always* act in good faith.

## **Common Sense**

Common sense is the total of your experience and how you apply it in a familiar context. It is not something you are born with. Instead, it is an ability that you can develop through focusing on four key areas: training, limitations, judgment, and resources.

## ***Training***

Training can be accomplished in a variety of ways. We experience formal training in a school or an institution. We learn procedures and policies, and we can practise them in a controlled setting. Life also offers us training. It is not uncommon to hear people say something like "If I had known then what I know now, I would have acted differently." People say that education is a lifelong experience, and that applies equally to learning in your career. Take advantage of training opportunities as they come along.

You will never know all there is to know, nor will you ever see it all. If you think you have seen it all, you may close your mind to new experiences.

The more experience you gain in call taking, the better you will become, and the more you will be able to relate it to other experiences. Keeping an open mind will allow learning to continue to happen.

### ***Judgment***

Always act in good faith. If you take the proper steps and follow procedures to the best of your ability, your superiors are less likely to find fault with your actions. If they do criticize you, you can justify your actions by saying that you erred on the side of safety. It is difficult to condemn someone for acting ethically.

In some cases, you may not know what to do. If you are not sure, ask. Verify the information that you give out or the actions you take. You may need to pose a lot of questions in the beginning. Ask them and learn.

Double-check, be concerned, and be prepared to answer for what you did. You are responsible for your actions. Justify them! This helps you to develop your sixth sense. Develop your instincts and learn to follow them. They will serve you well.

### ***Limitations***

There is a lot to know and do in any type of call taker position. You cannot possibly know everything. Some days can be overwhelming. Know yourself; know when to ask for help, and know when you have had enough. Your co-workers are there to work with you as a team and to pick up the slack for each other as the situation requires. Ask for help when you need it, and be sensitive to when others need your help.

In a communication position, you do not and cannot work in a vacuum. It is truly a two-way street, the ultimate in teamwork. When you are working in cramped quarters every day with someone else, it is wise to learn quickly to get along just so you can co-exist with your colleagues. A call taking job can be stressful enough without having to worry about the space you are sharing.

### ***Resources***

There is a lot of information overload in call taking. There are schedules, brochures, policies, procedures, and so on. Your supervisors will not expect you to be able to quote line and verse from every document, but they will expect you to know where to find the information in short order.

Keep a reference book close at hand. Make yourself a ‘cheat book’ that lists procedures, message formats and other procedures that are not routine. Review the books regularly: learn about dealing with a particular situation *before* one actually occurs. If you are comfortable in flipping through procedures, you will know where to turn when the need arises.



# BASIC CALL ASSESSMENT MODEL

## Chapter 9: Using a Model

The fundamentals of call processing must be practiced *each* and *every* time you answer a call. This practice allows you to obtain the necessary information and to appraise each situation properly. Each call will have its own unique circumstances, but the basics of information processing will always apply. You cannot assess a call properly without first obtaining the appropriate details. This can be achieved by following the basic principles of the call assessment model.

### Call Assessment Model

There are differing schools of thought around what questions should be asked by a call taker. One method is to start with the four Ws and one H. They are: *What?*, *When?*, *Where?*, *Who?*, and *How?* The questions that are asked and the order in which they are asked depends entirely on the call. The application of these questions must become second nature if you are to be an effective and efficient call taker.

#### *What*

It is important to know the nature of the call in order to assess it properly for priority and to determine what resources are necessary. *What* is needed? This information should be apparent in the first few moments of most calls by asking the callers, “How can we help you?”

The call taker will quickly determine (by using caller interview techniques) what is needed. The call taker will gather information they need to provide service to the caller. The call taker will then assign a file to the caller (as appropriate) to ensure that the appropriate response is tracked from inception to follow-up.

- What is needed?
- What resources are you seeking?



### ***When***

It is important to establish when the caller needs the information or service. For example, if a caller tells you “I want to register for a course,” you might assume that the course is coming up soon. You could be wrong, however. *Ask* the caller. It is possible that the caller wants a course next semester and is merely making a preliminary inquiry about how to go through the process.

- When do you want this to happen? Now? Later?
- When are you planning to use this service?
- When would you like to start?

### ***Where***

The call taker will determine the necessary location of the event. The call taker will also ascertain how the caller can be contacted with further information concerning their request.

- Where do you want to access the service?
- Where do we contact you? Now? Later?

### ***Who***

The call taker will ask for the name of the caller when registering any information for further follow-up.

- Who are you?
- How do I spell that?

Personal information is gathered under the ‘*who*’ category. This information may include:

- Address and other contact information.
- Application information necessary for processing.

### ***How***

The caller taker will determine how the service needs to be provided for each caller in order to deliver it effectively. Asking how the caller wishes to receive information may help you in determining what you need to do next. It also may be used in clarifying what is actually needed by the caller.

- How would you like to receive this information? (offer options such as mail, fax, pick up or ...)

### ***Summary***

Questioning callers according to the call assessment model, if you practice it as a matter of course, will reduce your chances of making a mistake or of

missing information you need. By doing your job to the best of your ability, you increase the service to callers and reduce frustration for everyone.

Obviously, in the examples given above, not every potential question has been listed. More specific details will be covered as we deal with a variety of situations. Each call needs to be treated as a completely unique situation so that it can be assessed properly. However, it should be apparent that there are certain skills and techniques that should be used on each and every call.

Call takers are expected to always perform in a professional manner.



# **TECHNIQUES FOR MINIMIZING ERRORS**

## **Chapter 10: The Importance of Accuracy**

The call taker must be aware of how much both callers and colleagues rely on the information given to them. They take action based on details that you, the call taker, provide. Those details must be as accurate as possible.

Call takers are human and will occasionally make mistakes. However, you can help to ensure that errors are kept to a minimum by doing your job to the best of your ability. Always act in good faith and remember your responsibility to the caller and your agency. Minimizing errors in assessing calls lowers the frustration to callers and to fellow workers.

### **Practical Techniques to Minimize Errors**

Although each call is unique, a number of factors common to different calls can result in the call taker responding incorrectly to a call. Some of the factors originate with the caller, and some with the call taker. Call takers can minimize errors by being aware of the sources of errors and learning to recognize them when they happen.

### **Factors Contributed by Caller**

#### ***Caller Lacks Information***

Sometimes callers are unable to ask clearly for what they want because they lack basic information about what is available. Perhaps the caller's information is secondhand and he or she is acting as a messenger for the actual person who needs a service or information.

This may be the case in asking for course or product information. A caller will say, "I would like to know about ..." or "I want to register for ..." In both these cases, the caller may not be able to tell you the precise nature of the service or information they want. You will have to use your questioning techniques so that you find out what they really want or need.

### ***Caller in an Emergent Situation***

Consider callers who are not sure about the direction of their inquiry although they may know the topic or department. They can ask some questions, but may need more information to help them make further inquiries toward a final decision.

### ***The Call Taker's Ability to Understand the Caller***

The call taker may not understand certain callers because of *cultural* or *linguistic* differences. In a country as diverse as Canada, language barriers pose a significant challenge to effective call taking. The caller may not understand the importance of terms and circumstances referred to by the call taker. Moreover, people from certain cultures may not know how to ask questions that will give them information because they think they may be insulting you or causing you to “lose face”.

Callers may have cultural backgrounds unfamiliar to the call taker. The call taker may not realize the importance of certain terms used by the caller; therefore, *language* can be a significant barrier to the call taker. Many callers do not have full command of the English language, and some may have little or none. Many agencies employ the use of a translation service such as the AT&T Language Line, or keep a resource list of contact people with language skills.

*Age* can be a factor as well. Young children and seniors may present challenges to the call taker in that they may not understand the procedures a call taker has to follow to gather the necessary details. Age may also play a part in the caller's willingness to supply those details. Children may be nervous about making the call even though they may be translating for their parents or other adult, while seniors are often apologetic. Dealing with these types of callers requires the call taker to be patient, and to use conversational control to obtain the necessary information.

There will be times when it is difficult to hear a caller. *Background noise* or the noise level in your own communication centre may affect your ability to understand what the caller is saying.

### ***Influence of Caller's Attitude***

Callers frequently seek immediate solutions or actions to their problems and are often insistent and demanding of the call taker. Some callers will resort to name-dropping to demand immediate action by an agency. Call takers who are not in control of the call may allow the caller to intimidate

them into doing what the caller demands. They either become too anxious to please the caller, or want to disconnect from him or her. The end result is that the correct information is not given or received. Without sufficient details, the call taker cannot respond to a call properly. Lack of information could also result in an inappropriate response from the agency, or one that is contrary to policy.

### ***Caller Is Disabled***

A caller who is disabled may be physically incapable of clear speech during a phone conversation. Certain physical disabilities may prevent the caller from getting a point across or from sounding coherent to the call taker. The caller's emotions may influence their ability to communicate the problem or location accurately. The call taker must be patient and take the time needed to obtain information from the caller. This may include asking the caller to have someone else relay the message if possible.

### ***Caller Is Offensive***

Some callers will be extremely abusive and may use distasteful language. Callers may attack you personally, challenging everything from your ability to do your job to the sound of your voice.

You, as a call taker, may be so offended or intimidated by the caller's language that you will hurry through the call or even disconnect from it. It is best to state clearly that their language is not appropriate and that you can only assist them when the abuse stops. If they continue to be abusive, inform them that you are now hanging up, and then do so. Make a report to your supervisor of the situation and include the caller's number if you have call display.

### ***Caller Is Impaired***

Some callers will be under the influence of alcohol or drugs. This impairment may affect their ability to communicate their needs, offer accurate details, or even form proper words. Such callers can be obnoxious, uncooperative, and demanding. However, never *assume* that a caller who sounds a certain way is actually drunk or stoned, as some physical impairments may sound like inebriation.

## **Factors Contributed by Call Taker**

Call takers are not only hampered by callers' inability to convey information or requests. They can also suffer from problems of their own

that prevent them from doing their jobs effectively. Again, being aware of these potential pitfalls is an important first step towards being able to avoid them completely.

### ***Knowledge***

Experienced call takers can quickly connect an individual request to the appropriate information. They are familiar with types of calls that often originate on certain topics or requests. They use this history as a *guideline* in responding to calls, not as a way of assuming the outcome of a current call. Call takers who lack knowledge specific to their area may not realize what is being asked for.

### ***Inexperience***

Call processing can be stressful, and callers can be demanding. Inexperience in dealing with different types of callers or requests may lead to a caller becoming fatigued. For example, the inexperienced call taker may lack the communication skills needed to gather all the relevant information from some callers. Or, as a result of their inexperience with a particular type of situation, the call taker may be unable to accurately provide what is needed.

Call takers are constantly moving through a variety of calls. An inexperienced call taker may be proficient in dealing with one situation at a time, but may find that dealing with multiple situations or requests will become very stressful. However, as you acquire experience in call processing, you will also increase your ability to control your stress. You are likely to improve as a call taker with every call you handle.

### ***Prejudices***

Prejudice in call taking refers to formulating pre-judgments of callers and situations. In such cases, call takers make assumptions based on previous experiences. Such assumptions affect their ability to make sound judgments based on the current, unique information. Call takers should guard against becoming complacent to the point where they think they have heard it all. Treat all callers as unique individuals and rely on them to provide the answers you need to be able to help them with their unique situation.

### ***Lazy or Hurried Call Taker***

Some calls can be so relaxed that call takers may become complacent in fulfilling their duties. Such complacency is a mistake, even for routine

calls. Lazy call takers will ask just enough questions to get a caller off the line. However, in rushing through a call, they could miss important information that could radically alter a call's effectiveness. Lazy call takers work properly only when *they* are prepared to work.

Call takers may be tempted to hurry through a call when they are not fully prepared to start work. They may have just arrived to work after battling traffic, and may not have had sufficient time to get organized for the shift, when the phone starts ringing immediately. They may hurry through the call with a minimum of details to get time to put their desk in order, log on to the computer, have a coffee, etc.

To avoid some of the problems caused by being hurried, and to give each call the full attention it deserves, give yourself enough time to prepare yourself mentally and prepare your work station with all of the equipment required to do your job efficiently and effectively.

### ***Workload Due to Volume or Situation***

Over the past decade, people in the workplace have had to accomplish more and more with fewer resources. Busy communications centres face the same predicament. There may not be enough people on staff to cover for call takers who are on their breaks, on holiday, or on leave. As a consequence, call takers may find themselves having to deal with telephones that are constantly ringing. They may feel pressure to hurry through calls in order to answer all the lines.

The sheer volume of calls may result in the call taker being unable to answer all incoming calls. Because of expectations from callers, supervisors, dispatcher and field units, the call taker may feel pressured to hurry through a call and not take the time to gather and give the information necessary. The call taker may be tempted to not spend the time necessary to serve the caller. They may feel pressure to get the caller off the line and move on to the next call. Such haste, however, can be counterproductive, resulting in improper service.

Using the call assessment model each time you answer the phone will assist in eliminating this type of problem. Most types of calls can be dealt with adequately in a short time by using the proper questioning techniques.





## Chapter 11: Call Processing Techniques – Preparing Reports

### Reports for Processing

The call taker is responsible to ensure that the information gathered is **complete, concise, clear, and correct (The four Cs)**. Call takers need to evaluate the reports they generate. A report must be self-explanatory since it is often directed to a person removed from the source of the call. The recipient depends on the thoroughness and accuracy of the report to obtain the facts. If any part of the communication requires further explanation, the report has failed to serve its purpose. In evaluating the report, the following questions should be asked:

#### *Complete*

- Does it contain all the information necessary to accomplish its purpose?
- Does it answer all the questions the reader may have?
- Does it answer the appropriate questions *where, when, who, what, why, and?* (as required by the agency)

The report must incorporate all the available facts and information that pertain to the call. Partially-stated facts should not be incorporated in a report as they are misleading and may cause the reader to reach wrong conclusions and make wrong decisions.

#### *Concise*

A concise report states as much information as possible in as few succinct words as possible. Eliminating superfluous words and phrases that contribute to the wordiness of a report will save the readers time and unnecessary work.

#### *Clear*

The first objective of any written communication is to convey ideas so that they cannot be misunderstood. The selection of words will influence the effectiveness of the report. The words used should be simple and not ambiguous. A barrier to quick understanding is the unnecessary use of complex or unusual words.

#### *Correct*

Reports must be factual. Errors reflect upon the ability and, at times, the integrity of the writer. The content must consist of a true representation of the facts.

#### *Summary*

The information in a report depends upon the purpose of the report. The purpose of the report is to inform the recipient/reader of certain activities

and the outcome of these activities. Therefore, in processing a call, a call taker should always bear in mind that the primary purpose for processing the incident is to inform.

It is not enough to ask the right question; the call taker must accurately record and quickly process the information. In preparing the narrative account of the call, the call taker cannot assume that the recipient will have any knowledge of the call. The call taker cannot expect the recipient of the information to fill in any details. He/she must assume that the recipient's only information about the incident will come from the report generated. Reports that demonstrate the four Cs reflect the ability and the attitude of the call taker and the efficiency of the communication centre. The following steps will help to ensure accuracy.

- Document the call manually or electronically.
- Relate the circumstances of a call to the appropriate department via the written report.
- Ensure that the information you gather is **complete, concise, clear, and correct**.

## **Practice Techniques of Call Processing**

Develop a style and level of expertise in a variety of call taking techniques.

Be flexible in their usage and realize that a technique that works on one caller may not work on another.

Practice your communication skills and be open-minded to new approaches. Each call and each caller present a new challenge to you. Never believe you know it all.

## **Be Proficient in Multi-Tasking**

Learn to quickly gather enough information to determine the priority of incoming calls in order to facilitate an appropriate response to calls and to pass them on if this is appropriate.

Keep detailed notes of your calls. It is impossible to memorize all the information you receive.

You may need to be effective in handling more than one call at a time. Your skill involves being able to keep track of several calls at once, never forgetting the nature of each one and managing them in an appropriate manner.

Use your common sense to determine how to approach a variety of calls. If your lines are ringing, it is necessary to have a way of prioritizing calls.

All of these techniques are part of efficient call taking and report processing. Practise them until they are second nature.