

SOP: Telephone Answering and Call Transfer Guidelines

This SOP details **telephone answering and call transfer guidelines**, including proper greeting protocols, call screening procedures, handling difficult callers, accurate message taking, and efficient call transferring techniques. The goal is to ensure professional and courteous communication, improve customer service, and maintain seamless internal and external call management within the organization.

1. Purpose

To establish standard practices for answering and transferring telephone calls, ensuring efficient, professional, and courteous service.

2. Scope

This SOP applies to all personnel responsible for answering and transferring telephone calls within the organization.

3. Responsibilities

- All staff must adhere to these guidelines when handling calls.
- Supervisors are responsible for ensuring compliance within their teams.

4. Procedures

4.1 Telephone Answering Protocol

- Answer all calls within three rings whenever possible.
- Use a friendly and professional tone.
- Standard greeting: "Good [morning/afternoon], [Organization/Department], this is [Your Name], how may I help you?"
- Listen attentively to the caller's request.

4.2 Call Screening Procedures

- Determine the purpose of the call before transferring.
- If unsure, clarify using polite questions, e.g., "May I ask what this is regarding?"
- Document essential information, such as caller's name, company, and reason for calling.

4.3 Handling Difficult Callers

- Remain calm and composed at all times.
- Listen without interrupting and acknowledge the caller's feelings.
- If escalation is necessary, transfer to a supervisor or manager following escalation protocols.
- Use phrases such as, "I understand your concern, let me see how I can assist."

4.4 Accurate Message Taking

- Clearly document the caller's name, phone number, time of call, and detailed message.
- Repeat the message back to the caller to ensure accuracy.
- Deliver the message promptly to the intended recipient using approved channels (email, message pad, etc.).

4.5 Call Transfer Techniques

- Inform the caller why and to whom the call is being transferred.
- Ask for permission: "May I place you on hold while I transfer your call?"
- Use the correct transfer procedure (warm or cold transfer as appropriate).
- Announce the caller and reason for the call to the recipient before completing the transfer, if possible (warm transfer).
- If the recipient is unavailable, return to the caller with options (e.g., leave a message, hold, or call back later).

5. Call Handling Flowchart

Step	Action
1	Answer call promptly using standard greeting
2	Identify caller's needs
3	Determine if call can be handled or needs to be transferred
4A	If handling, provide service and end call professionally
4B	If transferring, follow transfer protocol
5	If unable to transfer or resolve, take and deliver an accurate message

6. Review and Training

- All staff are required to review this SOP upon hiring and during annual training.
- Regular call monitoring and feedback will be conducted to ensure compliance and identify training needs.

7. Revision History

Date	Version	Description	Approved By
2024-06-10	1.0	Initial release	Operations Manager