

## Target 18 – A Checklist of Eighteen Tips to Better Telephone Communications for Mediators by Anju D. Jessani, MBA, APM

In the fall 2008 issue of Mediation News, I provided tips to better email communications for mediators and others. If email communications are challenging, then the telephone conversation, which is often impromptu and rushed, has even more challenges.

Albert Mehrabian, Professor Emeritus of Psychology, UCLA states: “Seven percent of meaning is in the words that are spoken, 38% of meaning is paralinguistic (the way that the words are said), and 55% of meaning is in facial expression.”

Acknowledging that telephone communications without visual reference appear not to be disappearing anytime soon, I have attempted to provide a checklist for telephone communications – seven for outgoing calls and six for incoming calls, two for dealing specifically with divorcing clients, and three for all phone calls.

### Outgoing Phone Calls

**1. Know Purpose of Call:** Before you call, you should have a clear purpose for the reason for the call, the information you need to provide in front of you, what you are planning to say, and what you hope will be the outcome of the call. Know in advance the call back phone number your are going to give, your fax number, email information and other details that may be requested of you during the phone call. Prepare a list of questions or bullet points you need to cover in the phone call.

**2. Schedule Phone Calls:** If appropriate, email the recipient in advance for permission to call, the reason for your call, with an approximate idea of how much time you will need for the call. Unscheduled phone calls of more than a couple of minutes are bound to

interfere with the recipient’s schedule, unless you are calling customer service.

**3. Be Aware of Time & Place:** When possible, make outgoing phone calls from a time and place where you can talk comfortably, and can take notes. A sporting event or rock concert is not the best place to be placing a phone call, unless the call is of an urgent nature. You should also try to call at a time convenient to the recipient; calling at the end of the day when people are short-staffed or in a rush to leave the office, is usually not productive.

**4. Identify Yourself & Reason for Your Call:** Give your name, business affiliation and reason for your call to whoever answers the phone, and please spell your name slowly, not getting annoyed if you are asked to repeat the information. If you were referred, let the person on the phone know that as well. Think about the telemarketers and collection agents who call with just their first name; you have nothing to hide. At the same time, be succinct.

**5. Ask Permission for the Call:** Ensure that you have reached the recipient at a good time. If you only need five minutes let them know that. Is the person in a place where they are able to speak comfortably, or is there a better time for you to reach them. Even though you might feel your matter is urgent, they are going to be more receptive to your phone call when they are in a comfortable position to speak to you and spend the time with you that you require to address your concerns.

**6. Treat Gatekeepers with Respect:** When calling someone with a secretary or administrative assistant, be patient and polite, and obtain his/her name. If appropriate, provide the reason for your call. The secretary/assistant can be your ally in getting to talk with the target, or your adversary in screening out your call

**7. Leave a Coherent Message on Voicemail:** Speak slowly and clearly, and if appropriate, leave a brief reason for the call. Repeating your phone number twice can be helpful, and if you have a name that is not “John Smith” – spelling your name can be helpful. Don’t you hate those messages that are long and then the person zips so fast through his/her phone number that you have to replay the message a number of times? FYI, the easiest way to ensure that there is no confusion regarding your callback number, is to make the phone call from the number you want a callback to if the phone has caller identification.

### Incoming Phone Calls

**1. Answer Call in a Timely Manner:** Believe it or not, customer service organizations do keep track on how long the phone rings before the call is answered. You should do the same, especially if your phone is answered by a service or someone else. Phone your office from a non-identifiable number occasionally; it will not only allow you to experience what a client might, but will also keep your administrative staff on their toes.

**2. Identify Yourself & Firm:** In the pet peeves area, I do not want

*(Continued on page 21)*

## Telephone Tips for Mediators, Continued

(Continued from page 20)

to know what number I have reached, I want to know the name of the firm and the person I have reached. Additionally, ask how you might be able to assist the caller. If you have a secretary or assistant, have someone else call the office to check to see how the phone is answered. You may be losing business in the first 30 seconds of an incoming call from a potential client if the phone is answered inadequately.

**3. Ask Permission to Callback:** It is better to answer your phone when you are in a position to speak, but we do not always have that luxury. Getting information about the reason for the call and the time the person needs, will allow you to have a conversation at a time convenient to you and the caller. The caller cannot possibly know your other commitments. Therefore, letting them know that their call is important and that you would like to call them back at a mutually convenient time where you can allocate the appropriate time is better than rushing them off the phone.

**4. Callback in a Timely Manner:** If you cannot take the call, return the call in a timely manner. If the call is truly of an urgent nature, let the person know that you are not in a position to speak right now, but will call them back at a specified time. In business, the expectation is that most calls should be returned within one business day.

**5. Let Caller Know Out-of-Office Status:** As with email, if you are on vacation or in a situation where you and will not be able to return calls immediately, let the caller know that via your assistant, secretary or answering machine or service. You might also let them know who else might be able to address their concern during your absence.

**6. Go Easy on Holding:** If you are expecting a call, let the caller know that and ask if you receive the other call, would they prefer they but put on hold or be called back, and get a callback phone number in advance. Otherwise, ignore the call-waiting signal; better to call the other caller back once you are off this phone. If you do have to put someone on hold, time, explain that briefly and ask for permission to do so. Try not to forget the person is on hold!

### Divorcing Clients

**1. Practice Discretion When Calling the Home Phone:** If you are calling on a divorce matter and the wife has contacted you, be very careful when the husband answers (or visa versa). Leave just your name and phone number. The same applies to leaving messages on voicemail.

**2. Let the Parties Call You First:** The husband calls you to inquire about divorce mediation, and at the end of the conversation, he gives you his wife's phone number and asks you to call her. Do not fall into the trap. You might be the one breaking the bad news to her that he wants a divorce if you call. Ask the husband to give your contact information to the wife so that she may contact you.

### Incoming and Outgoing Phone Calls – During the Call

**1. Speak Clearly with Pauses:** Overcoming the barrier of facial expression, attempt to speak clearly and calmly in your conversation so that your intentions are not misconstrued. Allow pauses that will in turn give the other person permission to speak. If you are happy, say that; if you upset, say that as well (courteously). We rely

on visual cues for many human emotions, and one cannot assume that the person will be able to notice these emotions from the tone of our voice alone.

**2. Be Polite at All Times:** How you speak is a reflection of your firm. If it is hard to do this, try to imagine that the phone call is being recorded and could be on the Internet. Be especially careful in leaving a message on an answering machine or service (e.g. Alex Baldwin's snafu); this is a permanent recording, and you have no control of the distribution of your message.

**3. Take Notes and Summarize:** We tend to try and multitask while we are on the phone, reading emails or even washing dishes! Instead, take notes while you are on the call. It will help you listen and focus on the speaker. At the end of the call, summarize the conversation and the next steps. Make sure the reason for your call was accomplished.

### Tallying your Results

So, how did you do with the checklist? We all make mistakes. Nevertheless, being more mindful about telephone communications will definitely prevent disasters and help your professional reputation. If you have any tips or pet peeves on the subject, please email me, and I will include them as an addendum to this article in the next issue of Mediation News.

Anju D. Jessani is a past president of NJAPM, having served as President from 2005-2007. She has mediation offices in Hoboken and Clinton, New Jersey, and is instructor in NJAPM and ICLE's 40-hour divorce mediation training classes. Anju can be reached at (201) 217-1090 or [ajessani@dwdmediation.com](mailto:ajessani@dwdmediation.com)