**Procedure: How to Answer the Phone**

**Purpose**

This procedure establishes consistent phone etiquette and call-handling techniques to ensure professional and efficient communication.

**Step 1: Answering the Phone**

✔ **Pick up a call using one of the following methods:**

* **Handset:** Lift the receiver to automatically answer.
* **Speakerphone:** Press the button directly under the green **“Answer”** button.
	+ You can pick up the receiver at any time to switch to handheld mode.

✔ **Use the scripted greeting:**
📞 **“TPC Reveal Graphics, this is \_\_\_\_\_\_\_\_; how can I help you?”**

✔ **Follow call documentation procedures:**

* Refer to **“How to Document a Phone Call”** for proper call recording guidelines.
* If there is anything worth noting during your call, send a follow up email to the customer for a written record. (e.g. Did the client approve a quote or proof? Did they place an order?)

**Step 2: Placing a Call on Hold**

✔ **To place a call on hold:**

1. Press the **black button** under the blue **“Hold”** box on the screen (second button from the left).

✔ **To resume a call:**

1. Press the same black button.
2. The blue box should change to **“Resume”** when the call is active again.

**Step 3: Transferring a Call**

✔ **To transfer a call:**

1. Press the **black button** under the blue **“Transfer”** box (first button from the left, where the “Answer” button was).
2. Dial the **extension number** to transfer the call.
3. Press the **“Transfer”** button again to complete the transfer.

📌 **Alternative Method:**

* Use the **extension buttons** on both sides of the phone.
* Press **“Transfer”** a second time to send the call through.

**Step 4: Ending a Call**

✔ **Before ending the call, thank the caller:**
📞 **“Thank you for calling, have a great day!”**

✔ **To end the call:**

* Press the **black button** under the red **“End Call”** box.
* OR place the receiver back on the phone system.