

Transferring Telephone Callers Professionally

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Have you called an organization on the telephone and asked to speak to someone only to be routed around what it seems like the entire organization? If you have experienced this endless stream of transfers and frustration, you probably realize that the way that your patient or client call transfers are handled sends a powerful message about your professionalism and the level of service in your office.

In order to effectively transfer callers or put them on hold, you must first be proficient at using your telephone equipment. Hopefully, you received adequate and correct training on all the features of the telephone and got a chance to practice using them before you took your first patient or client call. Make sure that you understand how the telephone transfer (sometimes called the *link*) and hold functions work before a call comes in. Do not practice on your patients. Nothing is more frustrating or irritating for callers than to be shuffled from one person to the next or to be placed on what seems to be an endless hold.

Here are some suggestions that can help to increase your effectiveness when transferring callers or putting them on hold:

Always request permission before transferring a caller. This shows respect for the caller and psychologically gives them a feeling of control over the conversation. You can also offer options. For example, you might give the caller an option to either allow to transfer the call or let you take a message. This is especially helpful when the patient or client is already irritated or has a problem.

Before transferring the call, explain why you need to do so. You might say, "The person who handles billing questions is Shandra Philips at extension 4739. May I transfer you, or would you rather I take a message and pass it along to her?" This saves you and the caller time and effort, and you have provided professional, courteous service. If the caller says, "Yes, please transfer me," follow by saying something like, "I'd be happy to connect you. Again, if you are accidentally disconnected, I'll be calling Shandra Philips at extension 4739." By doing this, you allow them to call back, if necessary, and ask for that extension directly. This frees up your time having to talk to the patient a second time.

Announce all calls. Once you have successfully reached the intended person, announce the call by saying, "Shandra, this is (your name), from (your department). I have (Mr. patient's/client's name) on the phone. She has a (question/problem about ____). Are you the right person to handle that?" If Shandra answers yes, connect the caller and announce, "(Mr. patient's/client's name), I have Shandra Philips on the line. She will be happy to assist you. Thanks for calling (or some similar positive disconnect phrase)." You can then hang up, knowing that you did your part in delivering quality customer service.

If the call taker (Shandra) is not available or is not the appropriate person, reconnect with the patient or client and explain the situation. Then offer to take a message rather than trying to transfer to different people while keeping the person on hold further. You would make an exception if the call taker informed you of the appropriate person to whom you should transfer, or if the patient insisted on staying on the line while you tried to transfer to the right person.

Avoid making a blind transfer. This practice is ineffective, rude, and not patient-focused. A blind transfer happens when a service provider asks a caller, “May I transfer you to _____?” or may even say, without permission, “Let me transfer you to _____.” Once the intended transfer party answers, the person transferring the call hangs up without telling the recipient what is going on or who is calling. As mentioned above, always announce your caller by waiting for the phone to be picked up and saying, “This is (your name) in (your department). I have (Mr. patient’s/client’s name) on the line. Can you take the call?” Failure to do this could result in a confrontation between the two people. If the calling patient/client is already upset, you have just set up a situation that could lead to a lost patient or potential patient and/or angry coworker.

Successfully transferring callers is not difficult, if you just take the time to prepare and think from a customer-focused perspective.

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