

## TELEPHONE ANSWERING/GREETING CLIENTS POLICY AND PROCEDURE

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## **1 This policy and procedure arises from**

The Adoption Support Agencies (England) and Adoption Agencies (Miscellaneous Amendments)

- Regulations 2005 (regulations 13, 20)

and the National Minimum Standards for Adoption

- Standard 24

## **2 Introduction**

2.1 The aim of this policy and procedure is to ensure that PAC responds to service users' telephone queries and visits in a prompt, courteous and helpful manner.

## **3 Answering Telephone Calls to the Office Phone Number**

3.1 Calls made to the office telephone number will be answered between the normal office hours of 9am – 5pm, with the exception of Wednesdays and Thursdays, when calls will be answered between 9am – 7.30pm. Outside these times the answering facility on phone number 202 will be switched on with a message detailing the office opening times and the Advice Line telephone number and opening times. It is the responsibility of the person in the Support team who is "first in line" to answer the telephone that morning to switch off the answering machine facility (for instructions see the message on the phone itself) and check the answering machine messages at 9am each morning and to take appropriate action. (However, if that person is delayed, another member of the Support team should listen to the messages, switch off the answering machine, and take any action necessary). In the evenings, the Support team should ensure that the answering machine is switched on at 5pm (7.30pm on Wednesdays/Thursdays). The last person in the Support team leaving the office should double-check that this has been done.

3.2 When whole staff training or staff meetings are taking place during normal office hours, the answering machine message will be changed appropriately and callers invited to leave a message. It is the responsibility of the person in the Support team who is "first in line" to answer the telephone that day to check the answering machine messages following the end of the whole staff training or staff meeting.

3.3 Whenever possible, calls should be answered within two rings.

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1. Calls should be answered in the following manner:

“Good morning/afternoon, PAC, ..... (name of person answering call) speaking”.  
Ask the person’s name. If you are not sure of the name after they respond, ask them to spell it for you.

2. If the caller asks to speak to a specific person within the organisation, do not automatically transfer the call;
  - a. Say ‘could you please let me know what your call is about?’ and ‘is this relating to an existing case?’
  - b. If it becomes evident from their answer that the matter is not about existing clients, put the call through to the Advice Line or give them the Advice Line phone number if the Advice Line is busy
3. If 2b) does not apply, put the caller on hold and dial the extension number of the person they have asked to speak to
4. Tell the member of staff the name of the caller and what the call is about
5. If the member of staff is unable to or does not wish to take the call, (or is absent from the office) go back to the caller and ask if they would like to leave a message.
6. Make sure you ask for the person’s telephone number (preferably their landline), and if appropriate, their email address. The caller’s telephone number should be noted, even in cases where the caller states that the person knows their telephone number. Email the message to the person concerned and leave a message on their desk if they are in the office that day, stating the date the message was taken, time of the call, and your name.

3.4 If the caller asks for Peter Sandiford by name or the Chief Executive or Director, it is essential to follow the process above before transferring the call. If he is not in the office, transfer the caller to the Head of Support Services/PA to CEO, if she is available. If neither person is available, email the message to the Chief Executive, or the Head of Support Services/PA to the CEO in his absence.

3.5 If the caller wants to leave a message for a person who is not office based, or who only comes into the office once a week or every two weeks, it may be necessary to email the message to their home address and/or call them at home or on their mobile (if the message is urgent).

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- 3.6 Under no circumstances should anyone answering the telephone give out personal numbers or personal email addresses of members of staff, freelance workers, volunteers, members of the Board of Trustees or consultants (with one exception – see 3.10). The Staff List is a confidential document which should be kept inside people's drawers and not be left on desks or pinned to walls.
- 3.7 The one exception to 3.9 is Dr Nick Banks, whose permission we have to issue his email address and mobile telephone number to members of the public who wish to contact him.
- 3.8 If it becomes evident that the call is for the Advice Line, do not try to answer the caller's query yourself: this is the job of the trained Advice Line counsellor. Respond in the following manner:
- 3.9 If it is during Advice Line hours:  
Ask the person's name. If you are not sure of the name after they respond, ask them to spell it for you.

Transfer the call to the Advice Line counsellor, first advising them of the person's name (and organisation, if it is a call from a professional).

If the Advice Line is busy, ask the caller to ring back, and give them the Advice Line direct number. Tell the caller what the Advice Line hours are, so that they do not call again once the line has closed.

- 3.10 If it is outside Advice Line hours: explain to the caller what the Advice Line hours are, and give them the direct line for the Advice Line, unless the caller is:
- a professional from a Local Authority (subscribing **or** non-subscribing). Attempt to find an Advice Line worker, or, in their absence, transfer the call to the Deputy CEO or the CEO.
  - is evidently highly distressed. Again, attempt to find an Advice Line Worker or, in their absence, another counsellor, or transfer the call to the Deputy CEO or CEO.

If clients are discourteous over the phone, remember that it is our duty to remain polite and patient at all times. Clients may be in a distressed state, which can result in verbal aggressiveness. If you find you are unable to deal with an unpleasant caller, please transfer the call to the Deputy CEO or the CEO.

## 4 Comments, Compliment and Complaints

If it becomes evident that the caller is ringing to make a comment or compliment, please offer to send them PAC's Comments, Compliments and Complaints leaflet and encourage them to complete it. If they do not wish to do this, pass the call to the Head of Support Services/PA to CEO (who is responsible for logging comments or compliments), and if she is not available, to another manager.

If it becomes evident that the caller is ringing to make a **complaint**:

Support team staff should not deal with the complaint themselves.

Interrupt the caller politely and ask if they wish to speak to the counsellor directly (if the complaint involves a counsellor) or to the worker's line manager (if it involves a person working for the agency).

In the event of neither of the above being available, pass the call to one of the management team.

Please refer to Section 9 "Complaints and Representations" of the Overarching Policies and Procedures for further information.

## 5 Greeting visitors

- 5.1 When a visitor rings the door bell (comes up as 239 on your phone and has slightly different ring tone to the phone), answer the door by saying "Good morning/afternoon, PAC" – not just "hello".
- 5.2 Ask the person's name and the name of the staff member they are visiting (if they do not provide this information) and press 55 on your telephone to let them in, at the same time asking them **to take a seat in the waiting area downstairs and telling them you will be down straightaway**. This is to avoid clients wandering upstairs in error. Check the Room Booking Calendar to make sure the appointment is recorded there and to check which room the client is being seen in.
- 5.3 Let the counsellor know that their client has arrived, or ask a colleague to do so: please make sure this is done as quickly as possible in order to avoid keeping the client waiting too long in the waiting area.
- 5.4 **Always go downstairs; even if they are regular visitors, they should always receive a welcome.** Please greet visitors with a smile, offer to take their coats and show them into the appropriate counselling room.

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- 5.5 Offer them to make them a drink and show them where the toilet is. Please ensure that clients arriving at the same time for separate counselling sessions do not gather in the kitchenette area.
- 5.6 If the counsellor is off-site and has not arrived by the start time of the client's appointment, call the counsellor on their mobile to establish how long they are going to be. Advise the client and offer apologies for keeping them waiting.
- 5.7 If a visitor arrives very early and the counselling room is occupied, offer them the option of waiting in the waiting area or coming back a little later.

Visitors should not normally be invited upstairs to the office unless

- they are trustees or consultants
- they are visiting a member of staff and he/she wishes to see them in an office (but always check first)