



The White Shirt and Business Systems

System Example 2

more money for shoes

System Example 2

Process: Answering the Telephone and transferring a call

Result: To ensure consistency and a great first impression for everyone who calls the office

Person with overall responsibility: Receptionists and all Team members answering the phone

Step	Task
1	Smile before picking up the phone
2	Answer the phone within three rings
3	Answer saying: "Accounting & Taxation Advantage, this is (insert your name)"
4	If the call is for a member of the team, always ask for the caller's name and where they are calling from. Do not ask what it is regarding and then place the caller on hold
5	If the team member is unavailable, inform the caller and ask for an appropriate time to return the call. Let the caller know that the team member will call them back at that time.
6	Email the team member informing of the call as well as the time that the call is to be returned
7	If the team member is in the office and not in block-out, with a client or in a meeting, then the suggested script is "I'll just place you on hold and let (insert team member's name) know that you are waiting for them."
8	Dial the relevant team member, inform them of the caller, where they are calling from and what line they are holding on

Service Standards

1	Phone to be picked up within three rings
2	Phone appointments made for all return calls (best date and time to avoid phone tag)
3	All phone calls to be returned the same day or the client informed of the first appropriate time the following day