



Business Telephoning in Practice

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TABLE OF CONTENTS:

Using Standard Telephone Phrases.....	5
When Someone is Unavailable	14
Taking Telephone Messages.....	18
Passing on Messages to Clients	29
Asking and Confirming Information	38
Checking Back and Confirming Information	47
Enquiries and Requests.....	57
Requesting Information.....	65
Dealing with Persistent Callers	72
Giving Bad News: Making a Cancellation	80
Buying Time	87
Chasing up Payment on the Phone.....	93
Placing, Changing and Cancelling Orders	99
Finalizing Agreements	108
Reporting Back	115
Cold Calls – Arranging a Meeting.....	121
Telephone Sales Techniques	129
Customer Service on the Phone.....	135
Handling Customer Complaints.....	137
Handling Difficult Requests.....	147
Telephone Communication Problems Part 1 (a Bad Line).....	152
Telephone Communication Problems Part 2 (an Unclear Message).....	158
Teleconferencing: Communication Problems.....	164
Internal vs External Calls.....	173
Controlling Techniques	175

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Using Standard Telephone Phrases

Introduction

Here we are going to look at making business calls in English and go over some of the key phrases for speaking on the phone. Read through the two short phone calls below, then read our comments on the dialogues. You'll be able to practice some of the key phrases later.

Dialogue 1

- Tammy: Wilson and Wilson. Can I help you?*
- Joe: Yes, this is Joe Chan from Acme Appliances. I'd like to speak to Mr Wilson if he's available, please?*
- Tammy: Would that be Mr Wilson senior or Mr Wilson junior?*
- Joe: Mr Wilson senior..*
- Tammy: I'll just see if he's available - hold the line please. (slight pause.....)
I'm sorry, Mr Wilson's in a meeting at the moment. Can I take a message?*
- Joe: Yes, could you ask him to phone me please? My number's 2311 5654.*
- Tammy: I'm sorry, I didn't catch your name.*
- Joe: I'm sorry, Joe Chan, Acme Appliances.*
- Tammy: OK. Just let me check the number, 2311 5654.*
- Joe: That's right.*
- Tammy: I'll pass that message on. Thank you. Goodbye.*
- Joe: Bye.*

Dialogue 2

- Joe: Acme Appliances, Joe Chan speaking.*
- Wilson: This is Tom Wilson returning your call.*
- Joe: Ah yes, Mr Wilson. Thanks for calling back. I wanted to set up a meeting with you to discuss your requirements for next year.*
- Wilson: Yes certainly. How about Thursday about two-thirty.*



Joe: *That would be fine.*

Wilson: *Okay, I look forward to seeing you then.*

Joe: *Thursday, 2.30. See you then. Goodbye.*

Wilson: *Goodbye.*

Notes

When we use the phone we can't see the other person, so we have to listen carefully and speak clearly. Often we deal with a receptionist or personal assistant, but the language we use on the phone follows conventions.

Tammy: *Wilson & Wilson. Can I help you?*

Joe: *Yes, this is Joe Chan from Acme Appliances. I'd like to speak to Mr Wilson if he's available, please?*

When answering the phone, a switchboard operator will usually say the name of the company, then 'Can I help you?' or 'How can I help you?'

Or they may not say anything after the name of the company. In any case, the caller normally says their name, by saying 'this is' and their name, then the name of their company after the words 'from' or 'of', and then who they would like to speak to.

Don't wait to be asked, but offer the information. On the phone, unless you know the other party personally, always use polite, formal language.

Mr Wilson might not want to speak to Joe - but it's not polite to say this. Notice that Joe says he wants to speak to Mr Wilson 'if he's available'.

Often it's not convenient to speak to someone straight away. 'If he's available' really means, 'If he wants to speak to me at the moment.'

Here are some useful phrases for asking for someone on the phone:

Is Mr Wilson available, please?
Could I speak to Mr Wilson if he's available?
Could you put me through to Mr Wilson?
I'd like to speak to Mr Wilson if possible, please.

So we can say:

I'd like to speak to Mr Wilson

Or

Could I speak to Mr Wilson?

And: 'If he's available' or 'if possible'.



And you always add 'please'.

Another phrase is:

Could you put me through, please?

The receptionist says: 'I'll just see if he's available', then 'hold the line please'.

But Mr Wilson isn't available, so this is what she says:

I'm sorry, Mr Wilson's in a meeting at the moment. Can I take a message?

'In a meeting' is code for it's not convenient for him to talk at the moment'. He may be in a meeting, but he could also be out, or doing something else.

Here are some phrases to practice, that can be used for this situation.

I'm sorry, he's in a meeting at the moment.

I'm sorry, he's not available at present.

I'm sorry, he's out of the office at the moment.

And here's one not to use.

I'm sorry, he's busy.

To say someone can't talk because they're busy, suggests that your call is not important. But the receptionist knows what to say, and to ask if there's a message.

Tammy: Can I take a message?

Joe: Yes, could you ask him to phone me, please. My number's 2311 5654.

It's best to keep messages simple and to the point.

Here are a few simple phrases to use when leaving a message. Let's practice.

Could you ask him to phone me, please?

Could you get him to return my call, please?

If he could call me back, that would be great.

Of course the important detail here is the actual phone number. It's important to pronounce each number carefully.

Two three, double one, five six five four.

In US English they would probably say:

Two three one one, five six five four.

And the receptionist must also make sure she has all the details correct.

Here are some phrases you can use to check details.

I'm sorry, I didn't catch your name.

Could you just repeat the number, please?

Could I have your number again, please?

Would you mind repeating that?



When Tom Wilson returns his call, Joe answers like this...

- Joe: *Ah yes, Mr Wilson. Thanks for calling back. I wanted to set up a meeting with you to discuss your requirements for next year.*
- Wilson: *Yes certainly. How about Thursday about two-thirty?*
- Joe: *That would be fine.*
- Wilson: *Okay, I look forward to seeing you then.*
- Joe: *Thursday, 2.30. See you then. Goodbye.*
- Wilson: *Goodbye*

First Joe thanks him for calling back. He says 'Thanks for calling back'. He could also say, 'Thank you for returning my call.' Then he states the purpose of her call, and they make the arrangements for the meeting. Because he wants the meeting, he Let's Wilson suggest a time. This is polite, because he is the customer in this situation. Then he says 'I look forward to seeing you then.'

Again, this is a polite way of ending a conversation - as well as being a signal that there is no more to say.

Notice too, that Joe repeats the day and time of the meeting so that both people are sure of it.

Let's now just review the key phrases for phone calls when calling someone, and making an arrangement.

- Wilson & Wilson. Can I help you?*
I'll just see if he's available.
Would you mind holding the line?
Would you like to leave a message?
Sorry, I didn't quite catch your name.
I'd like to speak to Mr Wilson
Could you put me through to Mr Wilson?
This is Lin Chan returning your call.
Thanks for returning my call.
I look forward to seeing you then.

The key points when using the phone are to speak clearly and give essential information. Don't speak too fast, and check that the other person has understood. If not, you may need to rephrase. Use polite, formal language - these conventional phrases are signals for the other person. We need to respond in the right way, or the conversation could be quite short.

Additional Sample Dialogues

Dialogue Transcript 1

- Lynn : *Good morning. Osay Shipping Corporation. This is Lynn. How may I help you?*
- Caller : *Hi, could I please speak to Benjamin Wong, please?*



- Lynn : *Just a moment, sir. I will check and see if he's available. Could I please have your name?*
- Caller : *It's Martin Brown. (pause....)*
- Lynn : *Well, it looks like Mr Wong is out of the office right now. Can I take your number and get him to call you back later?*
- Caller : *OK, sure. It's 5678 4955.*
- Lynn : *Right. That's 5678 4955?*
- Caller : *Yes, that's right.*
- Lynn : *Thanks very much. I will pass your message on to Mr Wong as soon as possible. Have a great day.*

Dialogue 2 Transcript

- Lynn : *Good morning. Osay Shipping Corporation. This is Lynn. How may I help you?*
- Caller : *Yes, could you put me through to Anita Hill on extension 346?*
- Lynn : *Certainly, sir. I'm connecting you now. (pause....)*
- Anita : *Finance Department. Anita Hill speaking.*
- Caller : *Hi, Anita. This is Philip Zhang. I'm calling about our meeting time next week.*
- Anita : *Oh, hi, Philip! Yes, I'm glad you called because I'm planning my schedule for Tuesday. I was hoping that you'd be able to make 10.30 a.m.*
- Caller : *I'm afraid Tuesday doesn't suit me. Are you available on Wednesday morning at 10.30?*
- Anita : *Wednesday morning at 10.30? Let me see....yes, I'm free.*
- Caller : *That's great. Would you like to come up to our office or should we meet at the warehouse?*
- Anita : *No, I think meeting at your office would be a easier as I have an appointment in that area in the afternoon.*
- Caller : *OK. So I expect to see you here on Wednesday at 10.30. Let me give you my mobile number just in case you're running late or there's any change to our meeting time. Do you have a pen handy?*
- Anita : *Yes, go ahead, Philip.*
- Caller : *It's 095702335.*
- Anita : *095702335.*



Caller : Yes, that's right. I'll see you on Wednesday, then.

Dialogue Transcript 2

Lynn : Good morning. Osay Shipping Corporation. This is Lynn speaking. How may I help you?

Caller : Yes, good morning. I was wondering if I could speak to Albert Lo, please?

Lynn : Just a moment; I'll see if he's at his desk. Can I ask your name, sir?

Caller : Yes, it's Justin Mortensen.

Lynn : Sorry, sir. Could you spell your family name for me, please?

Caller : Certainly. It's M-O-R-T-E-N-S-E-N.

Lynn : OK....I'm ringing Mr Lo now, sir. (pause....)

Lynn : I'm terribly sorry, but it seems as if Mr Lo is in a meeting right now.

Caller : Mmmm...do you have any idea of when he'll be free?

Lynn : He should be available after 2 o'clock. Would you like me to take a message?

Caller : Yes, I would. Could you give him my Singapore number? I'll be here until tomorrow afternoon and I'd really like him to call me as soon as possible about the Customs clearance for our goods.

Lynn : OK. And what's that number, sir?

Caller : Oh, yes. It's (456) 2245 2546 extension 515.

Lynn : Let me just repeat that. It's (456) 2245 2546 extension 515. And it's about the Customs clearance for your goods.

Caller : That's right.

Lynn : OK. I will pass on the message to Mr Lo as soon as possible. Have a nice day.

Dialogue Transcript 3

Lynn : Good morning. Osay Shipping Corporation. This is Lynn speaking. How may I help you?

Caller : Hi, could I please speak to Ms Anton in the Processing Department?

Lynn : Just a moment. I'll check and see if she's in. (pause....)

Lynn : Sorry but she's just gone to lunch. Could I take your name and number and I'll ask her to call you back.



- Caller : *Certainly. My name's Maria Cantos and I can be reached all afternoon on 2654 3455. But I'm going to be in Shanghai tomorrow, so let me give you that number as well. It's (21) 2632 4456.*
- Lynn : *So you can be reached today on 2654 3455 and tomorrow in Shanghai on (21) 2632-4456.*
- Caller : *That's right.*
- Lynn : *Is your family name spelt K-A-N-T-O-S?*
- Caller : *Actually, it's with a C not a K.*
- Lynn : *OK, I've got that.*
- Lynn : *Fine. I'll pass the message on as soon as I see her. Have a great afternoon.*

Dialogue Transcript 4

- A: *Good afternoon. Compucon Ltd. This is Jenny speaking. How can I help you?*
- B: *Could you put me through to your Sales Department, please?*
- A: *Certainly. Could I have your name, please?*
- B: *Yes, it's Richard Lo.*
- A: *Right, Mr Lo, I'm putting you through now.*
- C: *Sales Department. Susan Cho speaking.*
- A: *Good morning. This is Richard Lo. I'm calling about an order. I ordered a new printer from you nearly three weeks ago and I haven't received it yet.*
- C: *I'm sorry to hear that, Mr Lo. Let me just get some more details. What was the date of the order?*

Dialogue Transcript 5

- A : *Good morning, Arthur Johnston Ltd. This is John speaking. What can I do for you?*
- B : *Hello. Could I speak to Jeff Chan, please?*
- A : *May I have your name, please?*
- B : *This is Kelly Thompson.*
- A : *I'm afraid Mr Chan isn't available at the moment, Ms Thompson. Could I ask him to call you back later this afternoon?*
- B : *Yes, could you?*
- A : *Could I have your contact telephone number, please?*
- B : *I'll give you my mobile number in case I'm out later. It's 094783784.*



- A: *That's 094783784.*
- B: *That's right.*
- A: *Would you like to leave a message for Mr Chan?*
- B: *Yes, could you tell him I've emailed him a quotation for the English course and attached a proposed outline of the course.*
- A: *So you've emailed Mr Chan a quotation for the English course and attached a proposed outline of the course.*
- B: *Yes, that's right.*
- A: *Is your family name spelt T-O-M-P-S-O-N?*
- B: *No, it's T-H-O-M-P-S-O-N?*
- A: *OK, I've got it. With an 'h.'*
- B: *Yes.*
- A: *Thank you for your call, Ms Thompson. I'll see that Mr Chan gets your message as soon as he gets in.*
- B: *Thanks very much. Goodbye*
- A: *You're welcome. Goodbye.*

Language Focus – Forming Questions with Modal Verbs

Looking through the list of standard telephone phrases, you'll notice that many of the questions are formed using modal verbs such as **can**, **may**, and **could**. We use these three modal verbs when making offers and requests. They help the language we use sound more polite, especially when used in a question.

Form

In a statement the word order is subject + modal + main verb.

<i>subject</i>	<i>modal</i>	<i>main verb</i>	
<i>I</i>	<i>can</i>	<i>help</i>	<i>you.</i>

In questions, the word order changes to modal + subject + main verb

<i>modal</i>	<i>subject</i>	<i>main verb</i>	
<i>Can</i>	<i>I</i>	<i>help</i>	<i>you?</i>

Offers



May and **can** are used to make offers. You should offer to help a caller when you answer the phone on behalf of your company. In certain calls, where the person the caller wants to speak to is unavailable, you should also offer to take a message.

*May I help you?
Can I help you?
May I take a message?*

Neutral Requests

When using **can** to make a request, the request may sometimes sound a little direct. It depends a lot on the tone of your voice, however. So if you use **can** to make a request, make sure you use a polite and friendly tone.

*Can you hold the line?
Can I ask who's calling, please?
Can I take your number?*

Polite Requests

Could is the most commonly used modal verb when making requests. Requests formed using **could** sound more polite.

*Could I have your name?
Could I have your telephone number?
Could you spell your first name?
Could I check the spelling of your street?
Could I speak to Jason Tam, please?
Could you put me through to the Sales Department?
Could you connect me to Shirley Tam in Auditing?
Could you transfer me to William Bell on extension 288?*

Very Polite Requests

If you want to sound very polite (and perhaps a little formal), you can use the modal verb **may** to form your request.

*May I have your name, please?
May I know who's calling?
May I know which company you're calling from?*



When Someone is Unavailable

Dialogue Transcript 1

- Neela :* Cathay Designs
- Caller 1 :* Hello, May I speak to Mr Pulido, please?
- Neela :* I'm afraid Mr Pulido is in a meeting right now. May I take a message?
- Caller 1 :* Could you tell him that Nicholas Comtee called?
- Neela :* Would you mind spelling your last name for me, sir?
- Caller 1 :* No problem. It's C-O-M-T-E-E.
- Neela :* Thank you. And your telephone number?
- Caller 1 :* He's got it. Thank you.
- Neela :* My pleasure. Have a good day!

Dialogue Transcript 2

- Neela :* Cathay Designs
- Caller 2 :* Hi. I'm trying to get some information about a design project.
- Neela :* Okay. Is it a new project or an existing one?
- Caller 2 :* It's a new project.
- Neela :* I will connect you to the New Accounts department and a designer can answer your questions. Since it's lunchtime now, they may be at lunch, so if you get the voicemail, please just leave a message. I'm connecting you now, ma'am.
- Machine :* Hello. You've reached the New Accounts Head Designer, Linda Gao, and I'm unable to take your call at the moment. Please leave me your name and number and I will call you back as soon as I can.
- Caller 2 :* Hi. My name is Patricia Lee and I would like to speak with someone about a new expansion to my business. Could you please call me back today? Again, my name is Patricia Lee and I can be reached on 6522 3454. Thank you.



Dialogue Transcript 3

- Neela :* Cathay Designs
- Caller 3:* Yes, I need to speak to Russ Pulido.
- Neela :* Mr Pulido is in a meeting right now. He should be finished shortly. May I take a message?
- Caller 3:* Well, I'm at the airport now and boarding a flight for Singapore. I must get a message to him immediately. Could you interrupt him?
- Neela :* I'm terribly sorry, sir, but his meeting is off-site. But he told me before leaving that he would be back within the hour.
- Caller 3:* OK. Tell him that the paint samples didn't make it to my Shanghai office in time, so he should have them sent to my Singapore office immediately. I must have them before my client meeting tomorrow at 1 p.m.
- Neela :* I've got that, miss. Could you give me your name, please?
- Caller 3:* Jessica Amnajanman. My last name is spelled A-M like mother N like nice A-J-A-N like nice M like mother A-N.
- Neela :* And can you give me your Singapore address?
- Caller 3:* My company's name is Asia Construction. The address is 9 Raffles Place, Republic Plaza, Suite 2614, Postal code 048619. Let me give you that telephone number, too, just in case there's a problem: it's country code 65. Number 6832-9886.
- Neela :* OK I've got that. Let me repeat all that back to you. Your name is Jessica Amnajanman. Your company is Asia Construction. The samples originally sent to your Shanghai office didn't arrive in time, so you would like Mr Pulido to send them to your Singapore office for a client meeting tomorrow afternoon at 1. The address there is 9 Raffles Place, Republic Plaza, Suite 2614 and the postal code is 048619. The telephone number in Singapore is 65-6832-9886.
- Caller 3:* That's right. And, one more thing. Please tell Russ to put in the specs for the Credit Tiger client. I'm also going to need those on Wednesday.
- Neela :* The specs for Credit Tiger. Got it. Anything else, miss?
- Caller 3:* I think that about covers it. My flight arrives in Singapore at 3.45, so if Russ has any questions he can call me on my mobile after then. My mobile number is 86-138-0180-4944.
- Neela :* That's 86-138-0180-4944?
- Caller 3:* Yes, that's right. Thanks for all your help.



Neela : *You're welcome. And I'll make sure Mr Pulido gets the message as soon as possible. Have a nice flight. Good bye.*

Dialogue Transcript 4

Reception: *Trebbett and Williamson Ltd. How can direct your call?*

Greg: *Could you give me extension 2748, please?*

Reception 1: *Just a moment.... Go ahead, caller. You're connected.*

Reception 2: *Nancy Hoggard's desk. Can I help you?*

Greg: *Yes, could I speak to Nancy, please?*

Reception 2: *I'm afraid she's out of the office at the moment.*

Greg: *Do you know when she'll be back?*

Reception 2: *She should be back after lunch. May I take a message?*

Greg: *No, that's OK. I'll call back later this afternoon. Thanks for your help.*

Reception 2: *You're welcome.*

Greg: *Goodbye.*

Dialogue Transcript 5

Neela : *Cathay Designs*

Caller : *Hi. Would you connect me to Paul Andersen?*

Neela : *Just a moment, sir. I'll check and see if he's in. It's looks like Mr Andersen is out of the office today. I'd be happy to take a message.*

Caller : *Hmmm. Well he told me he would call me back today. I'm expecting some blueprints to be sent to me.*

Neela : *OK. I can leave him a message, sir, and perhaps he will call this afternoon and pick up his messages.*

Caller : *Yeah, that's a good idea. My name is Peter Mok and I'm with OntCan Enterprises. My number is 8766-4560.*

Neela : *That was Peter Mai?*

Caller : *Peter Mok. M-O-K.*



- Neela :* *OK. Peter Mok on 8766-4560. You were expecting some blueprints this afternoon. I will ask Mr Andersen to call you back as soon as possible.*
- Caller :* *Yes, and it's rather urgent.*
- Neela :* *No problem, sir. I will make a note of that. What was the name of your company again?*
- Caller :* *OntCan Enterprises. We are in Kowloon.*
- Neela :* *Got it. Hopefully Mr Andersen will call in for his messages soon and will be able to get back to you in a short while.*
- Caller :* *I appreciate your help.*
- Neela :* *It was my pleasure.*



Taking Telephone Messages

Introduction

Taking telephone messages well is a skill that saves time for both the caller and the receiver.

If you need to take a message for someone, get as much information as possible. Always include:

- The date and time of the call.
- The full name of person calling (ask for correct spelling).
- The company the caller is from.
- The phone number and time available for call-back.
- The purpose of the call.

Give enough information to the caller so they know what to expect, such as when the person they are trying to reach will return.

When taking a message, avoid saying, "I'll have him call you back when he returns." It would be better to say, "I'll make sure he gets your message when he returns."

Bear the following points in mind when leaving a telephone message

- Don't speak too fast!
- Pronounce and spell your name clearly.
- Slow down when saying your telephone number and pause somewhere in the sequence of providing your number.
- Give your company name, title and reason for calling.
- Let them know when to call you back.

Situation 1

Here are two short telephone conversations. In both situations the person the caller wants to speak to is either out of the office or unavailable. Focus your attention on how the receptionists handle the calls and the steps involved in taking a message.

Dialogue 1

Receiver : Kwan Brothers, Customer Service. I'm Jenny. How may I help you?

Caller : Hello. This is Peter Hedison speaking. I'd like to speak to Keith Wong, Please.

Receiver : I'm sorry Mr Hedison, but Mr Wong is in a meeting this morning? Would you like him to call you back?

Caller : Yes, I would.



- Receiver : *May I have your telephone number and the name of your company?*
- Caller : *I'm calling from Keytech Supplies and my number is 2738 3829.*
- Receiver : *So you are Peter Hedison of Keytech Supplies and Mr Wong can reach you on 2738 3829.*
- Caller : *That's right. Could I also leave a short message?*
- Receiver : *Yes.*
- Caller : *Could you tell Mr Wong that the delivery of desks will be delayed until next Monday? And could you remind him to settle our invoice before we deliver the desks?*
- Receiver : *Let me just confirm that. The delivery of desks will be delayed until next Monday and your invoice should be settled before the delivery.*
- Caller : *That's correct.*
- Receiver : *When would be a good time for Mr Wong to call you, Mr Hedison.*
- Caller : *I'll be in the office all day, so he can call me anytime today.*
- Receiver : *I'll make sure Mr Wong gets your message. Thank you for calling. Goodbye*

Dialogue 2

- Receiver : *Good morning, Arthur Johnston Ltd. This is John speaking. What can I do for you?*
- Caller : *Hello. Could I speak to Jeff Chan, please?*
- Receiver : *May I know who's calling, please?*
- Caller : *This is Kelly Thompson.*
- Receiver : *I'm afraid Mr Chan is tied up at the moment. Could I ask him to call you back later this afternoon?*
- Caller : *No, that won't be necessary, but could I leave a message for him?*
- Receiver : *Certainly.*
- Caller : *Could you tell him that I've emailed him a quotation for the English course and attached a proposed outline of the course? Could you ask him to email me if he has any queries?*
- Receiver : *So you've emailed Mr Chan a quotation for the English course and attached a proposed outline of the course. He can email you if he has any questions.*
- Caller : *Yes, that's right.*



Receiver : Could you tell me your company name and contact number, Ms Thompson?

Caller : I'm calling from Key Language Associates on 2819 3829.

Receiver : So, you're Kelly Thompson of Key Language Associates and your telephone number is 2819 3.....

Caller : 2819 3829

Receiver : OK.. 2819 3829. Thank you for your call, Ms Thompson. I'll see that Mr Chan gets your message.

Caller : Thanks very much. Goodbye.

Receiver : You're welcome. Goodbye.

Notes

In both these telephone dialogues, the receptionist answers the phone and gives the caller specific information. Usually this information consists of:

- A greeting
- The name of the company and/or the name of the department.
- The name of the person answering the phone
- A friendly question to guide the call.

So let's break this down a bit. Firstly, we'll look at the greeting.

The most common greeting on the phone is "Hello," but some people prefer to be more specific like:

Good morning.

or

Good afternoon.

Sometimes, in a more informal working environment, a simple "Hi" might be an acceptable greeting. But generally, it's best to use more formal greetings.

Secondly, when answering the phone, you should give your name, the name of your company and, if applicable, the name of your department. Here are some examples:

This is Convoco and I'm Charlie.

Convoco, Accounting, Charlie Speaking.

Accounting Department. This is Charlie.

Convoco This is Charlie speaking.

Note that part of this will be determined by WHO answers the phone: if you are answering the main line, you might say all of this. If you work in the accounting department and the call has been transferred from somewhere else, you might just answer:



*Accounting, this is Charlie.
Accounting Department. Charlie speaking.*

Next, let's look at the question part. It's very common to follow the greeting and your details with a polite question. Here are some common ones:

*How can I help you?
May I help you?
How may I help you?
What can I do for you?*

If you're acting as a receptionist, you might ask:

How may I direct your call?
or

How may I connect you?

Now let's return to the telephone dialogues you've just read through.

One important thing you'll notice in the first dialogue is the number of questions asked by both the caller and the receiver. These questions are generally requests for information, requests for permission, or just basic requests. Modal verbs are commonly used in these types of questions:

*Could I...?
May I...?
Can I...?
Would it be OK if I...?
Would it be possible for me to...?*

Sometimes instead of using a question to make a request, the request is made using a statement:

*I'd like to...
I was wondering if I could ...
I was hoping to...
I'd be grateful if you could...
I'd appreciate it if you would....*

Peter Hedison wants to speak to Mr Wong. He asks for him like this:

I'd like to speak to Mr Wong, please.

Peter might also have said:

*I was wondering if I could talk to Mr Wong, please.
I was hoping I could speak to Mr Wong, please.*

He also could have used a question:

*Could I please speak to Mr Wong?
May I speak to Mr Wong, please?*

Either a polite statement or a polite question is fine. But avoid using statements which are too direct, such as:



*I must speak to Mr Wong.
I want to talk to Mr Wong.
Connect me to Mr Wong.*

It's always better to be as polite as you can be, especially in business situations.

If the person the caller wants to speak to is available, then your job is almost done. But first you need to check. You could say:

*Just a moment, Sir. I'll see if he's available.
Please hold the line and I will transfer you.
I'll connect you now.
Would you mind holding for a minute?*

Sometimes, though, calls are "screened". This means that Peter might be in the office, but he only wants to talk to certain people (only his boss, for example, and no clients). In cases like this, you can ask the caller for more information:

*May I ask who's calling?
Can I ask your name?
Who may I say is calling?*

If Peter can't come to the phone, if he is out, or unavailable, you need to be careful not to be too direct. Don't say:

*He's out.
He's not here.
No, you missed him.*

These kinds of sentences are far too short and are considered impolite, especially in a business situation. Instead, use extra words to "pad out" the bad news:

*I'm sorry, sir, but he's not in at the moment.
I'm afraid Mr Davis is out of town.
I'm unable to locate her right now, I'm afraid.
Unfortunately, Mrs Williams has just left the office.
I'm sorry but Mr Chan is in a meeting.*

But it doesn't end there—next you have to offer to take (or leave) a message:

Taking messages is often an important part of using the phone for business. After telling the caller that the person they want to speak to is either unavailable or out, it's best to ask:

*Would you like to leave a message?
Could I take a message for you?
Do you have a message for Mr Evans?*

If you are the caller, you can also ask to leave a message:

*Would you mind if I left a message?
Could I possibly leave a message?
I'd like to leave a message, if I can.
May I leave a message for him?
Can I leave a message?*



Sometimes the message might be very detailed. If you feel unsure or uncomfortable about taking such a long message with a lot of details, one option is to say:

Sir, would you mind if I transferred you to his voicemail? I know he checks his messages when he's not in the office.

Would you like me to transfer you to her voicemail? That might be the quickest way to get hold of her.

That's a very detailed message. Maybe it's better if you leave that on his voicemail. That way he'll get all the information.

Or if you are the caller, you can request this:

Would you mind transferring me to his voicemail? I have a detailed message I'd like to leave.

Do you know if she checks her voicemail messages when she's out of the office? I'd like to leave her a message there, if I may.

Could you transfer me to her voicemail? I'd like to leave her a message.

Because talking on the phone is never as easy or as clear as face-to-face conversation, clarifying details is essential, even for native English speakers. Here are some common phrases used to clarify information:

Do you mean that...?

Was that...?

Are you saying that...?

So you'd like him to...?

You can also tell the caller that you're going to clarify the information you've been given:

I'd just like to clarify everything with you.

Would you mind if I repeat that back to you?

Let me repeat that back to you.

Let me clarify those details.

Clarifying is so important when recording telephone or account numbers, spelling certain names, taking detailed information, as well as times and dates. Don't feel embarrassed about asking a caller to repeat information or to clarify what they mean. Even native English speakers need to do this!

If the caller is speaking too quickly, don't panic! Just ask them to speak more slowly or repeat what they have said:

Sorry, Sir. Could you say that again, please?

I'm afraid I didn't catch that, Ma'am. Could you repeat it?

I'm sorry. Could you say that again more slowly?

Would you mind speaking more slowly, please?

Perhaps the caller has a name or company name you're not familiar with. No problem! Just ask:

Could you spell your last name, Sir?

Would you mind spelling that?

How do you spell your company name, please?

When getting ready to end a call, there are a few ways to reassure the caller that the message will be passed on (unless the caller has been transferred already to voicemail). Doing this reassures



the caller that you will pass on the message. Note that it's best not to say: "I will have him call you as soon as possible." It's not a good idea because you might NOT have a chance to tell him. Or he might not want to call this person back—perhaps he has more important clients waiting. It's better just to let the caller know that you will pass the message on. Say something like this:

I will make sure he gets this message, Sir.

I'll pass your message on to her as soon as I see her.

I'll see that she gets the message as soon as she's back in the office.

A closing can be a simple "Goodbye." Or you can be more specific:

Have a great afternoon, Sir.

I hope the conference goes well!

Have a nice weekend!

Have a nice day!

Additional Dialogue Transcripts

Message:

Message for:	Roger Wellington
Caller:	Timothy Walton
Company:	Royden
Tel Number:	964728953
Message:	Please email the technical specifications for the under-floor heating at Spring Valley Gardens.

Dialogue Transcript 1

Receptionist: Good morning. Goodman Construction. How may I help you?

Customer: Could you put me through to Roger Wellington, please?

Receptionist: I'm afraid Mr Wellington is out of town at the moment.

Customer: Is he? Do you have any idea when he'll be back?

Receptionist: He should be in the office tomorrow afternoon. If not then, it will be Thursday morning.

Customer: Could you pass on a message to him?

Receptionist: Certainly.

Customer: Could you tell him that Timothy Walton from Royden called? Ask him if he can email me the technical specs for the under-floor heating needed for the residential units at Spring Valley Gardens.

Receptionist: Could you just spell your company name for me, please, Mr Walton?

Customer: It's R-O-Y-D-E-N.



Receptionist: OK. Thanks. And you want him to email you the technical specifications for the under-floor heating at Spring Valley Gardens.

Customer: Yes. That's right.

Receptionist: Does Mr Wellington have your number?

Customer: He does but I'll be out of the office for the next couple of days. Could you give him my mobile number in case he wants to speak to me about the specs? It's 964728953.

Receptionist: That's 964728953.

Customer: That's correct.

Receptionist: OK, I'll pass your message onto Mr Wellington as soon as I see him. Goodbye.

Customer: Bye.

Message:

Message for: John Carpenter
 Caller: Kerry Wayne
 Company: Novalis
 Tel Number: 26174783
 Office Number: 964728384
 Message: Please call Mr Wayne to clarify some points regarding the packaging design of Super Transporter. If after 4 p.m. call his mobile.

Dialogue Transcript 2

Receptionist: Good afternoon. Goodman Construction. Can I help you?

Customer: I'd like to speak to John Carpenter, please.

Receptionist: I'm sorry but Mr Carpenter is tied up at the moment.

Customer: Do you know when he'll be free?

Receptionist: Well, he's in a meeting and I'm not sure when it will finish. Can I take a message?

Customer: Yes. Could you ask him to call Kerry Wayne of Novalis Ltd?

Receptionist: Would you mind spelling your family name?

Customer: It's W-A-Y-N-E.

Receptionist: And did you say you work for Navelis?

Customer: No, it's Novalis. N-O-V-A-L-I-S.

Receptionist: OK. Novalis. And could you give me your contact number, Mr Wayne?



Customer: My office number is 2617 4783, but he should call me on my cell phone after 4pm. The number's 964728384.

Receptionist: Right. I've got that. Would you like to leave a message?

Customer: Just tell him that I need to clarify some points concerning the design of the packaging for the Super Transporter toy.

Receptionist: So you want to clarify some points regarding the packaging design of Super Transporter.

Customer: Yes.

Receptionist: All right, Mr Wayne. I'll see that Mr Carpenter gets your message.

Customer: Much appreciated. Goodbye.

Receptionist: Bye.

Message:

Message for: Bill Brudford

Caller: Jim Dawson

Company: Jameson Plastics

Message: The shipment from Vietnam should be delivered to our factory on 21 May. A port strike in Hanoi caused the delay.

Dialogue Transcript 3

Receptionist: William Bond Associates. This is Grace speaking. How may I help you?

Customer: Hi, there. Could I speak to Bill, please?

Receptionist: Do you mean Bill Brudford?

Customer: Yes.

Receptionist: I'm afraid Mr Brudford's not available at the moment. Would you like to leave a message for him?

Customer: Yes. Could you let him know that Jim called. Jim Dawson from Jameson Plastics.

Receptionist: Jim Dawson from

Customer: From Jameson Plastics.

Receptionist: Is that spelt J-A-M-E-S-O-N?

Customer: Yes, it is.

Receptionist: Do you have a message for Mr Brudford?



- Customer: Could you tell him that his shipment from Vietnam has been delayed by a port strike in Hanoi? We estimate that the shipment will be about seven days late. We should be able to make the delivery to your factory on 21 May.*
- Receptionist: OK, so the shipment from Vietnam should be delivered to our factory on 21 May. A port strike in Hanoi caused the delay.*
- Customer: That's right. Just ask him to email me if he wants any other information about the shipment.*
- Receptionist: Does he have your email address?*
- Customer: Yes, he does.*
- Receptionist: Right. I'll see that Mr Brudford gets your message, Mr Dawson.*
- Customer: Thanks a lot.*
- Receptionist: Goodbye.*
- Customer: Bye.*

Dialogue Transcript 4

- A: Barten Finance. This is Jennifer. Can I help you?*
- B: Good morning. I'd like to speak to Roy Kim, please.*
- A: Oh, I'm afraid that Mr Kim is not in today. Could I take a message for him?*
- B: Oh, thank you. Could you tell him that Felicia Lim called?*
- A: Certainly. Could you spell your first name?*
- B: Sure. It's F-E-L-I-C-I-A. And my telephone number is 3455-2311. Extension 1231.*
- A: Right. Let me repeat that back to you. That was 3455-2319. Extension 2311.*
- B: Not quite. Telephone: 3455-2311. Extension 1231.*
- A: Oh, sorry. 3455-2311. Extension 1231.*
- B: Right. And I was hoping I could come in and speak with Roy on Thursday between 2 and 4.30.*
- A: Thursday between 2 and 4.30?*
- B: Yes. But I'd like him to call me anyway and schedule a specific time, if he can. I'll be in the office all day tomorrow.*
- A: OK. I will pass him the message as soon as I see him.*
- B: Thank you very much.*





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Passing on Messages to Clients

Introduction

Remember when passing on messages to clients, details are very important. It does no good to relay a message if you've forgotten the time of the appointment or can't remember the name of the person calling. Everyone makes mistakes and sooner or later most people forget a detail, but the most important thing is communicating this information clearly and accurately.

When you're being given a message to pass on to someone, never be afraid to ask for clarification, repetition or anything else, particularly when dealing with detailed information. It's much more important to ask a few times and be sure it's right than to give out the wrong information.

Situation 1

In this situation Beth is relaying some messages to her company's clients. Beth works as a receptionist for a large garment manufacturer. Today is the first day back in the office after a one-week holiday, and several managers are still on vacation. They've instructed Beth to pass on messages to clients they know will be calling.

Dialogue 1

- Beth:* Berman Textiles. How can I help you?
- Client One:* Could I please speak with Mr Brown?
- Beth:* I'm sorry, Mr Brown is out of the office today. Could I ask your name, sir?
- Client One:* Yes, I'm Paul Dai.
- Beth:* Oh, yes, Mr Dai. Mr Brown asked me to relay a message to you if you called this morning.
- Client One:* OK.
- Beth:* He wanted me to tell you that the goods were shipped from the factory to your new Beijing address but that the linens you requested have been delayed due to a customs problem and they won't be shipped until next Wednesday.
- Client One:* Sorry, I'm on the cell and you're breaking up a bit. Did you say the linens are delayed?
- Beth:* That's right, sir. They are delayed because of a customs problem. But the other goods were shipped to the Beijing address.
- Client One:* OK, got it. Did he say how he shipped the goods?



Beth: Yes, he said that they were shipped via GHM shipping.

Client One: Great. Thanks for passing on that information. Have a great day.

Beth: You, too, Mr Dai.

Notes

Beth answers the first call with a standard opening. She says:

Berman Textiles. How can I help you?

She states the name of the company and she asks how she can help. As she is a receptionist, it's not necessary for her to state her name. This is optional.

Let's now practice some standard call openings. Repeat these sentences:

Berman Textiles. How can I help you?

Berman Textiles. How may I help you?

Berman Textiles. What can I do for you?

The caller wants to speak to someone in the company and asks:

Could I please speak with Mr Brown?

Use the polite request phrases "Could I please speak to or with" or "May I speak to or with" followed by the person's name. Note that you can include 'please' before the main verb or at the end of the sentence. You could also use the phrase "I'd like to speak to" but this is a little less polite and more direct than "Could I speak to." Let's practice using these phrases.

Could I speak to John Jennings, please?

May I please speak to John Jennings?

I'd like to speak to John Jennings.

There are a number of standard phrases you can use to let the caller know that the person they want to speak to is out, unavailable or just busy. This is what Beth says:

I'm sorry, Mr Brown is out of the office today. Could I ask your name, sir?

First of all she apologises by saying "I'm sorry." Then she explains why Mr Brown can't answer the phone. And finally, she asks for the caller's name. These are the three steps that you should take whenever someone is unable to take a call. But you can vary the language you use. Instead of saying "I'm sorry," it is common to say "I'm afraid." Let's practice:

I'm afraid Mr Brown is out of the office at the moment.

I'm afraid Mr Brown is not available right now.

I'm afraid Mr Brown is in a meeting at the moment.

Beth says "Could I ask your name, sir" when asking for the caller's name. When asking for a caller's name we usually use the following phrases.

Could I ask your name?



May I ask your name?
Could I have your name?
Can I have your name?
May I have your name?

Of course, it is more polite if you add 'please' to the end of these phrases.

When Beth hears that the caller is Paul Dai, she remembers she needs to pass on a message to him from Mr Brown. She says:

Oh, yes, Mr Dai. Mr Brown asked me to relay a message to you if you called this morning.

To "relay" something is to pass it on to someone else. We can also say "pass on a message" or "give a message" as in these sentences.

Mr Brown asked me to pass on a message to you.
Mr Brown told me to give you a message.
Mr Brown has a message for me to give you.
Mr Brown wanted me to give you a message.
I have a message here for you from Mr Brown.

Let's see again how Beth passes on the message to the caller. She says:

He wanted me to tell you that the goods were shipped from the factory to your new Beijing address but that the linens you requested have been delayed due to a customs problem and they won't be shipped until next Wednesday.

Normally, when we report what someone else has said, we use reported speech. When you're passing on messages, however, just give the message to the caller in a natural way as if the message comes directly from you. There's no need to change the tense of the verbs, etc to show that the speech is reported. But it is important to inform the caller that this message comes from someone else and not from you. So the first phrase is important. Beth says "He wanted me to tell you that...." Here are some other useful starting phrases.

Ms Jones said that
David asked me to let you know that
Ms Wong wanted me to tell you that
Mr Hackett said to tell you that
Nancy told me to ask you if.....

If you are the caller, it's important that you check to make sure that you've understood the message correctly. Notice how the caller asks for clarification of one of the details. He says:

Sorry, I'm on the cell and you're breaking up a bit. Did you say the linens are delayed?

Beth could have answered this with a short simple "yes." However, she goes further than this to make sure the callers understands the message fully. She says:

That's right, sir. They are delayed because of a customs problem. But the other goods were shipped to the Beijing address.

She confirms the delay, explains the reason for the delay and repeats the last part of the message. It doesn't take long to repeat a message, even if you haven't been asked to repeat it. To be safe, if you feel the caller is unclear, repeat the whole message again.



The caller confirms that he's understood the message by saying "OK, I've got it." "I've got it" means I understand. He could also have said:

*OK. I understand now.
Thanks. I'm clear now.*

Situation 2

In the next situation Beth passes on another message to a client.

Dialogue 2

- Beth: Berman Textiles. How can I help you?*
- Client Two: I'm hoping I can speak with Jennifer Grant.*
- Beth: I'm sorry. Jennifer won't be back in the office until tomorrow morning. Can I have your name?*
- Client Two: Yes, this is Pierre Tremblay.*
- Beth: Oh, hello, Mr Tremblay. Ms Grant has a message for me to give you. She wanted you to know that the Thursday meeting has been moved to Friday morning at 10 a.m.*
- Client Two: Oh, OK. Thanks.*
- Beth: And she also wanted me to tell you that they have shifted the meeting room from the 8th floor to the 9th.*
- Client Two: OK. You're a lifesaver. Will you tell her that I will call her tomorrow afternoon? I have a question about the content.*
- Beth: Certainly. I will tell her. Have a good day.*

Notes

The pattern of this dialogue is similar to the first dialogue. Here we'll just focus on the message part of the dialogue.

- Beth: Oh, hello, Mr Tremblay. Ms Grant has a message for me to give you. She wanted you to know that the Thursday meeting has been moved to Friday morning at 10 a.m.*
- Client Two: Oh, OK. Thanks.*
- Beth: And, she also wanted me to tell you that they have shifted the meeting room from the 8th floor to the 9th.*



You'll notice in this time Beth doesn't give the whole message in one go. After the first part she pauses to allow the caller to confirm that he understands. This is good practice especially if there is more than one part to the message. To indicate there's a further part to the message, Beth uses the phrase 'And, she also wanted me to tell you that....' Here are some other phrases to introduce a further part to a message.

He also said that
And, he asked me to let you know that
She also wanted me to tell you that
And, he said to tell you that
She also told me to ask you if.....

Situation 3

Beth passes on a third message to a client.

Dialogue 3

Beth: Berman Textiles, this is Beth speaking. How can I help you?

Client Three: Hi, Beth. This is Neil Crane. I was hoping that I could speak to Jake Brown?

Beth: Oh, sorry Neil. Mr Brown is out until tomorrow. But he wanted me to give you a message.

Client Three: Oh, great. OK, what's the message?

Beth: He wanted you to know that the Archer account has cancelled their last two orders because of a customs problem. He wants you to call the Duty Ministry and see if you can track where the last two shipments are and then call Archer and see if you can get them to take those orders anyway. If they will only be another day or so, they may still take the goods. He wanted me to stress the urgency and that we get moving soon on this.

Client Three: OK, got it. Thanks a lot, Beth. Will he be in in the morning tomorrow?

Beth: Yes and he wanted you to call him then.

Client Three: I'll do that. Thanks!

Notes

In the final dialogue we'll focus on the language you should use when someone is out, unavailable or just can't take a call at that time. Here's Beth again:

Oh, sorry Neil. Mr Brown is out until tomorrow. But he wanted me to give you a message.

As we mentioned earlier, the first thing you need to do is to apologise for the person not being available. In this case, Beth seems to know the caller since she addresses him by his first name.



She says “Oh, sorry Neil”. In fact it is good practice to include the caller’s name if you know it. You can include the caller’s name if you use the phrase “I’m sorry,” or “I’m sorry but.” Practice saying these sentences:

I’m sorry, Jane. Mr Tam is out of town until next Monday.
I’m sorry, Mr Williams, but Mr Smith is in a meeting at the moment.
I’m sorry, Paul. Nancy has just stepped out of the office.
I’m sorry, Ms Evans, but Ms Benson is off sick at the moment.

If you don’t use the phrases “I’m sorry,” or “I’m sorry but” you can use the phrase “I’m afraid.” Let’s practice saying the same sentences with “I’m afraid.”

I’m afraid Mr Tam is out of town until next Monday.
I’m afraid Mr Smith is in a meeting at the moment.
I’m afraid Nancy has just stepped out of the office.
I’m afraid Ms Benson is off sick at the moment.

Moving on to the message part of the dialogue, have a look at Beth again and note how she breaks up the message so it’s easier for the caller to understand:

Beth: He wanted you to know that the Archer account has cancelled their last two orders because of a customs problem. He wants you to call the Duty Ministry and see if you can track where the last two shipments are and then call Archer and see if you can get them to take those orders anyway. If they will only be another day or so, they may still take the goods. He wanted me to stress the urgency and that we get moving soon on this.

Beth breaks the message down in short sentences. As with the other messages, she introduces the message with a phrase to make clear that the message is from someone else. She says “He wanted you to know that...” Also, at intervals she continues to use similar phrases to introduce other parts of the message. She says “He wants you to call...” and “He wanted me to stress the urgency.” Using such phrases makes it easier for the message giver. Instead of saying “You should call the Duty Ministry,” Beth says “He wants you to call the Duty Ministry”. Instead of saying “This is really urgent,” she says “He wanted me to stress the urgency.” These phrases allow you to give direct messages in an indirect manner.

Conclusion

If someone gives you a message to pass on to a caller, make sure you write it down so you remember to include all the points. This is particularly important if the message has more than one part. When passing on a message, use an introductory phrase to make clear that the message is from someone else. If the message is complex, break it down into short sentences. Use connectives such as ‘and’ and ‘also’ to indicate that there are further parts to the message.

If you are receiving a message, make sure that you query anything that isn’t totally clear. Ask the speaker to rephrase or repeat what they have said. Finally, confirm that the message is clear.

Additional Dialogue Transcripts

Dialogue Transcript 1

Switchboard: Morris Travel. This is Tracy speaking. How can I help you?



Caller: *Hello Tracy. This is John Withers speaking.*

Switchboard: *Oh, Hi, John.*

Caller: *I was hoping that I could have a quick word with Harry Tang.*

Switchboard: *I'm sorry, John, but Harry's on annual leave at the moment and won't be back in the office until next week.*

Caller: *Is he? Oh, I know I should've called him as soon as I got back to Hong Kong.*

Switchboard: *He did leave a message for you, though. He asked me to let you know that all your travel arrangements for your business trip to Australia, including flights, transfers and hotels, had all been booked. He said he'd email you the details when he got back to work next week.*

Caller: *That's great. That's all I wanted to talk to him about.*

Dialogue Transcript 2

Beth: *Berman Textiles, Beth speaking. How may I help you?*

Client Four: *Is Lynn Berman in?*

Beth: *No, I'm sorry she's unavailable. Would you like to leave your name?*

Client Four: *Mmmm...well. This is Chuck Dazzita and I was supposed to meet her tomorrow. But I'm not sure what time or place; I'm a bit out of the loop today!*

Beth: *Oh, yes, Mr Dazzita, I have a message here for you. Ms Berman wanted you to know that she will be in her office at 4.30 tomorrow afternoon to meet you.*

Client Four: *And where is her office?*

Beth: *Oh, you've never been? We're located in Causeway Bay. Are you coming by car or underground?*

Client Four: *Underground.*

Beth: *OK, just get off at the Causeway Bay station and take exit 1c. We are the first building on the right as you come out on to the street. Ms Berman will meet you in the lobby at 4.30.*

Client Four: *Was that exit 1c?*

Beth: *Yes.*

Client Four: *OK, thank you very much.*

Dialogue Transcript 3



- Switchboard: Haley Investments Ltd. How may I help you?*
- Caller: Hello, could I speak to Bill Tenant, please?*
- Switchboard: I'm afraid Mr Tenant is away on a business trip. He should be back on Tuesday morning.*
- Caller: Oh, he didn't tell me that.*
- Switchboard: May I know who's calling?*
- Caller: It's Peter Brandt of IFS WallBerg Ltd.*
- Switchboard: Actually, Mr Tenant has left a message for you, Mr Brandt. He had to leave in a rush and asked me to pass on the message if you called.*
- Caller: Oh, yes.*
- Switchboard: He said to tell you that the investments funds you'd discussed last week have all now been set up, and that no more paperwork was needed from you.*
- Caller: Oh, that's a relief. I was a bit concerned about it. Thanks for letting me know.*
- Switchboard: Is there anything else I can do for you Mr Brandt?*
- Caller: No that's all, I think. Thanks for your help. Goodbye.*

Language Focus – Reporting Phrases

When passing on a message to a client we usually begin the message with an introductory phrase such as “Mr Rivers wanted me to let you know that...” or “Jack asked me to tell you that” to indicate that we are reporting a message from someone else. If the message has a number of parts, it is quite usual to introduce other details of the message in a similar way such as “He wants you to call...” “He asked me to remind you to” and “He wanted me to stress....” Using indirect phrases like these helps to soften the message, particularly if the language in the message is direct and commanding.

Let's look at two messages which make use of reporting phrases:

Mr Benson wanted you to know that the Archer account has cancelled their last two orders because of a customs problem. He wants you to call the Duty Ministry and see if you can track where the last two shipments are and then call Archer and see if you can get them to take those orders anyway. If they will only be another day or so, they may still take the goods. He wanted me to stress the urgency and that we get moving soon on this.

Ms Chambers asked me to let you know that the Thursday meeting has been moved to Friday morning at 10 a.m. And she also wanted me to tell you that they have shifted the meeting room from the 8th floor to the 9th. She asked me to remind you to bring six copies of your company's annual report.



Language Focus – Using Connectives

If your message has a number of parts and if the parts are linked, we can use simple connectives such as “and that,” “but that,” and “also,” to show how the different points are related. Using connectives helps to clarify a message and make it easier to understand.

Note: “and that” and “also” show addition; “but that” shows contrast (+/-).

Let’s look at some of some messages which include connectives:

Mr Wong wanted me to tell you that the goods were shipped from the factory to your new Beijing address but that the linens you requested have been delayed due to a customs problem and that they won’t be shipped until next Wednesday.

Mr Lau asked me to remind you that the deadline to complete the work has been moved back to July 20. He also wanted me to tell you that Peter Trench would be replacing Bill Cousins as Chief Financial Officer on 1 July and that you should liaise with Mr Trench on all financial matters after that date.

Mr Johnson wanted you to know that all the equipment you installed at our factory is working perfectly but that we’re still waiting to receive the machine manuals. He also asked if you could courier the manuals to him as soon as possible and that he wanted you to confirm when you would do this.

Note: we use “and that” and “but that” in place of “and” and “but” because we are reporting what someone else has said. We are using someone else’s words.



Asking and Confirming Information

Introduction

Asking for information is an important aspect of business communication. It is especially important to be clear and direct while seeking information over the telephone, since not being face-to-face with the speaker may cause misunderstandings or mistakes in noting down details. Additionally, it is also important to verify or confirm the details that we receive, so that we can be sure that we have got the correct information.

Situation 1

This telephone dialogue is between Violet, the receptionist of a library, and Ryan, a potential member who has called in to ask about the process of getting a membership.

Dialogue 1

Violet: Good morning, this is Violet at Academic Council. How may I help you?

Ryan: Hi, I'm calling to enquire about a library membership.

Violet: I can certainly help you with that! May I know whom I'm speaking with?

Ryan: My name is Ryan Coltrane.

Violet: Thank you! Would you like an individual or institutional membership?

Ryan: Well, I'd just like to know a few details first. What are the benefits of each?

Violet: An individual membership allows you to check out four books and four journals for a period of three weeks. With an institutional membership, up to twenty employees of an organization may check out the same number of books and journals each, and also borrow materials from our CD-ROMs section.

Ryan: Can't I borrow CD-ROMs as an individual member?

Violet: We don't offer that facility to individual members, but you are welcome to browse through our CD-ROMs at the library. We have twenty workstations which individual members may use free of cost, as well as an electronic database from which you can request print outs at a nominal cost.

Ryan: That sounds good. Do you have any books or CD-ROMs on management?

Violet: Yes, we have a total of over 50,000 books and 10,000 journal subscriptions, with a separate floor devoted to business and management related materials.



- Ryan: *I'd like to check out your collection before confirming my membership—would that be possible?*
- Violet: *Of course! You can visit the library any time from 9.00 a.m. to 9.00 p.m. on any day, except for Sundays and public holidays. Please bring along proof of your identity. You can browse through our materials for a maximum of six hours for a fee of ten dollars.*
- Ryan: *Great, I'll do that one of these days! And what's the fee for an individual membership?*
- Violet: *Well, it's \$75 per month. But you can get a discount of 25% if you opt for a three-month membership and of 50% for an annual membership.*
- Ryan: *Thanks! Where exactly are you located?*
- Violet: *Our address is #134, Hegal Street. We're directly opposite the Cosmopolitan Hotel.*
- Ryan: *Great, that's just a couple of blocks from my place!*
- Violet: *That's wonderful—we hope to see you soon! In the meantime, if you would like more information about our facilities, please visit our website at www.theacademiccouncil.org.*
- Ryan: *Oh thanks—does that include a list of the titles you have in stock?*
- Violet: *Yes, it's very user-friendly! You can search for any book or article by title or author.*
- Ryan: *Excellent! Let me write this down. Did you say www.academiccouncil.com?*
- Violet: *No, that's www.theacademiccouncil.org.*
- Ryan: *www.theacademiccouncil.org. Got it, thanks!*
- Violet: *You're most welcome!*

Notes

From this telephone conversation, we see that Ryan, the caller, moves from general questions to very specific ones. Violet, the receptionist, is polite and courteous throughout the conversation. She has access to all the information that Ryan is asking for. Ryan has also done some thinking about what he wants to ask, since he has many questions. This shows us that even if we do not have specific details about a product or service that we want to enquire about, it is a good idea to prepare in advance a list of questions to ask.

Violet answers the phone by saying:

Good morning, this is Violet at Academic Council. How may I help you?



Violet's opening line contains four important things to keep in mind. First, she greets the caller warmly by wishing him 'Good morning'. Secondly, she makes sure that she gives her name to the caller, which makes the conversation direct and personal—she is letting the caller know that he is talking to a person at a desk, and not an automated response service. Thirdly, she clearly mentions the name of her organization so that the caller has no doubts that he has dialed the correct number. She also mentions that she can assist him with his queries by saying "How may I help you?"

Ryan replies by saying why he's calling:

Ryan: Hi, I'm calling to enquire about a library membership.

Violet: I can certainly help you with that! May I know whom I'm speaking with?

Note that it is perfectly acceptable to say "hi" or "hello" in response to a greeting like 'Good morning'. Ryan doesn't give his name at first, so Violet politely asks him for it by saying "May I know whom I'm speaking with?" This is an indirect way of asking for a person's name, and is more courteous than directly asking, "What is your name?"

Violet thanks Ryan for his name and then clarifies what type of membership he's interested in:

Violet: Thank you! Would you like an individual or institutional membership?

Ryan: Well, I'd just like to know a few details first. What are the benefits of each?

Violet's response lets Ryan know that there are two kinds of membership. He responds by saying that he wants to know more about each kind by saying, "I'd just like to know a few details first." Ryan could also have said:

Could you give me a little more information first?

I have a few questions first.

Could you tell me a little more about each kind of membership?

Ryan then wants to know if he can borrow CD-ROMs on a personal membership:

Ryan: Can't I borrow CD-ROMs as an individual member?

Violet: We don't offer that facility to individual members, but you are welcome to browse through our CD-ROMs at the library.

Ryan is quick to notice that there are some differences between the two kinds of memberships. However, if you receive too much information that you can't take in at once, you can ask for a clarification. For example, you can say:

I'm sorry, I didn't get that. Could you repeat that last bit, please?

I'm sorry, I'm not clear on that. Could you tell me again about the differences between the two?

Violet also makes sure that she gives Ryan some additional information which he may find useful. Since he has asked to borrow CD-ROMs on an individual membership and that facility is not available, she gives him extra information about how he can still access the library's CD-ROMs on an individual membership.

Ryan checks with Violet if it would be possible for him to visit the library:



Ryan: I'd like to check out your collection before confirming my membership—would that be possible?

Violet: Of course! You can visit the library any time from 9.00 a.m. to 9.00 p.m. on any day, except for Sundays and public holidays.

Ryan wants to visit the library first to make sure that the materials they have are useful to him, so he asks, "Would that be possible?" He could also have said:

*Would it be okay for me to visit the library first?
Is it possible for me to view the material before confirming my membership?*

Violet very efficiently tells Ryan about the library's working hours before he can ask. Following this, Ryan inquires about the fee that he will need to pay for a membership:

Ryan: Great, I'll do that one of these days! And what's the fee for an individual membership?

Violet: Well, it's \$75 per month. But you can get a discount of 25% if you opt for a three-month membership, and of 50% for an annual membership.

Also, note that Violet informs Ryan about possible discounts, even though he has not asked for this information.

Ryan then makes a clarification about the address of the library:

Ryan: Thanks! Where exactly are you located?

Violet: Our address is #134, Hegal Street. We're directly opposite the Cosmopolitan Hotel.

Ryan wants to know where the library is, so he asks "Where exactly are you located?" Again, this is more polite than directly asking, "What's your address?" Violet tells him the address and also includes a landmark, so that he can find the library easily.

Violet gives Ryan more information which may be of use to him:

That's wonderful—we hope to see you soon! In the meantime, if you would like more information about our facilities, please visit our website at www.theacademiccouncil.org.

By saying "We hope to see you soon," Violet politely tells Ryan that she hopes he will take up a membership. She also uses the phrase "in the meantime" to let him know that she has additional information that he may find useful before he visits the library.

Ryan responds by asking for a clarification and letting Violet know that he is writing it down:

Excellent! Let me write this down. Did you say www.academiccouncil.com?

By saying, "let me write this down," Ryan is letting Violet know that he wants to confirm the information she has just given him. He could also have put it differently:

*Could you repeat the address of your website, please?
Let me see if I've got that right—is it www.academiccouncil.com?*



Ryan has got the address wrong, so Violet corrects him. Note that she does not directly tell him, "You're wrong," but instead repeats the correct information. Also, she ends the conversation courteously by telling him that he is welcome.

Situation 2

Jenny goes to a bank to inquire about making an investment. She meets Vince, a customer service representative at the bank, who gives her the information that she is looking for. He assists her with her inquiries and suggests ways in which she can make the most profitable investment.

Dialogue 2:

Jenny: Hi, I need some information about personal investments. Have I come to the right desk?

Vince: Sure, I can help you with that! I'm Vince. Please take a seat.

Jenny: Thank you, Vince. I'm Jennifer Nichols. I'd like to know about the Mutual Funds policies you offer.

Vince: Certainly! May I ask if you're salaried or self-employed?

Jenny: I don't need to give out such information, do I?

Vince: Well, I'd just like to know because it would help us to work out which policy would work best for you.

Jenny: I thought I would just need to pay a certain amount every month for a mutual fund policy.

Vince: That's right! But there are many different kinds of policies you can opt for depending on your financial details and monthly income.

Jenny: Oh, okay. Well, I own a small graphic designing firm and have six employees. I make around \$10,000 a month.

Vince: Thank you for the information! I have a couple of policies which may interest you. Are you interested in a short-term investment, or a long-term one?

Jenny: Well, since this is my first venture with your bank, I would like to know about short-term policies at this time.

Vince: No problem! We have a one-year policy and a three-year one which may interest you. The minimum premium for both is \$250 per month. Which one would you be interested in?

Jenny: Well, please tell me about the one-year policy first.

Vince: I'd be glad to. The policy requires a monthly payment starting from \$250, and you can go up to \$2,000 per month. At the end of twelve months, we assure you a



minimum of 10% return on your investment, which can also go up to a maximum of 90%.

Jenny: But mutual funds are subject to market risks, aren't they? Is it possible that I may lose my money?

Vince: You're absolutely right; there are market risks involved. But we have very thorough policies of investment—we watch the market closely and re-invest your money in other sources if we find that the market seems to be slipping in one area. Our research department ensures that the market is monitored constantly and your money is invested in the most profitable sources that we can find.

Jenny: Okay, that's a relief. So I get at least 10% return at the end of the year.

Vince: That's right. Most of our customers get around 40% return at the end of a year—you're welcome to verify this with our records.

Jenny: That won't be necessary, thanks! I think I'd like to start with a \$250 per month scheme.

Vince: That's wonderful—thank you! May I also interest you in a free life insurance policy, available only to valued customers of National Public Bank?

Jenny: Sure—how do I opt for that?

Vince: It's available at no extra cost to customers who choose our three-year policy. Also, even if you select not to extend your policy at the end of three years, your life insurance will be valid for a period of ten years.

Jenny: That sounds great! But I don't want my money to be stuck in one place for three years. Is it possible to cash in some of it after a year, if I select the three-year policy?

Vince: Absolutely! You're welcome to withdraw funds up to a maximum of 25% of your investment after a period of one year.

Jenny: Sounds great! You can put me down for a three-year policy, then. Could you clarify if this will get me a free life insurance policy?

Vince: It certainly will—thank you! If you like, we can begin processing your policy immediately. We'll need a copy of your passport or driver's license, your current bank statement, and a passport-sized photograph.

Jenny: No problem—I'll come in tomorrow with the documents.

Vince: Thank you very much! For your convenience, I can also send someone across to your office to collect the papers.

Jenny: That would be great! Around 5 p.m. today? Here's my card.

Vince: 5 p.m. would be perfect. Thank you, and welcome to National Public Bank!



Notes

Note that when you are enquiring about specific details, it is not necessary to make small talk when meeting a person face-to-face for the first time. As soon as Jenny enters, she tells Vince exactly why she has come without making any general conversation.

Jenny gets straight to the point since she has come to a help desk, and Vince greets her courteously:

Jenny: Hi, I need some information about personal investments. Have I come to the right desk?

Vince: Sure, I can help you with that! I'm Vince. Please take a seat.

She uses the phrase "I need some information about..." This may also be replaced by similar phrases such as "Could you help me with..." and "I've come to enquire about..." Vince responds by politely introducing himself and asking her to sit down. He could also have said:

*Yes, I can assist you with that! Please sit down.
Yes, that's what I'm here for! Do take a seat.*

Jenny tells Vince what she has come for, and he wants to ask her a few questions:

Jenny: Thank you, Vince. I'm Jennifer Nichols. I'd like to know about the Mutual Funds policies you offer.

Vince: Certainly! May I ask if you're salaried or self-employed?

Jenny: I don't need to give out such information, do I?

Vince: Well, I'd just like to know because it would help us to work out which policy would work best for you.

Using starters for questions such as "May I ask?" makes the question more polite and less direct, especially for sensitive information such as someone's financial background. Jenny is a little uncomfortable at first with giving away such details. She uses a question tag for emphasis by saying, "I don't need to give out such information, do I?" The question tag is the phrase at the end of the sentence which turns it into a question. In this sentence, it is the phrase "do I?" The question tag contains the negative form of the verb used at the beginning of the sentence. Here, the verb "don't" used at the start of the sentence is already negative, so the positive form is used in the tag. The question tag usually indicates that a person already has an opinion, and wants to verify it by wording the question as a statement, and attaching a question tag at the end.

Vince's response Let's Jenny know that she has some choices:

That's right! But there are many different kinds of policies you can opt for depending on your financial details and monthly income.

Vince uses the phrase "you can opt for" to let Jenny know that she has more than one choice. He could have said the same thing differently:

*You can choose from many different kinds of policies.
We can give you many options to select from.*



Jenny is then concerned about the safety of the investment:

But mutual funds are subject to market risks, aren't they? Is it possible that I may lose my money?

Note that Jenny is concerned about some important issues and does not hesitate to ask about them. As a customer at a bank or a place where you are investing your money, it is perfectly acceptable to ask as many questions as you need to, as long as they are worded politely. Note that Jenny again uses the question tag format about to draw attention to her question, letting Vince know her thoughts on the matter. By saying “But mutual funds are subject to market risks, aren't they?” she is letting Vince know that she believes that mutual funds policies are subject to market risks, and by adding the question tag, she is expecting him to confirm or deny the statement. Vince assures Jenny that her money will be safe, and she is relieved:

Vince: Our research department ensures that the market is monitored constantly and your money is invested in the most profitable sources that we can find.

Jenny: Okay, that's a relief. So I get at least 10% returns at the end of the year.

Vince uses words and phrases in a reassuring manner to convince Jenny that her money will be safe with the bank. Note that when Jenny says “So I get at least 10% returns at the end of the year,” she is actually asking a question that is constructed like a statement. Like a question tag, this has the function of drawing attention to the person's existing belief. In a question tag, the person expects the listener to either confirm or disprove the belief. But in a question worded like a statement, the speaker expects the listener to confirm the statement rather than deny it. Jenny could also have said:

*So I am assured of at least 10% returns.
This means I'll get a minimum of 10% returns, doesn't it?*

Vince confirms what Jenny has asked:

That's right. Most of our customers get around 40% returns at the end of a year—you're welcome to verify this with our records.

Here, Vince is letting Jenny know that she need not take his word for the statistics he is quoting, by saying “you're welcome to verify this.” In doing so, he is letting Jenny know that she can cross-check the information he is giving her at any time.

Vince then offers additional information which may interest Jenny:

That's wonderful—thank you! May I also interest you in a free life insurance policy, available only to valued customers of National Public Bank?

Vince also uses the phrase “May I also interest you in...?” to show Jenny that there is some extra information he has for her which may benefit her. Note that he politely asks for her permission to give this information. This may also be stated as follows:

*Would you be interested in a free life insurance policy?
May I also give you more information about a free life insurance policy?*

Jenny then expresses another concern:

That sounds great! But I don't want my money to be stuck in one place for three years. Is it possible to encash some of it after a year, if I select the three-year policy?



Here, Jenny is again voicing her doubts about the policy. She says, “I don’t want my money to be stuck in one place.” The phrase “I don’t want” may be replaced by similar phrases such as “I’m hesitant about...”, “I’m not sure if I want to...” or “I don’t think I’m happy with...”

She asks for a clarification:

Sounds great! You can put me down for a three-year policy, then. Could you clarify if this will get me a free life insurance policy?

Now Jenny is happier about the idea since Vince has explained it to her, but still asks for confirmation to make sure that she has got it right by using the phrase “Could you clarify...” This can also be worded differently:

*Can you please confirm if this will get me a free life insurance policy?
Could you verify if if this will get me a free life insurance policy?*

Vince politely offers to have the documents picked up:

Thank you very much! For your convenience, I can also send someone across to your office to collect the papers.

When Jenny says she will bring the documents the following day, Vince says “For your convenience, I can also send someone across to your office to collect the papers.” He is accomplishing two important things here. By offering to send someone to collect the papers, he is ensuring that Jenny doesn’t change her mind about the policy and submits the necessary documents quickly. Also, he is letting her know, by using the phrase “for your convenience,” that the bank is offering her a free service to show her that she is a valued customer.

Conclusion

In this lesson, we have seen that there are several ways of asking for and confirming information. Information can be requested in a direct or indirect manner, the indirect one usually being more polite, especially at the beginning of a conversation. Confirmation can be requested through question tags, questions in the form of statements, or direct questions.



Checking Back and Confirming Information

Introduction

Talking on the telephone is a skill that you can develop by paying attention to the different things that you have to remember. Many times, you need to take down details like names, addresses and telephone numbers. You should always repeat these details back to the caller and confirm with the caller that you have noted them correctly. This is especially important if you are speaking to someone for the first time. You should take down their name and contact details very carefully and confirm all the details with the caller before ending the call.

Situation 1

Andy Wang has been asked by his boss, the Training Manager, to collect some information on language consultants offering in-company training courses. Andy then phones World Language Centre after seeing the following advertisement in an English language learning magazine. Amy Nassar handles all phone enquiries for World Language Centre. It's very important that she notes down the details of each enquiry very carefully. She has developed several techniques to ensure that she notes down the correct information.

Dialogue 1

Amy: World Language Centre. Amy Nassar speaking. May I help you?

Andy: Hello, I'm phoning about your business English courses. Would it be possible for you to send me some information on them?

Amy: Certainly. Are you interested in our in-company courses or our public courses?

Andy: I'm interested in your in-company training courses, particularly ones which focus on business writing skills.

Amy: Could I ask you how you found out about us? Did you see our advertisement in the newspaper?

Andy: No. Actually, I saw your advertisement in The Language Key.

Amy: Are you a training officer?

Andy: Yes. I'm an Assistant Training Officer.

Amy: OK. We have a brochure giving full details of all our courses. It also includes a brief company profile and our client list. Could I just take down your details?



Andy: *Certainly. My name's Andy Wang.*

Amy: *Is that Wang with an 'a' or an 'i'?*

Andy: *With an 'a'.*

Amy: *And, may I have your company name and address?*

Andy: *Yes, it's Zirrex Ltd.*

Amy: *How do you spell that?*

Andy: *Z - I - double R - E - X.*

Amy: *Z - I - double R - E - S.*

Andy: *No. E - X as in Xerox.*

Amy: *OK ...that's E - X. And your address is?*

Andy: *24th floor, The Guggenheim Building, 3 Gashouse St, Central.*

Amy: *Could you just repeat the building name for me?*

Andy: *The Guggenheim Building.*

Amy: *What is the spelling of 'Guggenheim'?*

Andy: *G - U - G - G - E - N - H - E - I - M.*

Amy: *So that's G - U - G - G - E - N - H - E - I - M.*

Andy: *Yes, that's correct.*

Amy: *Let me repeat your address ... 24th floor, The Guggenheim Building, 3 Gashouse St., Central.*

Andy: *That's right.*

Amy: *Your name is Andy Wang, and your title is Assistant Training Officer.*

Andy: *That's correct.*

Amy: *May I have your contact telephone number, please?*

Andy: *It's 2847 9584.*

Amy: *2847 95*

Andy: *2847 9584.*

Amy: *OK, I've got it ... 2847 9584.*

Andy: *Yes.*



Amy: *OK Mr Wang. We'll send the brochure to you in the next couple of days. Please do call us if you would like any further information.*

Andy: *Yes, I will. Thanks very much. Good-bye.*

Amy: *Good-bye.*

Notes

In this dialogue, we heard Amy and Andy using specific words and phrases to ask each other questions. Amy asks Andy to repeat many details, such as the spelling of his name and address, so that she can be sure that she has noted down these details correctly. Let's take a closer look at how she does this.

Andy's first question uses the phrase 'would it be possible.'. 'Would it be possible' is a polite way of asking someone to do something. Andy says:

Andy: Hello, I'm phoning about your business English courses. Would it be possible for you to send me some information on them?

Let's look at a few more ways to use this phrase. Practice the following sentences:

*Would it be possible for you to send us a sample?
Would it be possible for you to fax the quote to us today?
Would it be possible for you to give us a demonstration?*

Amy then asks Andy to clarify what he wants to know, so that she can be sure that she is giving him the correct information. She asks:

Are you interested in our in-company courses or our public courses?

Next, we see Amy using the phrase 'Could I ask.' 'Could I ask' is another polite phrase that you can use while asking for information. Let's have a look at a few more ways of using this phrase.

*Could I ask where you're calling from?
Could I ask how much you charge for a course?
Could I ask how many students are in each class?*

Asking someone to repeat information is very important. Even if you think you have noted the details correctly, you should confirm the details with the caller just to be sure that you have taken them down correctly. Amy asks Andy to repeat certain types of information. She says:

Could you just repeat the building name for me?

Let's look at some more ways to use the phrase 'Could you repeat'?

*Could you just repeat that address for me?
Could you repeat your telephone number, please?
Could you repeat that more slowly, please?*

Amy then asks Andy to spell a word, and repeats the spelling herself to make sure that she has got it correctly. Let's see that once again:



Amy: *What is the spelling of 'Guggenheim'?*

Andy: *G - U - G - G - E - N - H - E - I - M.*

Amy: *So that's G - U - G - G - E - N - H - E - I - M.*

Andy: *Yes, that's correct.*

Amy: *Let me repeat your address... 24th floor, The Guggenheim Building, 3 Gashouse St., Central.*

Amy also begins questions with the polite phrase 'May I have'. She says:

May I have your contact telephone number, please?

You can use 'May I have' to make a question sound more polite. Practice asking the following questions:

May I have your address, please?

May I have your order number, please?

May I place you on hold?

At the end of the conversation, Amy confirms that she will send Andy the brochure. She also asks him to be sure to call back if he needs any more information. She says:

Please do call us if you would like any further information.

This is a good way to end a call with a caller who has been asking for information.

Situation 2

This telephone conversation is between Jimmy Cheung, a customer service representative at Xpress Web solutions, and Liz Yang, a client who wants to renew her company subscription. Make a note of the way in which Jimmy asks for details and confirms them.

Dialogue 2

Jimmy: *Xpress Web solutions, Jimmy Cheung speaking. How may I help you?*

Liz: *Hi, this is Elizabeth Yang from Kowloon Travels and Tours. I'm calling about renewing our website subscription.*

Jimmy: *When is your renewal due, Ms Yang?*

Liz: *The end of March.*

Jimmy: *May I have your customer identification number, please?*

Liz: *Yes, it's double 9, double 3, 81.*



- Jimmy: 9-9-3-3-8-1. Got it, thanks. Would you like to renew your subscription package for one year?*
- Liz: Yes, that's right.*
- Jimmy: Thanks. That will be \$2,321. Would you like to make your subscription payment by credit card, cheque or bank draft?*
- Liz: Credit card, please. You already have the details. We use the same card every time.*
- Jimmy: Well, I'm afraid we don't save sensitive information on our records. Could you give me the card details again, please?*
- Liz: Certainly. The card number is 4193 2234 6711 0987.*
- Jimmy: Could you repeat that, please?*
- Liz: Sure. 4193 2234 6711 0987.*
- Jimmy: 4193 2234 6711 0987. Is that correct?*
- Liz: Yes, that's right.*
- Jimmy: Is that a Visa card?*
- Liz: No, it's MasterCard.*
- Jimmy: Thanks. Could you also confirm your website's URL, please?*
- Liz: It's www.kowloontravels.com.*
- Jimmy: That's K-O-W-L-O-O-N, right?*
- Liz: That's right.*
- Jimmy: Thank you, Ms Yang. Your subscription has now been renewed up to March 2010.*
- Liz: Thanks a lot.*
- Jimmy: You're welcome. Is there anything else I can help you with?*
- Liz: Actually yes, there is. We've been having a glitch on the product descriptions page.*
- Jimmy: I'm sorry to hear that. Could you tell me exactly what the problem is?*
- Liz: Well, the image for each product is supposed to link to the order form, but not all the links are working.*
- Jimmy: I'll have someone check that and get back to you right away, Ms Yang.*
- Liz: That would be great, thanks.*



Jimmy: *Thanks for calling, and have a great day.*

Liz: *Thanks. Goodbye.*

Jimmy: *Goodbye.*

Notes

Note that Jimmy gives some important details while answering the phone. He gives his company name and his own name, and he also asks, 'How may I help you?' This lets the caller know that they have reached the right number, and that he is there to help them with their query.

Liz then tells Jimmy why she is calling. She uses the words 'I'm calling about'. Let's have a look at that again.

I'm calling about renewing our website subscription.

You can use phrases like 'I'm calling about' and 'I need some information on' to tell the other person why you are calling. Let's practice a few sentences using these sentence structures.

I'm calling about purchasing an extended warranty for my computer.

I'm calling about the order we placed with you last month.

I'm calling about my savings account with your bank.

I need some information on your products and services.

I need some information on a course I'd like to attend.

I need some information on your new range of exercise machines.

Jimmy uses the phrase 'Would you like to' to check what kind of subscription Liz wants. Let's listen again to how he asks this question. He says:

Jimmy: *Would you like to renew your subscription package for one year?*

It's much more polite to say "would you like" than "do you want."

Let's practice asking for details using the phrase 'Would you like to'. Practice asking these questions:

Would you like to know more about this product?

Would you like to call back later with the details?

Would you like to receive these details by email, fax or post?

You can use the phrase 'I'm afraid' if the caller asks for something you cannot do, or if they ask a question you can't answer right away. Here's how Jimmy uses the phrase. He says:

I'm afraid we don't save sensitive information on our records.

Practice saying the following sentences that use the phrase 'I'm afraid':

I'm afraid I'll have to get back to you on that.

I'm afraid we don't make that model anymore.

I'm afraid that offer has now expired.



Jimmy also asks questions beginning with the phrase 'Could you'. We use 'could you' when we want to make a polite request. It's more polite to you 'could you' than 'can you' or 'will you.' Let's see again how Jimmy does that.

Could you give me the card details again, please?

Could you repeat that, please?

Could you confirm your website URL as well, please?

Let's practice asking a few more questions using the phrase 'Could you'. Note that it is polite to also add the word 'please' at the beginning or end of the sentence.

Could you repeat that, please?

Could you please tell me your company's name?

Could you please confirm your date of birth?

Once the caller is satisfied, you should also confirm if they would like any other help. For example, Jimmy asks:

Is there anything else I can help you with?

Here are a few more questions you can ask using the phrase 'Is there anything else'. Now your turn:

Is there anything else you would like to know?

Is there anything else I can clarify for you?

Is there anything else you'd like me to help you with?

Is there anything else I can do for you?

Additional Dialogue Transcript

Johnny: Axis Software, Johnny Tan speaking. May I help you?

Linda: Hi, I'd like to buy the latest version of Photoshop, please.

Johnny: I can certainly help you with that. May I have your name, please?

Linda: This is Linda Osaka.

Johnny: And you're calling from...?

Linda: Westport. The software is for private use.

Johnny: Thank you, Ms Osaka. The new version of Adobe Photoshop CS4 costs US\$999, and the cost is US\$349 if you are upgrading.

Linda: I'd like a new package, please.

Johnny: Thank you for the confirmation, Ms Osaka. May I have your telephone number, please?

Linda: Yes, that's 355-475-8987.



- Johnny: 355-475-8987. Is that correct?
- Linda: Yes, that's right.
- Johnny: Could you also give me your billing address?
- Linda: 42, Garden Apartments, 345 Pycroft Lane, Westport.
- Johnny: Could you repeat that, please? 42, Garden Apartments...?
- Linda: 345 Pycroft Lane, Westport.
- Johnny: Got it, thanks.

Grammar Focus – Using Modal Verbs to Make Polite Requests

Could, Would and May

When talking to someone on the telephone, especially when talking to clients and customers, it's important to sound as polite as you can when making requests. We can combine modals verbs such as 'may,' 'could,' and 'would' with main verbs to form polite questions to ask for and check information.

Let's see how we form a question with these modal verbs:

Modal Verb	+ Subject	+ Main Verb	+ Object
May	I	help	you?
Could	you	repeat	your name?

If you need to get information from a caller, we can use these phrases:

Could you?
 Would you.....?
 May I.....?

Practice these questions:

Could you give me your name?
 Could you repeat your company name?
 Would you spell that for me?
 Would you say that again?
 May I have your credit card number?
 May I have your address?

To make these sentences even more polite, we can add please to the start or the end of a sentence.

Could you give me your name, please?
 Please could you repeat your company name?



Would you spell that for me, please?
Please would you say that again?
May I have your credit card number, please?
Please may I have your address?

Would you mind + gerund

We use the phrase would you mind followed by the gerund when asking for information in a particularly polite manner. We can use the phrase in the following structure:

Would you mind	+ Gerund	+ Object
<i>Would you mind</i>	<i>saying</i>	<i>that again?</i>
<i>Would you mind</i>	<i>explaining</i>	<i>the problem?</i>

We can use please in these sentences, but we can only place it at the end of a sentence, not at the beginning.

Now practice these sentences

Would you mind spelling that for me?
Would you mind repeating your name?
Would you mind explaining the problem, please?

Language Focus – Using Questions Rather Than Statements

When you want information from your caller, it's always better to use questions rather than statements. Questions sound more polite. Nobody wants to be instructed or commanded to say or do something.

Here are a few pairs of questions and statements, each showing you different ways of saying the same thing:

Tell me your name.
Could you tell me your name, please?

I can help you.
How may I help you?

Spell that again, please.
Could you spell that again, please?

You'll be paying by cheque or credit card.
Would you like to pay by cheque or credit card?

Your contact number is.
May I have your contact number, please?

Just hold for a minute.
Would you mind holding for a minute?

Doesn't the question format sound so much more polite than the statement format in each case?



Remember to use question structures using the modal verbs 'may', 'would' and 'could' to make polite questions while checking and confirming details.



Enquiries and Requests

Introduction

In this lesson, we're going to look at how to respond to telephone enquiries, and how to handle requests from callers.

To respond properly to enquiries, you should be able to answer the caller's questions and give them the information they are looking for. To handle requests, you should be able to tell the caller what you will do to fulfil their request, and when you will do it.

We will also look at what you can say when you are unable to help callers fulfil their requests.

To handle enquiries or deal with requests in a polite and efficient manner, it's a good idea to become familiar with some common functional expressions. We'll introduce you to some of these expressions in the lesson.

Situation 1

Anna is a Sales Executive at a showroom which sells cameras. Let's see how she handles a telephone call from Daniel, a caller who has an enquiry and a request.

Dialogue 1

- Anna: Good morning, Camera City. This is Anna. How may I help you?*
- Daniel: Hello, this is Daniel Wang calling from Image Studios. I'd like to enquire about ordering twenty handy cams, please.*
- Anna: Certainly. Do you have a particular model in mind?*
- Daniel: Yes, I'm interested in the Sony HDR-TG1.*
- Anna: The Sony HDR-TG1 – just a minute. Yes, this model costs US\$998, and we can offer you a discount of seven per cent for bulk purchases.*
- Daniel: Could you send me a quote, please?*
- Anna: Certainly. Would you prefer to receive the quote by email, fax or post?*
- Daniel: Fax, please. The number is 310-789-3450.*
- Anna: Could you repeat the number, please?*
- Daniel: Sure. That's 310-789-3450.*
- Anna: 310-789-3450. And that's Daniel Wang, from Image Studios. Is that correct?*



- Daniel: That's right.*
- Anna: I'll fax you the quotation for twenty units within the next fifteen minutes, Mr Wang. Is there anything else I can help you with?*
- Daniel: Yes, could you also tell me when you'd be able to deliver if we place an order today?*
- Anna: Certainly. May I call you back with this information?*
- Daniel: Sure.*
- Anna: Thank you. Could I have your phone number, please?*
- Daniel: The phone number is the same as the fax, and my extension is 106.*
- Anna: Extension 106. Thank you, Mr Wang. I'll fax you the quote right away, and call you in about thirty minutes with the estimated delivery date.*
- Daniel: Thanks.*
- Anna: You're most welcome, and have a nice day.*

Notes

In this dialogue, we see that Anna gives detailed and useful information to Daniel. Let's see again how she answers his first question, when he says: 'I'd like to enquire about ordering twenty handy cams, please.' Anna responds by saying, 'Certainly. Do you have a particular model in mind?'

Anna could have answered this question in other ways. Practice these model responses:

I'd be happy to give you this information, Mr Wang. Could you tell me which model you have in mind?

Certainly, Mr Wang. Would you like me to send you a brochure with the product details?

I'm happy to help you with that, Mr Wang. Which model are you interested in?

I'm glad to help you with that, Mr Wang. Would you like me to email you our brochure and price list?

When giving Daniel the information he wants, Anna also gives him extra information that is useful to him. She says, 'this model costs US\$998, and we can offer you a discount of seven per cent for bulk purchases.' Giving information about discounts and special prices for sales enquiries gives you a better chance of making a sale.

Next, we see that Anna knows about various ways to send the information that Daniel wants, and asks him how he wants her to send it. She asks him: 'Would you prefer to receive the quote by email, fax or post?' Let's have a look at other ways of saying this.

Would you like to receive this information by fax?

Shall I fax you the details, or would you like a hard copy by post?

Would you like me to email you this information?

Shall I send you the details by email, fax or by post?



You may often have to ask a caller to repeat important information such as their name, address or telephone number. It is always better to ask them to repeat important details, so that you can be sure that you have noted them down correctly. Anna asks Daniel to repeat his fax number by saying, 'Could you repeat the number, please?' She then repeats the number back to confirm that she has noted it down correctly. There are many ways in which you can ask for such information. Let's look at a few of them. Practice asking these questions:

Could you say that again, please?
Could you please repeat the number?
Could I have that address again, please?
Could you confirm the address again, please?

When you need some time to give the caller the details they have asked for, you can ask them if you can call them back. It is more polite to ask if you can call back, rather than saying that you will call back. When Daniel asks for the delivery date, Anna responds by saying: 'May I call you back with this information?' Here are some other ways of saying the same thing. Practice asking these questions:

Can I call you back later this afternoon with this information?
Would it be okay to call you back with the details?
Could I call you back in a few minutes with this information?
Can I call you in a few minutes with the details?

Anna asks for Daniel's phone number by saying, 'Could I have your phone number, please?' Remember that questions always sound more polite than statements. It is better to ask for someone's number rather than say, 'Please give me your number.'

Anna ends the call by saying: 'I'll fax you the quote right away, and call you in about thirty minutes with the estimated delivery date.' At the end of the call, you should confirm what you are going to do and when you're going to do it. Don't use vague terms like "I'll call you back." Be specific and say when you'll call back. For example you could say:

I'll call you back after lunch.
I'll call you in a few minutes.
I'll get back to you this afternoon.

Situation 2

Sometimes, you may not be able to help a caller with a request. In this case, you should apologise for not being able to help, and tell the caller how they can get the information they want. Here's a conversation between Tony, a network executive at a telecoms company, and Susan, a caller who has a request concerning the service she receives from the company.

Dialogue 2

Tony: Good afternoon, this is Tony Leung. May I help you?

Susan: This is Susan Cheung. I'm calling because I'd like to change my rental plan.

Tony: I'd be happy to help you with that, Ms Cheung. Could you give me your customer account number, please?



Susan: Just a minute... yes, that's 48499381.

Tony: 48499381. Thank you. What plan would you like to change to, Ms Cheung?

Susan: Well, I'd like the plan with unlimited local calls, and I would also like to activate my voicemail.

Tony: I'm afraid I can't activate your voicemail since this is the Billing Department. I'd be happy to give you the number of the Voice Services Department.

Susan: Can't you ask them to do it for me?

Tony: Unfortunately, you need to confirm your request for voice mail activation in person. Would you like the number of the department?

Susan: Yes, thanks.

Tony: Please call 310-777-7000.

Susan: Got it, thanks.

Tony: Also, I'm very sorry, but I just checked your records – we are unable to place a request to change your rental plan at this time, since you requested an annual package.

Susan: What does that mean?

Tony: Well, your current package expires in January 2009, after which we will be happy to change your scheme if required.

Susan: Oh, okay.

Tony: If you like, I can call you back in four weeks and confirm your request to change your rental plan.

Susan: Yes, could you please do that?

Tony: Thank you. Your alternative contact number is 310-3354-8756, is that correct?

Susan: Yes, that's right.

Tony: Thank you, Ms Cheung. I'm sorry I couldn't be of more assistance today, and I look forward to assisting you next month.

Notes

In this dialogue, we see that Tony is unable to help Susan with both her requests, but gives her information which is useful to her.

Always ask questions politely and clearly. Let's listen again to how Tony asks his caller for information about her account. He says: 'Could you give me your customer account number, please?' Here are other ways of asking for information. Practice these phrases:



Could I have your password, please?
Could you give me your postal address, please?
Could I have your fax number, please?
Could you give me your telephone number, please?

Since Tony cannot help Susan with her request, he apologises and tells her why he cannot help her. Let's have a look at how he does that. He says: 'I'm afraid I can't activate your voicemail since this is the Billing Department.' A useful sentence structure you can follow is to begin with a phrase like 'I'm afraid,' 'I'm sorry,' or 'Unfortunately' and use the word 'since' or 'because' to tell the caller why you can't help them. Let's practice saying you are unable to do something.

I'm afraid I can't help you with that, since we don't handle sales enquiries at this department.
I'm very sorry, but I can't do that because your account has been suspended.
Unfortunately, I can't take your order right now, since that product is out of stock.
I'm very sorry, but I can't confirm the status of your order at the moment, because our system is down.

Tony also gives Susan a suggestion that will help her, by saying: 'I'd be happy to give you the number of the Voice Services Department.' When you are unable to help a caller, it is useful to give them advice or suggestions on how they can fulfil their request.

Tony also gives Susan a time frame in which her request can be fulfilled. He does this by saying, 'If you like, I can call you back in four weeks and confirm your request to change your rental plan.' This shows Susan that Tony is interested in helping her, and that he will be able to do so in the future. Here are a few more ways in which you can say this.

Would you like me to call you back next month to complete your request?
Shall I call you in January to confirm if you would like to change your plan?
We can contact you again in four weeks to help you with your request.
I'd be happy to call you next month and help you with your request.

At the end of the call, Tony apologises again for being unable to help Susan, and confirms in a positive way that he can help her in the future. He says: 'Thank you. Ms Cheung. I'm sorry I couldn't be of more assistance today, and I look forward to assisting you next month.'

Conclusion

In this lesson, we looked at various ways to handle frequently asked questions in telephone enquiries and requests.

Remember to always talk in a friendly and polite way, and to confirm important details like names, addresses and phone and fax numbers. If you can't help the caller, apologise and give the caller advice or suggestions on what they can do.

Always end the call in a positive way by confirming what you will do next.

Additional Dialogue Transcript

Mark: Good morning, Miracle Labs, this is Mark. How may I help you?



Sally: Hi Mark, this is Sally Cho from Dr Ling's nursing home. I'd like to enquire about placing an order for five thousand XV syringes.

Mark: I can certainly help you with that, Ms Cho. Do you have a customer account number?

Sally: No, this is our first order with you.

Mark: Thank you. May I have your address and telephone number, please?

Sally: That's Dr Ling's nursing home, 22 Camak Street, Taipei 45671. And the number is 222-4563.

Mark: Is the road spelt 'K-A-M-A-K'?

Sally: No, that's 'C-A-M-A-K'.

Mark: Thank you, Ms Cho – would you mind repeating the number again, please?

Sally: Yes, that's 222-4563.

Mark: 222-4563. Got it, thanks. Can I send you a quote by fax for your order, Ms Cho?

Sally: Sure. The fax number's 222-4522.

Mark: 222-4522. Thank you. To confirm, you'd like to place an order for five thousand XV syringes. Is that correct?

Sally: That's right.

Mark: Thanks, Ms Cho. I'll fax you the price quote in the next few minutes.

Sally: Great, thanks.

Mark: Thank you for calling, and have a nice day.

Grammar Focus: Direct vs Indirect Questions

When asking a caller for information, it's polite to use indirect questions. Compare this direct question with the same question formed indirectly:

DIRECT QUESTION:

What is your telephone number?

INDIRECT QUESTION:

Could you tell me what your telephone number is?

We form an indirect question by adding a question phrase to the start of the sentence. Notice also that in an indirect question there is a change to the normal word order of a direct question. In the



direct question above, the verb comes immediately after the question word, i.e. What is.... In the indirect question, the verb comes at the end of the sentence.

Indirect questions are more difficult to form than direct questions, but if you want to sound polite, you need to know how to form them. Asian speakers of English, in particular, tend to sound very direct because they only use direct questions. It is important, however, for anyone working in a customer service position to use polite language when making requests.

The most common phrases that we add to direct questions to make them sound polite are:

Could you tell me.....?
May I ask....?
Do you know...?
Do you happen to know....?
I'd (just) like to know.....

Here are some example sentences:

Could you tell me what your new contact number is?
Could you tell me when your connection stopped working?
May I ask when you first noticed the problem?
Do you know which customer service representative spoke to you when you called us last week?
Do you happen to know when you purchased the item?
I'd just like to know where you found out about us.

Language Focus: Declining a Request

When you tell a caller that you are unable to help them or grant their request, you need to do this as politely as possible. Don't just say 'No' or 'I don't know.' In addition, if you can't personally help, you should try to give the caller some useful advice and suggestions.

So instead of saying:

I can't help you with this.

You would say:

I'm afraid I can't help you with this.

And follow it with some practical advice. By giving the caller some practical advice, it lets them know that as a customer or potential customer, you are interested in them.

You can use words and phrases like 'I'm sorry', 'I'm afraid' and 'unfortunately' to apologise for not being able to help the caller. To give advice and suggestions, begin your sentence with phrases like 'Shall I give you', 'You could try' and 'You may want to' and 'Would you like to'.

Here are more examples of declined requests, followed by practice advice or suggestions:

I'm very sorry, but I can't help you with that. You could try calling the helpdesk again and asking them for the right department.
Unfortunately, we don't handle that. Please call the travel desk for help with that.
I'm afraid I can't do that. Please contact the sales department for further assistance.



I'm sorry, but we don't handle those requests. The design department may be able to help you with your request.

Language Focus: Offering Help

You can help a caller by offering to do something such as sending them a brochure or a fax with the information they have requested. Here also, you can use question phrases such as 'would you like me to', 'would you like', 'shall I' and 'may I'. Here are some examples of how you can do this:

Would you like me to send you a brochure with this information?

Shall I send you an email with those details?

May I fax you this information?

Would you like to receive a hard copy of this by post?

You can also offer to do something through a statement rather than a question. In that case, you can use helpful phrases like 'I can', 'If I may', and 'I'd be happy to'. Here are some sentences that use such phrases to offer to do something for a customer:

I'd be glad to send a representative to give you a demonstration.

If I may, I'd like to send my associate over with the paperwork.

I'd be happy to send you a brochure with the product descriptions.

I'd be happy to send you more details by email.



Requesting Information

Introduction

Asking for information by phone requires you to become competent at asking questions. This is not as easy as it sounds as there are many different question types and formats. Many people find it difficult switching quickly from one question format to another.

You may be more likely to get the information you want if you give a little consideration to the way in which you phrase your questions. Direct questions are less polite than indirect ones.

Indirect questions are constructed using the direct question preceded by a polite phrase. It is a good idea to use indirect questions early in your telephone conversations and then follow up with more direct questions later. If you are too demanding early on, you are less likely to get what you want.

Situation

Marie Braddock, the Purchasing Director for a large Public Relations company, is calling a potential supplier for some information on ballpoint pens with printed company logos. These are “give-aways” that will be handed out to potential customers at an upcoming exhibition. As she has had a bad experience in the past with a branding company sending poor quality pens, she wants to make sure that the product she gets this time is of excellent quality.

Marie asks to be directed to the correct department. Focus on the phrases she uses to get general information about the products she needs.

Dialogue

Reception: Earthware Logos, good morning. How may I direct your call?

Marie: Yes, good morning. I was wondering if you could put me through to your sales department?

Reception: I'm sorry, Madam? May I ask what you're calling about?

Marie: Actually, I'm trying to get some information about getting some pens logoed for a customer for an upcoming exhibition.

Reception: Are you interested in our logoed office supplies or silk-screened clothing?

Marie: Your office supplies, please.

Reception: Yes, thank you. Just a moment and I will connect you. (slight pause...)

Brandon: Hello, Servicing, this is Brandon speaking.



- Marie: Yes, hello. How are you today?
- Brandon: I'm fine. How may I help you?
- Marie: I'm hoping to get some information on ordering some pens with my customer's logo printed on them.
- Brandon: OK. How many pens did you want to order?
- Marie: Well, that's going to depend on the price, actually. We'd like to get as many as 5,000 possibly.
- Brandon: Well we have two different styles of pens. Generally, for that big an order, people choose the plastic retractable pen with a two-colour logo printed on two sides. Those cost \$2.95 for 10 pens. For 5,000 pens you're looking at approximately \$1,500.
- Marie: And what is the other style?
- Brandon: The other style is a metal retractable and refillable pen, stainless steel with a one-colour logo printed on one side. Those go for \$1.95 each. So roughly \$10,000 for 5,000.
- Marie: Yes, I see. Hmm....well, can you tell me about the quality of the cheaper pens?
- Brandon: It's a standard retractable ballpoint pen, comparable in quality to what you might find in a shop.
- Marie: Yes, well, the issue here is that the last time we ordered pens of this type, the quality was quite poor. Our customer was understandably concerned about having his logo on the side of such a low quality pen.
- Brandon: Yes. Well, for 29 cents a pen, you can't expect top quality. If it's quality you're looking for, I'd suggest going for the stainless steel pen.
- Marie: Could you possibly send me over a sample of each pen so I can show them to my customer?
- Brandon: Mmmm...we generally don't send out samples unless we have an order placed. Maybe you could bring your customer here to have a look?
- Marie: No, I don't think that would work. OK. Great. Just one more question: what's the lead time on your orders?
- Brandon: For the 5,000 plastic pens approximately 2-3 weeks. Roughly the same for the stainless steels as well, though sometimes they can take a bit longer. Would you like me to send you a quote?
- Marie: Not just yet. I'm going to call a few more suppliers first. Thanks very much for the information. Have a nice day, Brandon.



Notes

A receptionist's job is to handle the switchboard and make sure that callers are transferred to the correct department or extension number. This receptionist answers the phone in a professional manner by giving the name of her company followed by a polite greeting:

Earthware Logos, good morning.

Then she adds:

How may I direct your call?

She could have rephrased this in a number of ways:

*Which extension would you like me to transfer you to?
Which department would you like to be put through to?
How should I connect you?*

The verbs 'direct', 'transfer', 'put through', 'connect' all have similar meanings and can be used interchangeably.

Marie, the caller, starts off by making a polite, indirect request:

I was wondering if you could put me through to your Sales Department?

'I was wondering if you could...' is a fixed phrase which is placed before the request. It's best to use this type of polite, indirect request format early on in a conversation, or when you make a difficult or troublesome request.

Here are other ways of making polite, indirect requests:

*Would you mind transferring me to the Sales Department?
Would it be possible for you to put me through to the Sales Department?
Would you mind putting me through to the Sales Department?*

The politeness of a request depends on a number of factors including the situation and who you're speaking to. If the situation is informal and you know the person you're speaking to well, you can use more direct request structures, such as:

*Will you send me that report?
Can you send me that report?*

If you're speaking to a colleague you don't know very well, you can use a polite but neutral request:

*Could you please send me that report?
Please would you send me that report?*

If you're speaking to a subordinate, you can turn the request into a command. Commands are the most direct forms of requests:

*I'd like you to send me that report.
Please send me that report.*



In most situations in business, however, you should use a polite request format. Never issue a command to a customer, colleague or superior. This would be regarded by native English speakers as rude and offensive.

Now let's return to the telephone conversation.

It's important for a receptionist to ask about the nature of a call so that they can direct the call to the correct person or department. This receptionist uses an indirect question format to sound more polite.

May I ask what you're calling about?

You can make a question indirect by placing certain phrases before the question. For example:

Is there a post office near here?

Becomes

Do you know if there's a post office near here?

Are you hiring any staff at the moment?

Becomes

Could I ask if you're hiring any staff at the moment?

How much does your training course cost?

Becomes

I'd just like to know how much your training course costs?

Marie goes on to explain why she's calling. She says:

I'm trying to get some information about getting some pens logoed for a customer for an upcoming exhibition.

Here are some other ways of saying why you're calling:

I'm calling to get some more information....

The reason I'm calling is to get some more information....

Before the receptionist connects the caller she asks her a further question to check she's got the correct extension:

Are you interested in our logoed office supplies or silk-screened clothing?

In business, it's good practice when you answer an extension to first give the department you work for followed by your name:

Hello Servicing, this is Brandon speaking.

It's also common to add:

What can I do for you?



*How may I help you?
May I help you?*

Marie repeats the reason she's calling:

I'm hoping to get some information on ordering some pens with my customer's logo printed on them.

Notice that that the gerund form of the verb – ordering – is used after a preposition.

Here are some other examples of gerunds following prepositions:

*I'd like to get some information about ordering some pens...?
I was thinking about enrolling on a writing course.
I'm interested in purchasing some of your products.*

It's quite normal when requesting information on the phone to start by using polite requests. Then as the conversation develops you can become more direct. Later in the conversation Marie makes more direct requests:

*And what is the other style?
Can you tell me about the quality of the cheaper pens?
What's the lead time on your orders?*

It is only when she has to make a more difficult request that she reverts to the polite, indirect request format:

Could you possibly send me over a sample of each pen so I can show them to my customer?

She uses this format because she is asking for a big favour.

Here are some other ways she could have made this request:

*Would it be possible for you to send me over a sample of each pen so I can show them to my customer?
Is there any possibility you could send me over a sample of each pen so I can show them to my customer?
I was wondering if you could send me over a sample of each pen so I can show them to my customer?
Would you mind sending me over a sample of each pen so I can show them to my customer?*

Note that 'Would you mind' is followed by the gerund.

So to summarise, generally speaking, the more indirect the expression you use, the more polite you will seem. If you are too direct you may be considered impolite. However, the more indirect expressions can sound "too polite". When deciding which expressions are suitable for which situations it is useful to ask certain questions.

What is the relationship between the speaker and the listener? More direct expressions are often used between friends or when the speaker is in a position of authority.

How important is the action to the speaker? Usually, the more important the action, the more indirect the expression.



How much inconvenience will the action cause for the listener? If, for example, the listener is being asked to make a lot of effort or do something which they do not usually do, the speaker will probably use a more indirect expression

Additional Dialogue Transcript

- B: I'm calling because I'm interested in joining the Saturday English Club. I'd just like to confirm a few things before joining.*
- A: That's fine. What would you like to confirm?*
- B: Well, in your advert you don't mention the level of the classes. Could you tell me if the classes will be of mixed ability?*
- A: Yes, they will. However, the average level of our members is quite reasonable.*
- B: And there was no mention of whether the classes were for children, or adults, or both? I'd just like to know if the Club is for adults only.*
- A: Most of our members are adults working in business. However, there are also a small number of Form 7 students. The age limit for Club classes is 16.*
- B: According to the information in your website, you say that members will never miss a Club class if they want to attend. Could you tell me what happens if all the classes are full?*
- A: If the scheduled classes are full, we'll run extra classes during the afternoon. Provided that you're also free in the afternoon, we will be able to place you in a class.*
- B: Okay. Can you confirm that all the Club teachers will be native English speakers?*
- A: Yes, all our teachers are native English speakers. They are also qualified TEFL teachers.*
- B: Good. I also wanted to ask whether the lessons will be structured or just free talk?*
- A: The classes will be informal but they will be structured. The teacher will follow a lesson plan and there will be vocabulary handouts.*
- B: That's good. Just a couple more questions if you don't mind.*
- A: No, that's fine.*
- B: My company would be paying for this and they'd need a record of my attendance. Could this be arranged?*
- A: Yes, certainly. Members need to sign in when they arrive for a Club class, so we'll have a record of your attendance. Your company can request this from us at any time.*
- B: Can you just confirm that membership is HK\$1,499?*



A: *Yes, that's right.*

B: *And membership lasts for six months, doesn't it?*

A: *Yes, for six months.*

B: *And finally, where exactly are you located?*



Dealing with Persistent Callers

Introduction

Persistent callers are people who keep calling until they can speak to a certain person. It may be your job to answer the phone and speak several times to the same caller. The caller may be trying to sell something, or may want to talk to someone in your office for a specific reason.

Even if the same person calls many times, you should speak to them politely but firmly. There are many ways in which you can politely tell a caller that they do not need to call again, or that they can leave a message for the recipient.

In this lesson, we will look at how to use specific words and phrases to deal with persistent callers.

Remember that you need to remain polite and patient while talking to callers, even if they call many times.

Situation 1

Read through the following telephone conversation between Sandra, a secretary, and Paul, a persistent caller.

Dialogue 1

Secretary : *Axis Systems. May I help you?*

Caller : *Yes. I'd like to speak to June Chang, please.*

Secretary : *May I know who's calling?*

Caller : *This is Paul Davis from Cybertech Ltd.*

Secretary : *I'm sorry, Mr Davis. Ms Chang is in a meeting at the moment.*

Caller : *Can you ask her to call me back on 2162 6276 when she's finished?*

Secretary : *OK. That's Paul Davis on 2162 6276. I'll pass on the message.*

Caller : *Thanks.*

Notes

In this dialogue, we can see a number of ways to answer the phone politely. Let's see again how Sandra answers the phone.

Axis Systems. May I help you?



'May I help you' and 'How may I help' you are good ways to let the caller know that you are there to help. Sandra also asks for the caller's name. She says:

May I know who's calling?

'May I know' is a useful and polite phrase to use when asking a caller a question. It is more polite than asking 'What is your name?' or saying 'I need your name.'

Let's listen again to how Sandra tells Paul that her boss cannot take his call. She says:

I'm sorry, Mr Davis. Ms Chang is in a meeting at the moment.

Here are some other ways to politely tell a caller that the person they want to speak to cannot take their call.

I'm very sorry, but he's unavailable right now.

I'm sorry, but she can't come to the phone at the moment.

I'm sorry. She's busy in a meeting right now.

I'm sorry. He's out of the office at the moment.

Sandra ends by confirming the caller's contact details, and also assures him that she will give her boss his message. She says:

That's Paul Davis on 2162 6276. I'll pass on the message.

By confirming the details, Sandra shows the caller that she is interested in his call and wants to help him.

Situation 2

Here's a second conversation between Sandra, a secretary, and Paul, a persistent caller.

Dialogue 2

Secretary : *Axus Systems. May I help you?*

Caller : *Hello, this is Paul Davis again. I called earlier for June Chang. Has she come out of her meeting yet?*

Secretary : *Not yet. I believe it's an all-day meeting. Don't worry, Mr Davis. I'll tell Ms Chang you've called as soon as she's available.*

Caller : *Perhaps I should call again at about 5 o'clock.*

Secretary : *No, that won't be necessary. I'll see that she gets the message.*

Caller : *Right. Thanks a lot.*



Notes

In this dialogue, Sandra answers the phone as before. She again tells the caller that she will pass on his message. She says:

Don't worry, Mr Davis. I'll tell Ms Chang you've called as soon as she's available.

When Paul offers to call back, Sandra tells him politely that he does not need to do so. Let's listen again to how she does that. She says:

No, that won't be necessary. I'll see that she gets the message.

Let's have a look at a few more ways of politely telling a caller that he or she does not need to call back.

I don't think you need to call back. He'll call you.

It won't be necessary for you to call back. She'll call you.

No, that's not necessary. He'll get back to you soon.

No, it won't be necessary for you to call back. She'll call you soon.

Situation 3

Let's take a look at a third conversation between Sandra, a secretary, and Paul, a persistent caller.

Dialogue 3

Secretary : Axis Systems. May I help you?

Caller : Yes. This is Paul Davis again. I called yesterday for June Chang. Is she around at the moment?

Secretary : She was earlier, but she's just popped out of the office. I have left your message with her, so I'm sure she will contact you when she has time.

Caller : Fine. Can you tell her I'll be in the office until around 6?

Secretary : I will. Thanks for calling, Mr Davis.

Notes

Let's see how Sandra responds when Paul calls for the third time.

This time Sandra says that Ms Chang is not in the office. Let's see that again:

She's just popped out of the office.

If you "pop out" you leave a place for a short time.



Sandra also confirms that she has given Paul's message to her boss. This shows the caller that she has remembered to talk to Ms Chang about his call. Sandra says:

I have left your message with her, so I'm sure she will contact you when she has time.

Here are a few responses that can show the caller that you have delivered his or her message.

*I gave your message to him, and he will call you back soon.
I told him you called, and he said he would get back to you.
I left your message for her, and I'm sure she'll call you back soon.
I've given her your message, and she'll contact you soon.*

While ending the call, Sandra politely thanks Paul for calling. Thanking someone for calling is important. Here are a few more ways of ending a call.

*Thanks for calling.
Thank you for calling, and have a nice day.
Thank you for your call, and have a great day.*

Situation 4

Here's a fourth and final conversation between Sandra, a secretary, and Paul, a persistent caller.

Dialogue 4

- Secretary :* *Axus Systems. May I help you?*
- Caller :* *Hello. Paul Davis again. June Chang didn't call me back. I was just calling on the off-chance that she could spare a couple of minutes and talk to me now.*
- Secretary :* *I'm sorry Ms Chang was unable to contact you, Mr Davis. She's been very busy recently. And, I'm afraid Ms Chang will be in a seminar for the rest of the week. She said she would definitely contact you with a decision either on Monday or Tuesday next week.*
- Caller :* *OK. I'll call her sometime at the start of next week, then.*
- Secretary :* *No. That won't be necessary. She assured me that she'd be the one to contact you.*
- Caller :* *Well. Tell her I'll be in the office waiting for her call. Thanks very much for your help.*
- Secretary :* *Not at all. Goodbye.*

Notes



When Paul calls for the fourth time, Sandra has to tell him why Ms Chang has not returned his calls. She also has to assure him again that Ms Chang will call him back.

This time Sandra apologises that Ms Chang has not called Paul yet, and says that her boss has been very busy. Let's have a look at that again.

I'm sorry Ms Chang was unable to contact you, Mr Davis. She's been very busy recently.

Sandra also tells Paul that Ms Chang will not be available for the rest of the week. She says:

I'm afraid Ms Chang will be in a seminar for the rest of the week. She said she would definitely contact you with a decision either on Monday or Tuesday next week.

When Paul offers to call back, Sandra tells him that it will not be necessary, and that Ms Chang will call him herself. She says:

No. That won't be necessary. She assured me that she'd be the one to contact you.

Let's practice this a little more.

I'm sorry she was unable to contact you, but she'll get back to you soon.

I'm sure she'll contact you as soon as she gets back.

She said she would definitely contact you next week.

She assured me she would call you back by the end of the week.

If you assure the caller that your boss will call them back, then the person may not call again. Remember to say that you are sorry that your boss has not had the time to call them back yet, and that he or she has got the caller's message and plans to call back soon.

Conclusion

Dealing with a persistent caller can be a difficult task, but you can manage it well if you know what to say.

Remember to always speak politely, and to tell the caller that it is not necessary for him or her to call back. Also remember to tell the caller that you have given his or her message to your boss. This will show the caller that you are interested in their call.

Let the caller know that you are there to help, and thank him or her for calling at the end of the call.

Additional Dialogue Transcript

Secretary: Good morning, Integra Solutions. How may I help you?

Caller: Hi, I'd like to speak to James Woo, please.

Secretary: May I know who's calling?



- Caller: *This is Ellen Tan from Imagine Networks.*
- Secretary: *I'm sorry, Ms Tan, but Mr Woo is in a meeting at the moment.*
- Caller: *Okay, I'll call back later then.*
- Secretary: *If you'd like to leave your number, I'll ask him to call you back.*
- Caller: *Sure. That's 355-099-7888.*
- Secretary: *Ms Ellen Tan, 355-099-7888. Thank you, Ms Tan. He'll return your call soon.*
- Caller: *When do you think he'll be done with his meeting? I could call back later today.*
- Secretary: *I'm sure that won't be necessary. I'll give him your message at the earliest.*
- Caller: *Oh, okay then.*
- Secretary: *Thanks for calling, and have a good day!*

Grammar Focus – Using the Present Perfect Tense

The present perfect tense shows that an action has recently been completed. It is formed by the auxiliary verbs 'has' and 'have' followed by the past participle of the main verb:

Has/Have + Past Participle

Here are some example sentences:

- She has just stepped out of the office.*
The project managers have been busy all week.
I have given her your message.
I'm afraid he's been busy all week.
Unfortunately, Ms Tam has popped out of the office.
I've passed on your message.

Note that when you use the present perfect tense, you never state when the action happened. This is the key difference between the past simple tense and the present perfect tense. Notice the difference between the following sentences:

- She has just stepped out of the office.*
She stepped out of the office half an hour ago.
- The project managers have been busy all week.*
The project managers were busy last week.
- I have given her your message.*
I gave her your message shortly after you called.
- I'm afraid he's been busy all week.*
I'm afraid he was busy last week.



*Unfortunately, Ms Tam has popped out of the office.
Unfortunately, Ms Tam popped out of the office 10 minutes ago.*

*I've passed on your message.
I passed on your message when Ms Tam's meeting ended.*

Note also that 'has' is used for singular subjects like 'he' and 'she', and 'have' is used for plural subjects like 'they' and 'we', and also after 'I'.

When speaking, we often use short forms. 'He has' becomes 'He's', and 'I have' is shortened to 'I've'. It is more common to use shortened forms when talking on the phone. Here are some more examples which use the present perfect tense with shortened verb forms.

*I've given him your message, and I'm sure he'll call you back soon.
He's been out of the office all week.
She's been caught up in meetings all day, but I'll give her your message when she's free.
She's asked me to let you know that she'll call you next week.
It's been a busy week for her. I'm sure she'll call you back soon though.*

Language Focus – Declining a Request

When talking to a persistent caller, you may have to decline their request to speak to your boss, or to call back later. This should always be done politely so that the caller is not offended.

Here are some polite ways to tell the caller that your boss cannot speak to them at that time:

*I'm very sorry, but she can't speak to you right now as she's in a meeting.
I'm sorry, but he's out of the office at the moment.
I'm afraid he's not at his desk right now.
I'm afraid she's in a meeting and can't take calls right now.
Unfortunately, Mr Simms has just popped out.
Unfortunately, Ms Walton is on a business trip.*

Using the phrases 'I'm sorry,' 'I'm afraid,' and 'unfortunately' before declining a caller's request softens the bad news and makes your sentence sound more polite and friendly.

Often, the caller will say that he or she wants to call back later. You should also try to discourage this by saying that it's not necessary because your boss will return their call. Here are some example sentences:

*No, that's not necessary. She'll call you back soon.
That won't be necessary. He assured me he would be the one to contact you.
I don't think you need to call back. She'll get in touch with you soon.
I don't think it's necessary for you to call again. She said she would call you back.*

After you decline the caller's offer to call back, tell him or her know that your boss plans to return the call. This will let the caller know that it is not necessary for him or her to call your office again.

Language Focus – Expressing Availability



This lesson is all about asking if and when someone is available and replying whether they are available or not.

We can ask about someone's availability directly or indirectly using either a direct question or an indirect question. Indirect questions are more polite than direct questions and are preferable especially if you are making a cold call to a potential customer. If you are a client, on the other hand, direct questions are usually more appropriate.

To form an indirect question, we just add a short softening phrase such as 'I was wondering if' to the start of the sentence. For example:

Is John around? (direct question)
I was wondering if John is around? (indirect question)

Note the change of word order in the above indirect question.

Let's look at a few other ways of asking directly and indirectly about someone's availability:

Is Janet Smith available, please? (direct question)
I was wondering if Janet Smith is available? (indirect question)

Is Mr Hogan free at the moment? (direct question)
I was wondering if Mr Hogan is free at the moment? (indirect question)

Is Paul Franks in his office? (direct question)
I was wondering if Paul Franks is in his office? (indirect question)

Could Mr Lee spare a few minutes to speak to me? (direct question)
I was wondering if Mr Lee could spare a few minutes to speak to me? (indirect question)

So how do we answer questions about availability? We can respond with a negative or positive answer. Remember, if someone isn't available soften the bad news with the phrases 'I'm sorry,' 'I'm afraid,' or 'unfortunately' before declining a caller's request.

We can also use a few key phrases to say if someone is available, unavailable or just busy. Here are some examples:

I'm sorry, Mr Johnston is unavailable.
I'm afraid, Ms Wong isn't free at the moment.
Unfortunately, Roger is tied up for the rest of the day. (tied up = busy)
I'm sorry but Brian is busy right now.
I'm afraid, he's been caught up with meetings all day. (caught up with = busy)



Giving Bad News: Making a Cancellation

Introduction

Often in business things don't go according to plan. Sales fall, meetings are rescheduled, budgets are cut, orders are cancelled, flights are delayed. So just how do we inform our colleagues or customers about bad news? How should we apologise and how should we react to an apology?

In this lesson, we're going to use a telephone conversation between a buyer and a supplier to illustrate some of the common language used when giving and reacting to bad news.

Situation

Andrea Suchy, a clothes buyer for a large shop in London, is calling one of her suppliers, Prebdel Manufacturing in Hong Kong, to cancel a recently placed order.

Because the company has recently declared a profit-warning, the purchasing department is being required to reduce its purchases by 25%. However, the order with Prebdel was placed one week before this and it might be too late to cancel.

In the following telephone conversation, Andrea tries to cancel her order without damaging her business relationship with Prebdel.

Dialogue

- Prebdel: Prebdel, Hong Kong. This is Angela speaking. May I help you?*
- Andrea: Yes, could I speak to Jackson Lau in production, please?*
- Prebdel: Just a moment, I'll transfer you.*
- Jackson: Jackson Lau, can I help you?*
- Andrea: Hello, Jackson, this is Andrea Suchy calling from Zana Fashions in London.*
- Jackson: Yes, hello, Andrea! How's business?*
- Andrea: Well, funny you should ask, Jackson, because there's a problem I'm afraid.*
- Jackson: Oh? I'm sorry to hear that.*
- Andrea: I'm not sure if you've been reading the business news lately but our company has recently declared a profit warning. The situation is this: we're getting a lot of pressure to cut costs this quarter so the news isn't as bad as expected.*
- Jackson: I see. And...?*



- Andrea: So, I'm wondering if we could cancel that order we made last week.*
- Jackson: Well I can certainly understand your situation, but I'm not sure if there's anything we can do. Let me first just pull up your account... Oh, yes. I see it. The order was for 30,000 knits. Wow, Andrea: this order is almost a week old. It's probably in production now. I think you're aware of our policy that we need 48 hours notice to cancel an order.*
- Andrea: Yes, I'm aware of your policy. I do apologise for the trouble, Jackson. We've done so much business with you in the last two years and I'm really hoping that you can call and stop the order. I'd really appreciate it if you could call the factory and see if it's in production already?*
- Jackson: Well... I'll see what I can do, but I can't promise anything. Give me two minutes Are you still there, Andrea?*
- Andrea: Yes, I am. So, what's happening with the order?*
- Jackson: Well, I've got good news and bad news. Which do you want first?*
- Andrea: I'll take the bad news.*
- Jackson: They've already started production.*
- Andrea: Oh! And the good news?*
- Jackson: They've only produced about one third of the order, so I stopped them. So you'll have to take that third of the order.*
- Andrea: OK. We can definitely accept that, Jackson. And, once again, I'm terribly sorry for the inconvenience.*
- Jackson: Well, luckily it was still in the early stages of production. I'm glad we were able to save you taking the full order.*

Notes

The receptionist at Prebdel answers the call with a standard opening. She says:

Prebdel, Hong Kong. This is Angela speaking. May I help you?

She states the name of the company, her name and asks if she can help. Note that it is usually optional for a receptionist to give their name.

Let's practice answering the phone on behalf of a company.

Biotech Ltd. This is Paul speaking. How can I help you?

Granger Cables. How may I help you?

Lionel Vicks Supplies. This is Jack speaking. May I help you?

The caller wants to speak to someone in the company and asks:



Yes, could I speak to Jackson Lau in production, please?

Use the polite request phrases “Could I please speak to” or “May I speak to” followed by the person’s name and the department, if you know it. Note that you can include ‘please’ before the main verb or at the end of the sentence. You can also use the phrase “I’d like to speak to” but this is a little less polite and more direct than “Could I speak to.” Let’s practice using these phrases.

*Could I speak to Jeff Bridges in Sales, please?
May I please speak to Mary Stewart in Accounts?
I’d like to speak to Fred Couples in Marketing, please.*

The receptionist transfers Andrea to Jackson Lee. Let’s see their first exchange again:

*Jackson: Jackson Lee, can I help you?
Andrea: Hello, Jackson, this is Andrea Suchy calling from Zana Fashions in London.
Jackson: Yes, hello, Andrea! How’s business?
Andrea: Well, funny you should ask, Jackson, because there’s a problem I’m afraid.
Jackson: Oh? I’m sorry to hear that.*

Andrea introduces herself to Jackson giving her name and company name. She says:

Hello, Jackson, this is Andrea Suchy calling from Zana Fashions in London.

Andrea knows Jackson so she uses the more informal greeting, “Hello,” instead of “Good morning,” or “Good afternoon.”

After Jackson greets her, she warns him that she has some bad news by saying:

There’s a problem I’m afraid.

It’s normal to break bad news in this way without actually saying what the bad news is. It’s not necessary to state the bad news immediately. Here are some other phrases you could use to break bad news.

*I’m afraid there’s a problem.
I’m sorry but we have a problem.
I’m afraid I have some bad news.*

When someone says they have a problem, it’s important that you react to it in a polite and sympathetic way to show that you are concerned. Jackson responds:

Oh? I’m sorry to hear that.

Even if their bad news may affect your business, you should still say you are sorry to hear it. Here are some other useful phrases you can use to react to bad news.

*Oh, that’s too bad.
Oh, what a shame.
I’m sorry to hear that.
Well, I’m sorry to hear that you’re having problems.*



Before explaining the problem, Andrea uses the phrase “The situation is this.” Let’s see that again:

The situation is this: we’re getting a lot of pressure to cut costs this quarter so the news isn’t as bad as expected.

You can use other phrases such as “Well, you see...,” “It’s a long story, but...” and “The problem is that...” before you state the problem. For example:

*Well, you see, our training budget has been reduced by 40%.
The problem is that we don’t have enough qualified technicians.*

The purpose of Andrea’s call is to cancel an order. Since she is late doing this, she needs to be very polite with her cancellation request. She uses the polite request phrase “I’m wondering if we could.” Here’s what Andrea’s says:

So, I’m wondering if we could cancel that order we made last week.

“I’m wondering if we could” is a useful phrase but make sure you use it in the right Situation. For example, you wouldn’t say “I’m wondering if you could copy this report for me” or “I’m wondering if I could borrow your pen.” Use the phrase when your request is an inconvenience to someone as in the following examples.

*I’m wondering if I could take my annual leave next week.
I’m wondering if you could come to work on Saturday.
I’m wondering if you could do a few hours overtime tonight.*

When someone makes a polite request, we can answer “yes” or “no”. If our answer is “no,” we often use a softening phrase first. Jackson says:

Well I can certainly understand your situation, but I’m not sure if there’s anything we can do.

Jackson doesn’t decline Andrea’s request directly, but he suggests that he may not be able to accept it. Saying “Sorry, but no,” or “I’m afraid you can’t cancel it” would be considered too direct and might offend the customer. So if the answer is likely to be “no,” first show that you understand the customer’s problem and then indicate that there’s only a possibility that you’ll be able to grant the request.

After finding out the details of the order, Jackson says:

I think you’re aware of our policy that we need 48 hours notice to cancel an order.

When declining a request in a business situation, it’s a good idea to remind your customer of your company’s policy. Generally, customers will be aware of the policy and when they hear it quoted to them, they’ll realise that there is little they can do or say to make you change your mind. Jackson could also have said:

*Company policy states that we need 48 hours notice to cancel an order.
According to company policy, we need 48 hours notice to cancel an order.*

Andrea admits that she is aware of the policy but is under a lot of pressure from her company to make cuts. The first thing she does is make a strong apology for the trouble her request might cause. And then she makes another very polite request. She’s really trying hard to get some kind of result. Let’s see that again:



Yes, I'm aware of your policy. I do apologise for the trouble, Jackson. We've done so much business with you in the last two years and I'm really hoping that you can call and stop the order. I'd really appreciate it if you could call the factory and see if it's in production already?

First let's practice apologizing strongly. There are a number of ways you can do this. Practice these sentences:

*I'm terribly sorry for the inconvenience.
I hope this doesn't cause too much of a headache for you.
I do apologize for the trouble.*

Earlier, we looked at the polite request structure "I'm wondering if you could." Now, Andrea uses another polite yet strong request structure. She says "I'd really appreciate it if you could." Only use this phrase if you know that your request will inconvenience someone. Let's practice the phrase.

*I'd really appreciate it if you could complete our order by 30 June.
I'd really appreciate it if you could extend our credit a further 30 days.
I'd really appreciate it if we could postpone our meeting until next week.*

So using soft, indirect language; apologizing; and making polite, yet strong requests all help to put pressure on the person you're speaking with and yet maintain a good business relationship. If you adopt this approach and are careful of the language you use, you are more likely to get the result you want.

Jackson, however, is still unable to say "yes," and continues to use language which indicates "no." However, it's clear that his position is softening a little. He says:

Well... I'll see what I can do, but I can't promise anything.

"I'll see what I can do" is a standard response to a difficult request. The purpose of the phrase is to give you time to make a decision and therefore not to say "no" directly to the customer, which might cause offence. Let's practice responding to difficult requests.

*I'll see what I can do, but I can't promise anything.
I'll have to look into it first but I'm not sure if there's anything we can do.
I'll check but I'm not sure we can do anything.*

Jackson checks with the factory and is able to partially grant Andrea's request. Andrea finishes the conversation by apologizing once again. She says:

OK. We can definitely accept that, Jackson. And, once again, I'm terribly sorry for the inconvenience.

Since she has caused problems for Jackson's company, it's good practice to say sorry again before finishing the conversation. This type of language helps to maintain good business relationships.

Conclusion

In this lesson, we looked at how to give and react to bad news in business situations. Business situations are different to social situations in that you need to be more careful with the language you use, especially in difficult situations which could cause problems for your customer or client.



Generally, the language used in business is more considerate and polite, particularly when making a request which is likely to inconvenience someone and when apologising.

It's a good idea to become familiar with some of the key phrases for common business functions such as requesting, apologising, informing, reminding, etc.

Additional Dialogue Transcripts

Dialogue Transcript 1

Sarah: Hello, is that David?

David: Yes, speaking.

Sarah: Hi, David. I have some bad news, I'm afraid

David: Not too bad I hope.

Sarah: I'm really sorry but we've decided to delay revamping our website until next year.

David: Oh that's a real shame, especially as I'd already started work on it.

Sarah: I'm sorry to hear that, David. But don't you remember we asked you to hold on a few more days until we'd finalised it with the management.

David: Yes, you did. It's just really unfortunate. I'd prioritised this project and informed some of my other clients that their projects would be delayed by a few weeks.

Sarah: I'm terribly sorry for the inconvenience, David. We will definitely use you next year though.

David: OK, no problem. Just let me know when you get a decision next year.

Sarah: I will.

Dialogue Transcript 2

Jack: Alliance Computers. This is Steve Benton speaking. How can I help you?

Emma: Hello. This is Emma Bund from Bell Finance.

Jack: Hello, Emma. What can I do for you?

Emma: I'm afraid we have a problem, Steve.

Jack: Oh. I'm sorry to hear that.

Emma: Well, you see, the management decided this morning to keep our existing PCs for another year. They're trying to reduce costs. So I was wondering if we could cancel our order for 60 desktop PCs that we placed two days ago.



Jack: I can certainly understand your situation, Emma, but you've already signed for the PCs. And as you know, our company policy states that once you've signed for an order, it can't be cancelled.

Emma: Yes, I'm aware of that, Steve. And I'm really sorry for the inconvenience, but since you haven't delivered them yet, we thought you could be flexible with us.

Jack: Well, you have been a good customer over the years. Just a moment. I'll see what I can do, but I can't promise anything. Could you hold the line for a minute? (pause) Emma, are you still there?

Emma: Yes.

Jack: I've got some good news and bad news.

Emma: I'll take the good news first.

Jack: The good news is we can cancel the order. The bad news is there'll be a \$400 cancellation fee due to the admin work that's already gone into getting your order ready. Do you find that acceptable?

Emma: Yes, that's absolutely fine. I totally understand the need for that. Once again, I do apologise for the trouble, Steve. We'll certainly place the same order with you next year.

Jack: That's great. I'm glad I could help.



Buying Time

Introduction

When busy at work, we don't always have time to return calls right away. Many times, too, a colleague or co-worker will ask us to do something and not leave us with enough time. So how can we politely "stall for time"? How can we say politely that we need more time to complete a job?

Situation 1

While John Hunter was out, Paula, an old contact in London, called and left a message for him:

Hi John, this is Paula from London Supplies Ltd. We need some information on companies in Southern China which produce high grade chemical solvents. Can you help? I'll give you a call back later.

John is always happy to help Paula if he can, but he likes to give himself plenty of time.

Dialogue 1

John: Hello.

Paula: Hello, John?

John: Yes.

Paula: It's Paula. Paula Fontaine from London Supplies Ltd.

John: Oh, hello, Paula. I got your message. How are you?

Paula: Well, I'm fine thanks, but under a bit of pressure at the moment. It's the busy time of the year, as you know.

John: Yes, I know what you mean.

Paula: Anyway, I'm hoping you can help me out with something. I need to find out the main producers of high grade chemical solvents in Southern China. It's really difficult to get that sort of information here. I'd be very grateful for anything you can find out.

John: Well, it's going to take some time. I'll get my assistant on to it right away and get back to you as soon as I have some information.

Paula: John, I'd really appreciate it but this really is very urgent. How quickly do you think you can get the information.

John: Well, we'd need to do some research at the Trade Development Council. It'll be closed tomorrow. Would Monday afternoon be too late?



Paula: No, that would be fine. Thanks very much for going out of your way. I'll repay the favour sometime. I promise.

Notes

When asked how she is Paula says:

I'm fine thanks, but under a bit of pressure at the moment.

Paula does this, in part, to let John know that she doesn't have a lot of time. He can expect, then, that she might ask him to do something with a limited amount of time. Then Paula says:

I'm hoping you can help me with something.

This is a way of telling John that she is about to ask for a favour. She might also have said:

*I'm wondering if you can help me out.
I have a favour to ask of you.
Could I ask you to do something for me?*

Then Paula asks John to find out some information for her. John answers:

Well, it's going to take some time.

This might be a little bit too direct in some situations, but since John and Paula seem to know each other quite well, it's probably OK. John could have said:

*I'd be happy to help you, but it might take me a few days.
I can get that information to you in just a couple of days.
Can you give me until Thursday to get that for you?*

John then tells Paula:

I'll get my assistant onto it right away.

The phrase 'right away' means something like immediately or quickly. He might also have said:

*I'll have to check the files.
Let me check on that for you.
I'll look into that for you.
I'll see what I can find out.*

Paula wants to remind John that the information is important and that she needs it quickly. She says:

This is really urgent.

Again, since Paula knows John quite well, this language is probably fine when said with the right tone of voice. If they didn't know each other, Paula would need to be a little more polite by first offering an apology for pressing John:



*Sorry to give you pressure, John, but it is important.
I hate to push you, John, but I need this information as soon as possible.
I apologise for adding to your pressure, John, but this information is very important.*

Apologizing here is a way of telling John that she knows he is busy. Of course, the kind of language you use will depend a lot on the situation. For example, say that Paula made a mistake and forgot to get the information earlier. Then she might go further:

John, I was hoping you could help me out. I totally forgot to add these figures, so I'm behind now. Would it be at all possible to get this information to me by this afternoon? It would really help me out a lot.

Now what Paula does here is explain a little bit more so that John understands the situation better. In general, the MORE words used in a request, the more polite the request is.

John asks Paula if he can give her the information the following week:

Would Monday afternoon be too late?

He could also have asked:

*Would it be OK if I emailed that to you next week?
I'm afraid I won't be able to do that today. Can I send the figures to you tomorrow?
Sorry but today I have too much going on. Can you wait until Monday?*

Paula then tells John that Monday would be fine and thanks him.

There are many ways of thanking someone and part of it will depend on the situation and the relationship you have with the person you are thanking. Generally speaking, the bigger the favour and the more distant the relationship, the more words you need to use. The less formal and closer the relationship the fewer words you need to use.

Here are some ways of saying 'thank you', from a casual way, as you might say to your friend, to a more formal way, as you might say to your boss or client:

*Thanks.
Cheers.
Thanks a lot.
Thanks for that.
Thanks, I appreciate it.
Thank you very much. I appreciate it.
That is so very kind of you. I really appreciate what you've done.
I'd like to tell you thank you for all that you've done for me. It's really appreciated.*

Situation 2

Janet Wong receives a message on her desk when she returns from lunch.

*Mr Martin would like information on historical trading prices for two Shanghai-listed stocks.
Please call him before 3.30 today.*



Dialogue 2

Olivier: Allied Systems, this is Olivier speaking.

Janet: Oh, hi, Olivier! This is Janet Wong from Barter-Klein Trading.

Olivier: Yes, hi, Janet. Thanks for getting back to me so quickly.

Janet: My pleasure. So the message I see here says that you need trading prices for some stocks on the Shanghai stock-market?

Olivier: That's right. I'm doing a forecast for the next two quarters and I'm told you're the person who keeps these historical records.

Janet: I do! OK, well let's start first with the companies you need information about. What are their names?

Olivier: Shanghai Baolian Steel and Jiangsu-Zhejiang Shipping Lines.

Janet: Right. And what trading dates do you need?

Olivier: I need the stock price on both companies from January 2001 and September 2004.

Janet: All right. Well, I can give you those figures for Shanghai Baolian Steel right now because I have that file on my desk at the moment. January 2001 the price was 13.24 RMB per share and in September 2004 that price was 21.30 RMB per share.

Olivier: Great. Let me just write that down...

Janet: The prices for the shipping company I will have to look up. I'll check into that and call you back later.

Olivier: I'm afraid I need that information as soon as possible. I'll be going out in about 30 minutes and won't be back until Tuesday. How long will it take you to locate that information?

Janet: At least an hour or so. Can I call you on Tuesday morning with those figures?

Olivier: Well, I really could use that information before then. If I stay here until 4, do you think you could call me back before then? I'm sorry for the short notice!

Janet: That's OK. That should give me enough time. I will go and get that information now. I'll call you before 4.

Olivier: Oh, fantastic! I really do appreciate that, Janet!

Notes

When Janet calls Olivier, she reminds him about the message he left her by saying:

So the message I have here says you need...



Instead of asking what Olivier needs, Janet just repeats the information she received in the message. This kind of clarifying makes Janet seem efficient and well-organized. Janet could have said:

*I got your message and if I understand it correctly, you need...
It seems that you need...
I understand that you need...*

Janet starts by saying:

Let's start first with...

Notice how Janet is also very organized in how she asks for information. First she asks for both company names and only then does she ask about the dates. Again, this reassures Olivier that his request will be handled efficiently and accurately. Using these kinds of words (first, second, then, next) helps keep her focused on what she needs as well. Janet could also have said:

*First, I'd like to ask you...
The first thing I need is ...
I'd like to start with...*

Olivier tells Janet that he needs prices for certain dates. Sometimes the verb need can be too direct. But it can also make an important request seem even more urgent. Using 'need' (or not using it) will depend on how close the relationship is between the people involved. Olivier could have been a little less direct by saying:

*I'd like to see those figures before Tuesday.
I could use some information on stock prices.*

Or he could have been even more polite and phrased his request as a question:

*Would you mind locating the stock prices for me?
Could you possibly send me over the stock prices?
Would you send me the stock prices?*

Janet tells Olivier:

I'll check into that and call you back later.

The word "later" in English is not an exact amount of time and can often lead to confusion. Here Janet probably means that she will call Olivier back in the afternoon, but it's not exactly clear. Keep in mind that the more specific your language, the better, especially in business.

I will call you later.

Better -->

I will call you in an hour.

Can I send you that information later?

Better -->

Can I send you that information tomorrow morning?



The phrase “in a while” is also quite unspecific:

I'll look that up in a while and get back to you.

Better -->

I will look that up and get back to you before three.

Then Olivier reminds Janet that the information is needed soon. He says:

I'm afraid I need that information as soon as possible.

I'm afraid is a polite way of saying “that won't work” or “I can't accept that.”

*I'm afraid 3.30 is too late.
I'm afraid I need it sooner.*

As *soon as possible* is a time phrase which is a polite way of saying “now” (which is considered very impolite in a business context). Notice, too, that if you use the phrase as soon as possible, you should use it with a direct verb like need (instead of the more polite and less direct I would like...). Again, this communicates the urgency of the information:

*I need those figures as soon as possible.
I'm afraid I need that report as soon as possible.*

Here are some other ways of communicating “now” politely:

*It's rather urgent.
It's important that I have that before 4.30 today.*

But avoid sentences like these which would be considered too direct (impolite, in other words):

*I need those figures now. IMPOLITE
You need to send me that report immediately. IMPOLITE*

Another thing to remember is that it is common to offer an apology if we are asking for something urgently.

*I'm terribly sorry but I really do need that information as soon as possible.
It's important that I get those figures before tomorrow afternoon. I apologize for the short notice!*

And, of course, it's always polite to say thank you at the end:

I really do appreciate that!

To acknowledge that a colleague or co-worker is doing you a favour, it's polite to thank them in a genuine way. Sometimes a simple “thank you” is not enough:

*I appreciate you helping me out like this!
It's so nice of you to do this for me!
Thank you so much, Janet, for doing this!*



Chasing up Payment on the Phone

Introduction

As anyone working in business knows, getting people to pay their bills on time is not always easy. Often, other companies, suppliers and retailers don't pay because of filing or communication errors—with thousands of bills, invoices, receipts and statements in a typical accountant's office, this is no surprise. Other times, though, we have to deal with those who either are unwilling or unable to pay their bills on time. It's very important, in all the situations above, that we maintain our professional language, even when dealing with impolite clients or customers.

Situation

Peter Mann is a new collections agent at a coffee supply company. His first task is to chase up two overdue accounts and get a commitment from each shop to catch up with or settle their account balances as soon as possible.

Peter calls two customers, both of whom haven't paid their bills. Peter's aim is clear: get his customers to pay the amount owed as soon as possible. How does he do this? Pay close attention to the language that Peter uses: he is firm, but also professional. What words and phrases does he use in order to remain professional, but to communicate that he expects payment soon?

Dialogue 1

Customer: Good morning, Perky Pastime. This is Marco. How may I help you?

Peter: Good morning. Could I speak to your manager, please?

Customer: Just a moment, sir. Who's calling?

Peter: It's Peter Mann from The Bogota Bean. (pause....)

Manager: Hello, this is Paula Brown. What can I do for you?

Peter: Hello, Ms Brown. My name is Peter Mann and I'm calling about an overdue account that your company has with us.

Manager: Oh, just a moment. Let me run back to my office so I can get my files out. (pause....) OK. Now what was the name of your company again?

Peter: The Bogota Bean.

Manager: Yes, I see your last letter. Well, let me start off by apologising for the delay in responding to this account. I've been out of town for three weeks and only just got back last night. I saw this letter first thing in the morning and since I usually pay my bills on time, I do take this situation very seriously.



- Peter: Well, I'm glad to hear that, Ms Brown. I can see from your payment history that you usually do pay on time.*
- Manager: And what's the total amount due again?*
- Peter: It's \$567.33.*
- Manager: Yes, OK. Well, I'll write out a cheque and mail it to you straight away.*
- Peter: So will you be paying the bill in full, sir?*
- Manager: Yes, I will. You should receive the cheque tomorrow.*
- Peter: Excellent. I look forward to receiving it.*

Dialogue 2

- Customer: Barstucks. This is Donna. How may I help you?*
- Peter: Could I speak to the manager, please?*
- Customer: This is Donna Reid, the manager.*
- Peter: Hello, Ms Reid. My name is Peter Mann and I'm calling from The Bogota Bean. I'm calling about an outstanding account that your company has with us. I believe I sent a letter three weeks ago to your attention regarding the unpaid balance.*
- Customer: Yes, I can remember seeing that.*
- Peter: Perhaps you have a moment so that we can discuss your account?*
- Customer: Well, I guess so. The problem is that we aren't really in a position to send a payment in at the moment. Is there any way you could give us another 90 days?*
- Peter: I'm afraid that's not really possible at this point. We really do need payment this week.*
- Customer: Well, as I explained, we can't really pay anything currently. Perhaps we might be able to next month. But as I said, paying now is out of the question.*
- Peter: That is an alternative. If we extend the terms by another 30 days, would you be able to pay off the bill in full then?*
- Customer: We should be able to pay it off, but I can at least promise to make a partial payment in 30 days if not.*
- Peter: OK. I'll extend your account terms then and I'll send you a reminder this afternoon to reiterate that in 30 days you'll try your best to pay off the account. Remember that once the account is paid in full, we can extend credit once again.*



Customer: Yes, I'm aware of that and we do want to pay this account off as soon as we can. Thank you for your understanding.

Notes

Notice how in both phone calls, Peter is very clear about why he is calling. While it's important to be friendly and polite in dealing with matters of money, it's also important to get to the point as soon as possible. Peter says:

*I'm calling about an overdue account.
I'm calling about an outstanding account.*

Notice that Peter says nothing about money. When dealing in most day-to-day business situations, especially in situations where money is owed, we avoid using the word money. Instead, we use words like:

account, balance, amount, bill, invoice.

Notice, too, that Peter doesn't say the word late. Late is a negative word and is sure to create tension with your customer. Using more neutral words is considered more professional:

overdue, past due, unpaid, outstanding.

Here are some other ways Peter could have phrased himself:

*I'm calling in reference to an outstanding invoice.
I'm calling to enquire about an unpaid account.
I'm calling to talk to the manager about a past due balance.*

Peter says that he can see Paula's company's payment history—this record is what is kept to see if a customer pays his or her bills on time. Companies that consistently pay on time are often given better deals and they are often also more willing to be negotiated with in the unfortunate event that the company has financial difficulties in the future. Conversely, companies that have a poor payment history are often charged more and rarely given any understanding

Because Paula values her company's relationship with Peter's company, she apologizes.

Well, let me start off by apologising for the delay in responding to this account.

She could also have said:

*I'm terribly sorry for letting this fall behind.
I'd like to apologize for being so late in paying this.
I apologise for the delay in settling this invoice.*

Now, luckily for Peter, Perky Pasttime indicates that they will send payment immediately. Often, though, it's not that easy, as the second dialogue demonstrates. Just like people, companies often suffer through difficult economic times and few companies always pay every single bill on time. Donna, at Barstucks, is in a situation such as this, and she is hoping to "buy time" from Peter. She does this by asking:

Is there any way you could give us another 90 days?



Note that for accounting reasons, companies often bill and pay in 90 day cycles (each year is divided into four quarters). Donna could also have asked the question this way:

*Could we possibly have another 90 days?
Would it be possible to give us more time?
Could you possibly extend our deadline by 30 days?*

She then might explain why. Companies such as Peter's are unlikely to give an extension on credit without some explanation about why there is a delay.

*I'm afraid we've been having some financial difficulties.
We are in a transition period currently and have fallen a bit behind.
We've been having a difficult period but we will be on our feet again soon.*

If Peter feels that the company is not likely to do much business in the future, he might get more demanding:

*I'm afraid that's simply not acceptable to us.
No, that's really not possible for us at this point.
I really doubt whether we would be interested in doing that.*

Or Peter might consider making different arrangements:

*Would it be possible to pay half now and the other half in 60 days?
Would you be in a position to make partial payments for the next 90 days?
Would you be willing to work out a payment schedule?*

Keep in mind, too, that Barstucks could also make the above suggestions as well. What both companies will try to do is reach a compromise and this might go on for some time, it might even take several phone calls to work out the deal.

Sometimes, unfortunately, despite all the work that Peter is willing to do to get the bill paid off, this is not enough and a company still refuses to pay or is unwilling to negotiate payment. In such cases, a polite threat might be necessary:

*Our company policy is to refer this to a collection agency if we can't get it resolved within 180 days.
We would certainly like to continue our business relationship with you but.....
I certainly hope we can resolve this so further action is unnecessary.*

Notice that money and late are still not mentioned, even when a threat is being issued. There are several things that Peter could do: he could refer the bill to a collection agency, he could end the business relationship with the customer, or he could even sue Barstucks for the outstanding amount. Let's take a look at these options and what they mean:

A Collection Agency is a company that specializes in getting companies to pay their bills. Peter's company would accept a partial payment from the collection agency (perhaps they would pay \$300 of the \$550 owed), and the collection agency then gets more aggressive with Barstucks. This is sometimes done on a business to business level, though usually for smaller amounts. It is often done, though, to individuals who don't pay their bills.

Ceasing the business relationship is a step that is seldom made. It may be that Peter simply flags Barstucks' account that no further business is to be done until the bill is paid. This is usually done for companies with small to medium-sized accounts due. It is rarely permanent, though, and as



soon as Barstucks does pay its bill, the chances are Peter's company will do business again: businesses hate losing customers, after all.

Finally, Peter's company could sue Barstucks. For the amount due here, it is very unlikely as it would involve hiring a lawyer and hours of a company's time. For very high outstanding bills, though, it is quite common for one company to sue another.

Since Paula does agree to pay the bill, she informs Peter of what she can or will do:

Well, I'll write out a cheque and mail it to you straight away.

She could also have said:

I do plan on getting this account up to date as soon as possible.

We would like to get this resolved.

We will certainly send a payment in as soon as we can.

But Donna cannot. One thing that is important is that both sides negotiate until they reach a compromise. Donna cannot pay; Peter wants her to pay something. So he offers a compromise or a number of alternatives:

Do you think you could pay next month?

Would it be possible to pay part of the bill by May 15th?

Could you possibly send half of the amount due by the end of this quarter?

After a customer does agree to send the payment, we often clarify to make sure that the facts are established. This is often done before the end of the call.

So will you be able to pay this invoice in full?

So we can expect payment within the next three days.

I certainly hope we receive your cheque soon, sir.

I will expect your payment within two days.

Additional Dialogue Transcript

David: Hi. I'd like to speak to someone in the accounting department, please.

Receptionist: Just a moment, sir. May I ask your name?

David: Sure. It's David Henschell.

Receptionist: OK. I'm connecting you, sir.

Sharon: Accounting, this is Sharon.

David: Hi, Sharon. My name is David Henschell and I am calling from Delta Phi Construction. I am calling in reference to an outstanding bill you have with our company.

Sharon: Oh, OK. I wasn't aware that we had an outstanding bill. When is the bill dated?

David: It's from October 2006.



- Sharon: *I see. OK and what is the amount due?*
- David: *\$787.25.*
- Sharon: *OK. Let me go and pull my records from that month. October 2006, you said?*
- David: *That's right.*
- Sharon: *Right. I see the bill here and according to my records that invoice was paid in full on 3 November 2006.*
- David: *Oh, was it? Do you have a cheque or invoice number for that payment?*
- Sharon: *Yes, it's cheque #4332 and I've written invoice #12-332 on the cheque.*
- David: *Right. I'll look into this and get back to you. We've had an accounting department move since that date so perhaps it's a mistake our end.*
- Sharon: *Yes, please do because we do a lot of business with your company and want to have a clean payment history.*
- David: *OK, I'll call you back this afternoon.*



Placing, Changing and Cancelling Orders

Introduction

A lot of people and businesses place their orders for products and services over the Internet these days, but many still prefer to do business over the phone. Speaking to someone personally gives a sense of security and peace of mind. And if you need to change or cancel an order, speaking directly to a representative of the company you're ordering from gives confidence that they will carry out your instructions correctly.

In this lesson, we're going to have a look at three telephone conversations: placing an order, changing an order, and cancelling an order. As you can imagine, when business is done over the phone, it's important that details are recorded accurately. This process involves a lot of checking, repeating and confirming. We use specific phrases in English for these functions which you'll hear throughout these dialogues.

Situation 1: Placing an Order

Read through the following telephone conversation between Sara, a customer service assistant at a retail firm, and Bob, a regular customer who has called to place a new order for clothing items.

Dialogue 1

Sara: Good morning, Wearhouse Retails. This is Sara; how may I help you?

Bob: Morning Sara, this is Bob Henderson from Thatcher's showroom. I'd like to place an order, please.

Sara: Of course; I can help you with that. I see that we have your details on record, so you can just go ahead and give me the details of the new order.

Bob: Thank you, Sara. Item one is one thousand polo shirts: two hundred each in sizes extra small, small, medium, large and extra large. In each size, we'd like one hundred white shirts and one hundred navy blue ones.

Sara: Thank you; please go ahead. I'll confirm the items before finalizing the order.

Bob: Great. Item two, we'd like one thousand pairs of bootcut blue denim jeans—one hundred each in sizes 24 to 42.

Sara: Will those be men's or women's jeans?

Bob: Do you have any unisex models? I seem to recollect ordering them from you before.

Sara: Yes, we do. So you'd like to order one thousand pairs of unisex bootcut jeans in the sizes you listed?



Bob: Yes, thanks. Item three, we'd like one thousand blue denim jackets—two hundred and fifty each in sizes small, medium, large and extra large.

Sara: Will there be anything else?

Bob: That's all, thanks.

Sara: Okay, let me confirm your order. That's one thousand polo shirts, two hundred each in sizes extra small, small, medium, large and extra large, with one hundred shirts per size in white and navy blue; one thousand pairs of unisex blue denim bootcut jeans, one hundred each in sizes 24, 26, 28, 30, 32, 34, 36, 38, 40 and 42; and one thousand blue denim jackets, two hundred and fifty each in sizes small, medium, large and extra large. Is that correct?

Bob: That's right. I suppose you'll bill us through the regular procedure?

Sara: Yes, we will email you an invoice within the next two hours. Is there any change in your email addresses, telephone numbers or delivery addresses?

Bob: No, nothing's changed.

Sara: Thank you. Please note that according to our cancellation policy, we can give you complete refunds only if the order is cancelled within seven days.

Bob: Yes, we understand the terms.

Sara: Thank you. Please note your reference number for your records. ET143087. That's Echo Tango one four three oh eight seven.

Bob: Echo Tango one four three oh eight seven. Got it, thanks!

Sara: Will there be anything else?

Bob: No, that's all, thanks.

Sara: Thank you for your order, and have a pleasant day!

Notes

When Sara answers the phone, she ensures that certain items of information are included:

Good morning, Wearhouse Retails. This is Sara; how may I help you?

Note that she greets the caller and identifies the name of her company. By doing so, you confirm that the caller has the right number. Sara then gives her name and says, "How may I help you?" This immediately lets the caller know that he has reached the right person to help him place his order. Of course, keep in mind that these opening should be fairly brief to avoid keeping the caller waiting too long.

Whether you give your full name or only your first name while answering the phone is your choice. Usually, if you are answering an extension, you can use just your first name since the call is for anyone in your department. If you are in a position where only you handles certain duties, then you



should give your full name. For example, if Sara were an accounts manager whom Bob wanted to speak to, she would have answered the phone by saying, “Sara White, accounts manager.”

In turn, Bob identifies himself and his company. He makes his request straight away since it’s not necessary to exchange pleasantries or small talk in these situations. He says: “I’d like to place an order, please.”

We use the phrase “I’d like to” to make polite requests. Bob could also have said:

*Could I place an order?
Can I place a new order?*

Sara responds by saying, “I can help you with that.” She goes on to say:

I see that we have your details on record, so you can just go ahead and give me the details of the new order.

This tells Bob that she has verified the record for Thatcher’s on her computer. While placing or receiving orders, it’s best to keep your records handy in case you need to verify something quickly. It’s perfectly okay to say, “May I place you on hold for a minute while I check our records?” However, it’s unprofessional to keep someone waiting for too long.

Bob then lists the items his showroom requires. Note that Sara listens actively rather than passively entering the details of the order. She asks Bob to confirm if he wants jeans for men or women. She says:

Will those be men’s or women’s jeans?

After Bob has given her the details, Sara asks:

Will there be anything else?

We use phrases such as “Will there be anything else?” “Is there anything else?” and “Is that all?” to check if that is the complete order. Don’t ask “Is that it?” which sounds like you’re not happy with the size of the order!

Bob responds by saying, “That’s all, thanks.” This is rather informal, but quite acceptable in business communication. Bob could also have said: “No thank you, that will be all” or “That’ll be all, thanks.”

Sara then goes on to confirm Bob’s order by repeating all the details that he has just given her. It is important to end with the question “Is that correct?” or “Have I got it right?” so that the customer knows that you care about getting their order right.

Since Bob is a regular customer, he does not ask to verify the payment procedure, but simply says: “I suppose you’ll bill us through the regular procedure?” Sara confirms this but also mentions how the invoice will be sent, so that Bob has no doubts about the process. She also checks if the buyer’s contact details are correct and unchanged. She says:

Yes, we will email you an invoice within the next two hours. Is there any change in your email addresses, telephone numbers or delivery addresses?

Note that Sara and Bob thank each other for each piece of information. This seems like a mere formality, but helps to create a tone of courtesy and respect.



Sara then reminds Bob of her firm's cancellation policy by saying, "Please note that according to our cancellation policy, we can give you complete refunds only if the order is cancelled within seven days." She also gives him his reference number, and repeats it clearly so that he can note it down correctly. The seller usually provides such information without having to be asked. She says:

Thank you. Please note your reference number for your records. ET143087. That's Echo Tango one four three oh eight seven.

The words 'Echo' and 'Tango' belong to the phonetic alphabet, which allows you to spell out words clearly for a listener.

Before ending the call, Sara confirms that Bob does not need any other help. She uses the same phrase she used earlier in the conversation:

Will there be anything else?

Sara knows the order is complete but this is just a polite way of ending a conversation of this type.

Situation 2: Changing an Order

Two days later, Bob calls again to make some changes to the order he had placed earlier.

Dialogue 2

Sara: Good morning, Warehouse Retails, this is Sara. How may I assist you?

Bob: Hi Sara, this is Bob Henderson from Thatcher's showroom. I'd like to make some changes to an order we placed on the 14th.

Sara: Sure, I can help you with that. May I have your reference number, please?

Bob: Yes, it's ET143087. That's Echo Tango one four three oh eight seven.

Sara: Thank you. I see that the order is for one thousand polo shirts, one thousand pairs of bootcut jeans and one thousand denim jackets. Is that correct?

Bob: That's right. We'd like to change item one, please.

Sara: No problem. What changes would you like to make?

Bob: We'd like one hundred polo shirts in size extra small, instead of the two hundred ordered earlier. The rest of the order remains the same.

Sara: Would you like to specify the colors for the revised items as well?

Bob: Oh yes, I forgot. Fifty white and fifty navy blue, please.

Sara: Let me confirm that: that would be one hundred polo shirts in extra small size, fifty white and fifty navy blue, instead of the original two hundred. Is that correct?



Bob: That's right, thanks!

Sara: Thank you. Will there be anything else?

Bob: No, thank you, that's about it.

Sara: Thank you for your call, and have a great evening!

Notes

The second dialogue is briefer than the first since Bob only needs to make a small change to his original order. However, Sara follows the same process of receiving and verifying the information.

After the speakers have greeted and identified each other, Bob goes on to say: "I'd like to make some changes to an order we placed on the 14th." Note that he identifies the date of the order instead of saying "yesterday" or "a couple of days ago." This makes it easier for Sara to check her records.

Sara then asks Bob to verify the reference number for his order by asking, "May I have your reference number, please?" Here are some more useful phrases to ask for such information:

*Could you give me your reference number?
I'll need your reference number, please.*

Once Bob gives details of the changes to his order, Sara is again quick to note that he has left out one detail. When someone makes an omission or a similar error, it's polite to point it out indirectly. Sara does not say, "You forgot to specify the colors." Instead, she phrases it as a question by saying:

Would you like to specify the colors for the revised items as well?

She could also have asked:

*What changes would you like in the colors?
Can I also make a note of what colors you would like?*

As in the previous conversation, Sara again verifies the information and asks Bob if she can help him with anything else before ending the conversation.

Situation 3: Cancelling an Order

This is the third conversation between Sara and Bob, who this time has called to cancel his order.

Dialogue 3

Sara: Good afternoon, Wearhouse Retails, you're speaking to Sara. How may I help you?

Bob: Hi Sara, this is Bob Henderson again from Thatcher's. We placed an order on the 14th, but I'm afraid we need to cancel it.



Sara: Let me just check our records. May I have the reference number, please?

Bob: Sure, that's ET143087. That's Echo Tango one four three oh eight seven.

Sara: Thank you. Would you like to cancel the entire order?

Bob: I'm afraid so. We're very sorry, but we've learnt that due to the surplus from our last order of the same items, we won't be needing more items at this time. But we'll definitely need more supplies next season.

Sara: No apologies necessary! I have recorded your cancellation request and we'll send you a confirmation email by the end of the day. Your deposit will be refunded in full since your cancellation was made within the required period. We look forward to your future orders.

Bob: You'll certainly get them—you're our main suppliers for our range of casual wear!

Sara: Thank you! Will there be anything else?

Bob: Not at this time, thanks!

Notes

When Bob calls again to cancel the order, there are two important points to note. Firstly, Sara confirms if Bob wants to cancel the entire order. While no information needs to be verified this time, it's still important to cover all the bases and make sure you aren't overlooking anything.

Additionally, Bob apologises for cancelling the order.

We placed an order on the 14th, but I'm afraid we need to cancel it.

We use the phrase "I'm afraid" before bad or negative news to soften it. It basically means "I'm sorry but..." Here are some other examples:

I'm afraid we've already assigned that position to someone.

I'm afraid we've decided to use another supplier.

I'm afraid we no longer intend to use your services.

It may seem that apologies are not strictly necessary in this case because Bob's firm has canceled the order within the specified period. However, Bob is trying to make the cancellation as graciously as possible, since the business is valued on both sides and he would like to keep it that way.

Sara checks if Bob wants to cancel all or part of his order. She asks:

Sara: Would you like to cancel the entire order?

Bob: I'm afraid so. We're very sorry, but we've learnt that due to the surplus from our last order of the same items, we won't be needing more items at this time.



Bob replies “I’m afraid so.” This just means “Sorry but yes”. It’s a polite way of acknowledging bad news. Then he apologises again saying “We’re very sorry..” and provides a valid reason for canceling the order. It polite to say why you are canceling.

Bobs ends the conversation by assuring Sara that his company will make future orders by saying “But we’ll definitely need more supplies next season.”

It’s always a good idea to end a conversation which involves negative news on a positive note to maintain the business relationship. Here’s how the conversation finishes:

Sara: We look forward to your future orders.

Bob: You’ll certainly get them—you’re our main suppliers for our range of casual wear!

Sara: Thank you! Will there be anything else?

Bob: Not at this time, thanks!

Conclusion

In this lesson, we have seen that placing, changing and cancelling orders over the telephone requires the use of certain functional words and phrases which make the procedure smoother.

Remember to always keep details such as your order number or the description of the items you are selling or purchasing close at hand, so that you don’t have to look them up while talking to the buyer or seller.

Also keep in mind that you should ask for confirmation of your transaction via mail or fax. Keep your statements short and direct so that the person you are speaking to can follow you easily, and ask for confirmation of details to be repeated if necessary.

Additional Dialogue Transcripts

Dialogue Transcript 1 - Placing an Order

Sam: Hi, I’d like to place an order, please.

Marta: I can certainly help you with that. Are you a returning customer?

Sam: Yes, this is Sam Rochester from Woolworth Associates.

Marta: Welcome back, Mr Rochester. How may I help you today?

Sam: We’d like to place an order for one hundred copies of The Physician’s Manual by Edward Gray, please.

Marta: Certainly. Would that be the sixth edition?

Sam: Yes, that’s the latest edition, isn’t it?



Marta: Yes, it is. Would you like the paperback edition?

Sam: We'd prefer the hardback, if you have it.

Marta: Yes, we do. Let me confirm that. One hundred copies of The Physician's Manual by Edward Gray, sixth edition, hardback. Is that correct?

Sam: That's right. When could we have the invoice?

Marta: We'll fax it across in the next thirty minutes. Is your fax number 885-333-906?

Sam: That's correct.

Marta: Thank you. Your order number is 423098. That's four two three oh nine eight.

Sam: 423098. Got it.

Marta: Will there be anything else?

Dialogue Transcript 2 - Changing an Order

Sam: Hi, is that Marta? It's Sam Rochester here. I placed an order with you yesterday.

Marta: Hello Sam. Yes, I remember. How can I help you?

Sam: I'd like to revise that order if I may.

Marta: I can certainly help you with that! May I have your order number, please?

Sam: Sure. It's 423098. That's four two three oh nine eight.

Marta: Thank you. What are the changes you'd like to make?

Sam: We'd like to order fifty more copies of the book.

Marta: So that would now be one hundred and fifty copies of The Physician's Manual by Edward Gray, sixth edition, hardback. Am I right?

Sam: Could you make the extra fifty paperbacks, please.

Marta: Certainly. Let me confirm: that's one hundred hardback copies, and fifty paperbacks.

Sam: That's right. Will you be sending some verification of the change?

Marta: You'll receive a confirmation email within the hour.

Sam: That's fine. But could you email it to my secretary lila@prenticebooks.com?

Marta: Is Lila spelt L-I-L-A?

Sam: Actually it's spelt with a Y: L-Y-L-A.

Marta: OK, I've got it. Will there be anything else?





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Finalizing Agreements

Introduction

Quite often in business, a deal can be concluded without having a face-to-face business meeting. Where the terms of a deal are not so complex, or a deal has already been partially reached, much of the final negotiation can be done over the phone. In more complex situations, however, face-to-face negotiations are usually necessary.

If you would like to change the terms of an existing agreement, before you make your call to finalize the agreement, you should be clear about your starting and finishing positions. Do the calculations in advance and work out what a satisfactory outcome to the negotiations would be for you. Be aware of all the factors that have an impact on the deal; in most cases there will be some flexibility with these factors.

Situation

Jenny Bond of United Wholesalers in London has just received the following fax from Bernard Chan of NEG in Hong Kong. NEG supplies fork lift trucks.

FAX

Re: Special Order of 20 Fork Lift Trucks

Dear Jenny

We regret that our standard vehicles are not suitable for your purpose, but confirm that we can manufacture to the specifications you have forwarded.

Unless you can increase your order from 20 vehicles, however, there will be a substantial charge for this service.

Please let us know if you would like to pursue the matter further.

Yours sincerely

*Bernard Chan
International Sales Director*

Jenny then telephones Bernard to see if he will accept an order of 25 trucks so they can finalise an agreement.

Dialogue

Bernard : Good Morning. NEG. This is Bernard Chan speaking. How may I help you?

Jenny : Hello Bernard. This is Jenny Bond of United Wholesalers in London.



- Bernard :* Ah, hello Jenny. What can I do for you?
- Jenny :* I'm calling about the fork lift trucks we've been discussing.
- Bernard :* Oh, yes.
- Jenny :* Well, I received your fax this morning and I'd like to make a new proposal.
- Bernard :* Aha.
- Jenny :* If you could make the changes to the trucks at no extra charge, we'd be prepared to increase our order from 20 to 25 trucks. Do you think that would be acceptable?
- Bernard :* I'm afraid we still wouldn't be able to accept that. Our profit margin on each truck is very small you see.
- Jenny :* Well what would be the extra cost per truck to make the necessary changes?
- Bernard :* Let me see....We've worked out that for each truck the cost of material and labour would be an extra HK\$15,000.
- Jenny :* OK. I'd like to make you a new offer, then.
- Bernard :* Right.
- Jenny :* We could still go for 25 trucks. But we would expect you to half the charge for the extra work.
- Bernard :* Yes, I think we could probably work something out on that basis. Would you put that in writing for me?
- Jenny :* Yes, of course. I'll do that today. In the meantime, could you send us an official quotation for the work?
- Bernard :* Certainly, Jenny. I'll fax that to you in the next hour.

Notes

When you answer the phone on behalf of your company, it is important to greet the caller with "Good morning," or "Good afternoon." You should also give the name of your company, your own name and offer to help the caller. Let's see how Bernard answers the phone. As you listen, note whether he includes all the points I've just mentioned:

Good Morning. NEG. This is Bernard Chan speaking. How may I help you?

Note that when we answer the phone we say "This is" followed by our name. For example "This is Bernard Chan speaking." This can also be shortened to just "Bernard Chan speaking." We never say "I am Bernard Chan."

Jenny gets immediately to the point of her call. She says:

Published by: The Language Key Ltd
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<http://www.languagekey.com>
enquiry@languagekey.com



I'm calling about the fork lift trucks we've been discussing.

To indicate the purpose of your call, you can use phrases such as "I'm calling or phoning about..." Or you could say "I'd like to talk to you about..."

First just mention the general purpose of your call. And once the receiver is clear about this, give more specific details. Let's have a look at how Jenny does this. She says:

Jenny : I'm calling about the fork lift trucks we've been discussing.

Bernard : Oh, yes.

Jenny : Well, I received your fax this morning and I'd like to make a new proposal.

Bernard : Aha.

Jenny makes a clear reference to the fax she received from Bernard and then says "I'd like to make a new proposal." She uses this phrase to show that she wants to change the terms of the original deal and would like Bernard to consider these. She wants to introduce a new proposal to him. She could also have said something like "We'd like to make a new offer." Or: "We have something new for you to consider."

It's common when making a proposal in a negotiation to use conditional forms, especially the Type 2 conditional. Let's see what Jenny says:

If you could make the changes to the trucks at no extra charge, we'd be prepared to increase our order from 20 to 25 trucks.

The basic structure of a Type 2 conditional sentence is: If you could/would do something, we would do something also. Notice the use of the tentative modal verbs "could" and "would." Both these indicate possibility rather than certainty.

Let's have a look at a few more Type 2 conditional sentences. These would be typically used in a negotiation:

If you could lower your prices by 10%, we would place an order today.

If you would agree to payment terms of 90 days, we would increase our order to 100 units.

If you could include the annual servicing free of charge, we would accept your unit cost.

In Type 2 conditional sentences, it's also common to use the past simple tense in the "If" clause instead of using modal verbs. For example, Jenny instead of saying "If you could make the changes to the trucks at no extra charge," she could have said: "If you made the changes to the trucks at no extra charge, we'd be prepared to increase our order from 20 to 25 trucks." Such sentences using the past tense are more direct than using modal verbs. Let's see those example sentences again using "If" plus the past tense:

If you lowered your prices by 10%, we would place an order today.

If you agreed to payment terms of 90 days, we would increase our order to 100 units.

If you included the annual servicing free of charge, we would accept your unit cost.

There is no difference in the meaning of these Type 2 conditional sentences compared to the ones using modal verbs. The only difference is in the tone. Using modal verbs helps you to sound less direct and more tentative.



Once Jenny makes her new proposal, she immediately checks if it is acceptable to Bernard. She asks:

Do you think that would be acceptable?

Note that she continues using tentative, indirect language so as not to sound pushy or demanding. She doesn't say "Is this acceptable," or "Can you accept this?" These phrases are a little too direct for most negotiations. Also note that she uses "would" instead of "will." "Would" is used to indicate that something is conditional, not certain. "Will" is used to indicate that something is certain or cannot be changed. Jenny would not therefore say "Do you think that will be acceptable?"

Let's look at a few more polite ways of checking for acceptance:

Do you think you could accept that?

Does that sound acceptable to you?

How does that sound to you?

Bernard is unwilling to accept Jenny's proposal, but when rejecting it, he also uses polite, tentative language. He says:

I'm afraid we still wouldn't be able to accept that. Our profit margin on each truck is very small you see.

Bernard uses the phrase "I'm afraid" before he gives Jenny the bad news. "I'm afraid" is used to soften bad news. It's like you're saying "Sorry but." Notice also that Bernard continues using conditional forms. He says "we still wouldn't be able to accept." He doesn't say "we won't be able to accept" since nothing has been decided yet and everything is still up for negotiation.

Here are some other ways of politely rejecting a proposal:

I'm afraid that wouldn't be possible.

I don't think we could do that.

I'm sorry but we wouldn't be able to do that.

I'm afraid it's not possible for us to accept those terms.

Notice that in all these sentences the speaker softens the bad news using phrases such as "I'm afraid," and "I'm sorry but." Too firm or direct a rejection might cause offence and lead to an early end to the negotiation. By being tentative and polite you are almost telling the other side that although the offer is not acceptable, you are happy for the other side to put forward another proposal for your consideration. You are still willing to negotiate.

Jenny then checks what would be an acceptable cost to Bernard to make the deal go through. She changes from using tentative to direct language. This is a good technique as it forces the other side to show their position. Whether or not further concessions can be made after this point is another matter though. Let's see that exchange again:

Jenny : *Well what would be the extra cost per truck to make the necessary changes?*

Bernard : *Let me see....We've worked out that for each truck the cost of material and labour would be an extra HK\$15,000.*

Notice the continued use of the "would" conditional from both sides: "what would be the extra cost" and "labour would be an extra HK\$15,000."



Jenny is not convinced that this is Bernard's final position and therefore makes a new proposal. She says:

OK. I'd like to make you a new offer, then.

Bernard is clearly still willing to negotiate and hear what Jenny has to say. He's still willing to compromise.

Jenny then makes a second proposal. She says:

We could still go for 25 trucks. But we would expect you to half the charge for the extra work.

Notice again how Jenny uses tentative language when making her proposal. She says "We could still go for 25 trucks." She doesn't say "We will go for 25 trucks." The modal verb "could" indicates possibility, not certainty.

Although Bernard is willing to accept this offer, he doesn't state his acceptance with 100% certainty. He says:

Yes, I think we could probably work something out on that basis.

Using tentative language to indicate acceptance is quite common. Here, it shows that Bernard is accepting unwillingly and this tells Jenny that this is as far as he's willing to compromise. This is his limit.

Once agreement has been reached, it's normal to ask the side who made the proposal to provide written confirmation of the offer. Bernard asks:

Would you put that in writing for me?

He could also have asked:

*Do you think you could put that in writing?
We'd need that in writing.
Could you put that in a letter for me?*

Before ending the call, Jenny asks Bernard for a quotation based on the agreement they've reached. She asks:

In the meantime, could you send us an official quotation for the work?

She uses the polite request structure "could you" when making her request. She wouldn't say "Please send us an official quotation for the work" since this is far too direct. She might also have asked:

*Would you mind sending us a quotation for the work?
Would it be possible for you to send us a quotation for the work?
I would be grateful if you could us a quotation for the work.
I would appreciate it if you could send us a quotation for the work.*

When trying to finalise an agreement, it's important to keep the other party in the negotiation. In this regard, you should not state your final position too strongly since this may indicate that you are unwilling to compromise.



Use language which is polite and tentative. This will indicate that there might still be room for further negotiation.

When making a proposal, use conditional language. Do not state your proposal using certainties.

Try to become familiar with the Type 2 conditional structure since this is most useful when making new proposals during a negotiation.

Additional Dialogue Transcript

PART 1

A: *I'd like to make a new proposal.*

B: *OK, I'm listening.*

A: *We'd be prepared to accept your price if you would give us a two-year warranty on the machines.*

B: *I'm afraid we couldn't do that, but we would be willing to give you a further 5% discount.*

A: *What if we increased our order to 20 units? Would you be able to give us the two-year warranty?*

B: *Let me think..... Yes, we could probably accept that, but we wouldn't be able to give you the 5% discount as well.*

A: *That's fine with me.*

B: *Right, do you think you could put that in writing for me?*

A: *Certainly, I'll fax you over an official quotation later today.*

PART 2

A: *I've spoken to my boss and he'd like me to make you a new offer.*

B: *Right.*

A: *We're willing to increase our order to 100 units, if you could give us a further 15% discount.*

B: *Well, that's going to be difficult. We've already given you a 10% discount.*

A: *Yes, but we feel the price is still too high.*

B: *OK, we'd be prepared to give you a further 10% discount if you can sign the agreement today.*

A: *Yes, we can do that.*



B: *Right, if you could come by the office at around 3 pm, I'll prepare the necessary paperwork.*



Reporting Back

Introduction

In this lesson we're going to look at typical telephone conversations between staff and their boss. The staff are expected to call their head office to report to their boss about an event they're attending on behalf of their company.

Situation

Tony Chan and May Wong work for a travel company based in Hong Kong. They're attending an exhibition in Beijing to sell holidays, promote their company and find an agent. But can they do it?

After taking a day off to relax and sightsee, they now have to answer a few questions from their boss. First, May explains how they're getting on with finding an agent.

Dialogue 1

PART 1

May: Hello, it's May, in Beijing.

Boss: Hello May. How's the exhibition going? Is the stand busy? Are you selling many holidays?

May: Yes, thanks, it's very busy. I think it's going very well, actually.

Boss: Good. Are you having a good time in Beijing?

May: Apart from the fact that it's been raining all the time, yes we are, thanks. We went to the Great Wall on Sunday and we sometimes go shopping or to the cinemas in the evenings. But it's quite expensive here.

Boss: Oh is it? Have you had more discussions with the Japanese agent?

May: Yes. We had a long meeting with them. I think they'll be good and they have agreed to the commission of 11 percent.

Boss: So you think they'd make a good partner.

May: Yes, I do.

Boss: Good, that's good.

PART 2



Boss: Hello May? Are you still there?

May: Yes, I'm here.

Boss: The agents, do they seem reliable to you?

May: Reliable? Yes, I think so. They've got a lot of experience.

Boss: Fine. I think we should prepare a contract for them. If I fax you a draft contract, can you look at it and show it to them?

May: Yes, of course. They've also asked us for a large quantity of brochures to help them in their marketing.

Boss: OK, I'll arrange that. When is your next meeting with them?

May: We're meeting with their Finance Director tomorrow and then with the other directors on Tuesday, just to sort out some final details.

Boss: Fine. Let me know what happens. Thanks for all your hard work, May. Say hello to Tony.

Dialogue 2

PART 1

Tony: Hello, it's Tony, in Beijing.

Boss: Oh, hello Tony. How's the exhibition? Is everything going well?

Tony: Er, no not really. It's very quiet actually! We aren't doing much!

Boss: What? That's awful? How can you say that, Tony? Did you speak to the conference manager again?

Tony: Er, no, no. Why?

Boss: To get a better stand of course! We are paying a lot of money for that exhibition and for your hotel! Can't you speak to him again?

Tony: Er, OK. I'll do my best.

Boss: Have you spoken to any good agents yet?

Tony: Well, yes. There is one company, they seem very nice.

Boss: Nice? Nice? Have they got any experience? Are they reliable?

Tony: Erm, er, I'm not sure. I'll ask May...

PART 2



Tony: *Hello? Are you still there?*

Boss: *Yes, I'm here.*

Tony: *Em, we aren't sure about the agents.*

Boss: *Tony, please could you speak to them again and get more details about their experience.*

Tony: *But, they want to sign a contract tomorrow.*

Boss: *No, Tony. Do NOT sign anything until we know a lot more about them. Please get full details about their track record. I want to know who they've worked with before. Can you please send me a full report tomorrow?*

Tony: *But I was going to go to the cinema tonight!*

Boss: *Tony, you are not there to go to the cinema!*

Tony: *Fine. We also need more brochures.*

Boss: *OK. I'll send some more immediately. I'll start preparing a contract but we need a lot more information.*

Notes

Clearly, the first thing the boss wants to know is how May is getting on at the exhibition. He asks:

How's the exhibition?

And when he speaks to Tony later he asks:

Is everything going well?

We use 'how is something' or the more common short form, 'how's something', to find out if it is good, bad or average. For example:

*How's the weather?
How's the new office?
How's the new job?*

We can also use 'going' in a similar way with events that are happening now:

How's the new job going? Is it going well?

How's it going with the new sales team?

We can use 'going' in another way to ask how someone feels:

How's it going?

In this case it's used more as an informal greeting to mean 'how are you?'



Note that you cannot say:

How are you going?

You need to say:

How are you doing?

'How are you doing' has the same meaning as 'How's it going'. Both are common informal greetings meaning 'how are you?'.

May says something a little later which nicely illustrates the use of three common verb tenses: the present perfect continuous, the past simple and the present simple:

Apart from the fact that it's been raining all the time, yes we are, thanks. We went to the Great Wall on Sunday and we sometimes go shopping or to the cinemas in the evenings.

The present perfect continuous tense – it's been raining – is used for actions that started in the past and which continue in the present. It was raining in the past and it's still raining now. Here are some other examples:

I've been working hard.

We've been meeting a lot of potential customers.

The past simple tense – we went to the Great Wall on Sunday – is used for completed actions in the past where the timing of the action is stated. The action 'go to the Great Wall' is completed. We also know when it happened – on Sunday.

The present simple tense – we sometimes go shopping – is used for actions that we do on a regular or routine basis. It's not used for one-off actions.

Both May and her boss use tentative or uncertain language to ask and talk about business. The phrases 'I think' or 'Do you think' is often used when you want to ask or talk about things that are not completely certain.

When talking about the Japanese agent May says:

I think they'll be good.

She's not certain that they'll be good but she's fairly confident that they'll be good.

The boss later asks:

So you think they'd make a good partner?

He wouldn't normally use the future simple:

So will they make a good partner?

Because he knows that this question cannot be answered with complete certainty at this stage.

In Part 2, he asks another question about the Japanese agent:

Do they seem reliable?



'Seem' also makes the question tentative or uncertain. He could have rephrased this:

Do you think they are reliable?

May replies:

Yes, I think so.

By saying 'I think so' she means that she's almost certain that the Japanese agent is reliable.

Now let's move onto the second telephone conversation between Tony and his boss.

When a boss questions a subordinate it is usual to use direct questions. Tony's boss is very direct with him particularly because Tony doesn't seem to be in control of the situation in Beijing:

Did you speak to the conference manager again?

Can't you speak to him again?

Have you spoken to any good agents yet?

Have they got any experience?

Are they reliable?

On only one occasion did Tony's boss use a polite question format:

Tony, please could you speak to them again and get more details about their experience?

But angered by Tony's response, he quickly reverts to the direct format:

Do NOT sign anything until we know a lot more about them.

Please get full details about their track record.

Can you please send me a full report tomorrow?

There is no need to be indirect and overly polite when speaking to a subordinate. Directness achieves much better results with downward communication from superior to subordinate.

Native speakers often use the negative 'can't' instead of 'can' if they want to stress the importance of something. Tony's boss says:

Can't you speak to him again?

Instead of the weaker form:

Can you speak to him again?

Using the negative 'can't' puts pressure on Tony to speak to the Conference Manager again. It's like telling Tony that he should do something.

Here are some other examples:

Can't you go back to them with another offer?

Can't we get another couple of quotations?

Can't you finish the work off this evening?

Towards the end of Part 2, you'll notice two different references to the future. Tony says:

But I was going to go to the cinema tonight!



And the boss talks about the action he'll take:

I'll send some more immediately. I'll start preparing a contract but we need a lot more information.

Both 'going to' and 'will' are used to talk about the future. What is the difference between these sentences?

*I am going to work on Saturday.
I will work on Saturday.*

Generally 'going to' is used to talk about future plans or intentions. Plans can obviously change with time. They are not 100% fixed. The future simple tense 'will', on the other hand, is used for definite plans – plans that are fixed and won't change.



Cold Calls – Arranging a Meeting

Introduction

In personal selling, cold calling is the process of approaching potential clients by telephone, who have not agreed to such an interaction. The word "cold" is used because the person receiving the call is not expecting the call or has not specifically asked to be contacted by the sales person. It is often very frustrating and difficult for those making cold calls because they are often rebuffed, hung-up on and rejected by those receiving the calls. It could be said that it is equally frustrating for the person receiving the cold call, since they expected something they care about, and instead get a marketing pitch.

Some sales people have come to the conclusion that cold calling is ineffective, inefficient and a waste of their time. Others have tried to develop techniques to lower the rate of rejection. These approaches are based on the idea that the purpose of the call is not to make a sale, but to build trust and discover the truth about whether there is a good match between the potential client and product or services offered.

There are a number of ways in which cold calls can be effective. One is for the selling organization to start with a high quality, up-to-date database consisting of qualified potential clients that have an interest in the product being sold. Another is to use cold calls as a "step in the door". Rather than using the call to try to close a sale, it is used as the initial contact in a long-term relationship. This has the effect of removing the sales pressure from calls and making the goal of the call to build trust.

Situation 1

Kyle Brant is a salesman who calls two companies to try to set up a meeting. Notice how he introduces himself. Notice also how he find his "way in," his connection to make what he's selling more appealing to the potential customer.

Kyle first calls a busy customer who has no time to meet with him. How does the customer respond to his request for a meeting? Was the call a complete waste of time or was this the first successful step in building a relationship with this potential customer?

Dialogue 1

Reception: Projex Limited. How can I help you?

Kyle: Could you direct me to the IT Department Manager?

Reception: That would be Ruby Feng. I'll connect you. (slight pause...)

Ms Feng: Ruby Feng speaking.

Kyle: Hello Ms Feng. I'm Kyle Brant and I work for a large software company called B&J Entreprises. The reason I'm calling today is that I have an



exciting opportunity to demonstrate some of our new networking software aimed specifically at Marketing Companies.

Ms Feng: What did you say your company's name was?

Kyle: B&J Enterprises. We carry a large line of software designed for the marketing field. I was hoping that you had some time next week to meet with me briefly about how some of our products might enhance your current system.

Ms Feng: Oh, yes, I see. Well, unfortunately, this is not a great time of the year for us. We are swamped for the next few weeks.

Kyle: I see. Well perhaps you could just briefly answer a quick question about your current system? Are you happy with the programme?

Ms Feng: Well, overall, I'd say we are generally happy. Of course, there are always things which could be improved but it usually organises things in a fairly easy way.

Kyle: Are you using the BrandAIM software?

Ms Feng: Yes, as a matter of fact.

Kyle: And what would you change about it if you could?

Ms Feng: Well, I suppose I'd say that if the searching parameters were more inclusive, it might allow us to do fewer searches overall.

Kyle: It's funny you should mention that, because our current upgrade of our 5.0 DreamBrand programme works very well with BrandAIM, adding over 300 new searching parameters. I would very much like to come in and show you how useful our programme could be in maximising your time and your current system.

Ms Feng: Yes, mmmm....well it sounds very interesting. But as I said, it's just not possible currently as we are in the midst of a very large project. Perhaps you could call me back in six weeks or so and we could discuss it then?

Kyle: OK, well, I appreciate your time. I will certainly call you back in six weeks' time and see if your schedule is more open. Have a very good day, Ms Feng.

Ms Feng: Thank you very much, and you do likewise. Good bye.

Notes

Kyle introduces himself almost immediately to Ruby. He says:

I'm Kyle Brant...

Generally we don't use this construction when we are on the telephone unless we are going to follow it with additional information about why we are calling. But Kyle goes on to say:



I'm Kyle Brant and I work for a large software company called.....

More usually, we would say something like this:

My name is

My name is Amy Smith. I'm calling from DBT Ltd.

This is....

This is Amy Dobson from Genius Enterprises.

It's

It's Susan Boyd from Hitech Express.

Note that when introducing yourself to someone face-to-face, we wouldn't use "This is..." or "It's..." but only "I'm..." or "My name is...". "This is..." can also be used to introduce someone else:

John, this is Mary from Darlington Consultant. Mary, this is John. He works in Accounting.

Now, Kyle not only tells Ruby his name and his company's name, he also tells her a little bit about what his company does. Notice how he never says "I'm a salesperson" or "I'm a salesman." Usually, sales people don't state things so directly, especially over the phone with a potential customer. Notice, too, that he never says anything about selling anything. He just requests a meeting:

I was hoping that you had some time next week to meet with me briefly about how some of our products might enhance your current system.

This is a very common technique used by salespeople to get "in." It's always easier, after all, to sell your products if you've already met someone at a company. Here are some other phrases you could use to get that all-important meeting:

If you have some time next week, I'd like to sit down with you and explain briefly how some of our products can help you.....

If you would be willing to, I'd love to have the opportunity to meet with you to explain...

If you have a few spare minutes, I'm wondering if I could pop into your office next week to explain...

Ruby, though, informs Kyle that he is calling during a bad week. She says:

Unfortunately, this is not a great time of the year for us. We are swamped for the next few weeks.

This is a polite way of "putting Kyle off," of telling him "no" without being impolite. Ruby does this by saying she's busy. There are many ways you can say this:

I'm afraid I'll be in attending a conference all week.

I'm sorry but I'm tied up all week.

Sorry, I've got a pretty full schedule for the next few weeks.

I'm afraid I'm having to focus on other areas of work at the moment.

What's important is that the word "No" is seldom spoken because it is considered too direct.



Kyle doesn't accept this as the end, though. No good salesperson would. First, he shifts away from his meeting request to a more general request, asking Ruby if she has any questions about the software.

Well perhaps you could just briefly answer a quick question about your current system? Are you happy with the programme?

This helps establish his relationship with Ruby more fully. As many of us know, often the better we know someone, the harder it is to say "No" to them.

Ruby then asks Kyle if he can contact her at a later date.

Perhaps you could call me back in six weeks or so and we could discuss it then?

This is an important moment for Kyle, indicating that Ruby is interested in his product but that she is just busy to meet him at the moment. Kyle agrees to call her back at a later date. He says:

I will certainly call you back in six weeks' time and see if your schedule is more open.

Here are some other ways of saying you'll contact a person again at a later date:

I'll schedule a telephone call back to you in about six weeks then.

I'll make sure and give you a ring in six weeks.

I'll call you in about six weeks if that's OK with you.

Situation 2

Here Kyle calls a more receptive customer. Notice how Kyle turns his potential customer's question into a request for a meeting. How do they "negotiate" a time which is convenient for both of them to meet?

Dialogue 2

Reception: Good morning. Glory Marketing Consultants. This is Linda speaking. How may I direct your call?

Kyle: Good morning. May I speak to Jenny Ma in the IT department?

Reception: Just a moment, Sir. (slight pause...)

Jenny: This is Jenny. What can I do for you?

Kyle: Hello, Jenny. My name is Kyle Brant and I work for B&J Entreprises, a software company that specialises in software for the marketing field. I'm wondering if you have any time next week for me to come in and demonstrate some of the features of our latest programmes.

Jenny: Yes, actually I'm quite familiar with your products. I was given a promotional copy of one of your products last year and have found it to be very useful.

Kyle: That's great. Did you have any questions about using it?



- Jenny: *Actually, I did. Just some minor questions really. I'm still not sure how to set up the user account name and password. Are you familiar with that procedure?*
- Kyle: *Well, if it's the promotional copy, you can only log on as 'guest'. But if you decide to purchase the full version of the software, each user is set up with his or her own account and specific settings.*
- Jenny: *Oh, I see. And are you familiar with the add command in the tabulate field? It never seems to do what I want it to do.*
- Kyle: *I'd be happy to show you all the features. But it's probably easier if I show you in person. Are you available next Tuesday?*
- Jenny: *Let me check my schedule. Mmm...it looks like I'm available later in the morning.*
- Kyle: *I'm afraid I can't make it then. I have meetings until 2.30 that afternoon. What about on Thursday?*
- Jenny: *Unfortunately, on Thursday I'm out of the office, but I should be here all morning on Friday.*
- Kyle: *Yes, Friday morning suits me fine. Shall we say 10.30?*
- Jenny: *That'd be fine. Let me just write that down in my appointment book. Are you familiar with our office in Shanghai?*
- Kyle: *Yes, I am, actually. But how about if I just take down your extension number in case I can't find you.*
- Jenny: *OK, fine. My extension number is 4334. But I will come in and meet you in the lobby. You need to have an escort to get past the front desk actually.*
- Kyle: *Great! I will see you on Friday morning at 10.30.*

Notes

As in the earlier dialogue, this one starts with an introduction.

Hello, Jenny. My name is Kyle Brant and I work for B&J Entreprises.....

Kyle follows a very similar format to the earlier sales call, even asking a similar question when Jenny announces that she is familiar with his product. He's just following his carefully prepared sales pitch.

He then answers one of her questions and indicates that showing her in person might be more effective. He says:

I'd be happy to show you all the features. But it's probably easier if I show you in person.

Then he suggests a time for them to meet:



Are you available next Tuesday?

Here are some other ways of suggesting a time to meet:

*What about next Thursday afternoon?
How about sometime towards the end of the week?
How does Wednesday afternoon, around 4 o'clock suit you?
Could you possibly make it Thursday at around 10?
How does next Thursday afternoon suit you?*

Notice the specific use of prepositions with time phrases:

*We say IN July.
But we say ON July 10th.
We say DURING the week.
But we say ON Tuesday.
We say AT 3 o'clock.*

Now, when Kyle asks Jenny about Tuesday she says this:

Let me check my schedule.

She might also have said:

*I need to just check my diary.
Let me just log on to my schedule.
I'll need to check with my assistant.*

She then says that she's only available in the evening. For Kyle, this won't work so he says:

I'm afraid I can't make it then.

Here are some other ways of saying that a time isn't suitable:

*Oh, I'm afraid that won't really work for me.
Sorry, I'm not available then.
I'm afraid I'm not free at that time.
Sorry but that time doesn't suit me.*

They negotiate back and forth until they agree on a suitable time. Then, they confirm the agreed time. This can be done in a number of ways, either immediately after the time is agreed upon:

*That was Thursday at 10 a.m.?
Did you say Monday afternoon?
I'm sorry. Was that 11.30?*

Or at the end of the call:

*So I will see you Friday at 10.30.
I am looking forward to our meeting Tuesday at 4.
I look forward to seeing you tomorrow morning at 9.30!*



Additional Dialogue Transcript

- Reception: Jacobs Marketing, How can I help you?*
- Kyle: Could I speak to Jane Seagrove in the IT department, please?*
- Reception: Just a moment, sir. Who shall I say is calling?*
- Kyle: It's Kyle Brant from B&J Enterprises.*
- Reception: Just a moment, please.*
- Jane: This is Jane Seagrove speaking.*
- Kyle: Hello, Ms Seagrove. My name is Kyle Brant and I'm calling from B&J Enterprises with an opportunity to demonstrate some of our new networking software, aimed specifically at Marketing Companies.*
- Jane: Right, I was just looking at one of your brochures yesterday and some of your software seemed quite useful.*
- Kyle: Well, it should be because we've tailored it for companies just like yours'. Perhaps I could meet you, see what your needs are, and advise you on which software would be most suitable for your company.*
- Jane: Well, I'm rather tied up at the moment - certainly for the rest of this week anyway.*
- Kyle: Well, how does your schedule look next week? I'll be in your area on Thursday and Friday.*
- Jane: Let me just check. Just a moment. (pause). I can't make Thursday but Friday's possible.*
- Kyle: Great. Well I'm meeting an old client in the building next to you at 10. That shouldn't take too long. How about at 11?*
- Jane: Let's see. Well, I have a planning meeting at 10.30. That should be over by about 11.15. What about 11.30?*
- Kyle: Yes, that's fine.*
- Jane: I can give you a maximum of 30 minutes as I have a business lunch appointment at 12.30.*
- Kyle: That's fine. OK, shall I come straight up to your office on the 10th floor?*
- Jane: No, could you ask the girl at reception to call me when you arrive and I'll come down. You need an escort to access the offices.*
- Kyle: OK. So just to confirm. Ms Seagrove, I'll meet you next Friday - that's September 3 - at 11.30.*
- Jane: Fine. I look forward to seeing you. Bye.*



Kyle: *Goodbye.*



Telephone Sales Techniques

Introduction

Telephone selling forms a major part of many companies' sales strategy. Some people find the technique comes naturally but for others it is very difficult and they need to make a conscious effort to develop the necessary skills.

In this lesson we're going to look at some sales techniques you might use when receiving a telephone enquiry from a potential customer.

Situation

Here's a telephone conversation between a potential customer and a sales representative. The customer telephones the company because he is interested in purchasing some equipment.

Dialogue

Reception: Advanced Design Ltd. Good morning.

Customer: Good morning. Could I speak to someone about purchasing some equipment from you, please?

Reception: Yes. I'll put you through to our Sales Department.

Sales: May Hui, Sales Department. Can I help you?

Customer: Oh yes. I hope so. My name's Mr Smith of GPF Limited ... er ... we need some supplies for our Design Office.

Sales: I see. What sort of things are you looking for, Mr Smith?

Customer: Well, first of all, we need one complete new drawing board.

Sales: Well, in the standard range we have the D044 and the D045 models.

Customer: Oh ... what's the difference between them?

Sales: Well, the D045 has its own lighting system and it does cost slightly more, as a result.

Customer: So what's the total price?

Sales: For the D045 it's HK\$5,790.

Customer: Mmm ... what exactly are the boards made of?



- Sales: *Well, they have a plywood base with a high quality, scratch-resistant finish.*
- Customer: *OK. Can you tell me how long it takes to deliver?*
- Sales: *I can't give a definite date now, I'm afraid, because it depends on the other orders we have to get out but it would certainly be within three weeks.*
- Customer: *OK. Now, we also want some drawing pens, ink and erasing fluid and ... er ... some drawing paper.*
- Sales: *Ah ... now the lady who deals with drawing office supplies isn't here this morning, I'm afraid, but I'll ask her to give you a ring this afternoon, if you like.*
- Customer: *Oh yes. Thank you.*
- Sales: *What is your telephone number, Mr Smith?*
- Customer: *It's 2894 3838 extension 501.*
- Sales: *OK. I'll get Miss Leung to ring you this afternoon. Now, would you like me to place an order for one D045 drawing board?*
- Customer: *Yes please, if you would.*
- Sales: *Delivery and invoice to your address in Nathan Road, Tsimshatsui - is that right?*
- Customer: *Yes, that's it. Thank you very much indeed. You've been most helpful. Goodbye.*
- Sales: *Goodbye Mr Smith.*

Notes

At a place of business, a receptionist will usually answer the phone, directing the caller to the appropriate individual. Often, the first words a receptionist says when she answers the phone will be the name of the company or business. This situation's opener is a perfect example:

Advanced Design Ltd. Good morning.

The customer then begins the conversation:

Good morning. Could I speak to someone about purchasing some equipment from you, please?

"Good morning" is a salutation or greeting. And, on the telephone, a salutation is a very good way to begin a conversation with somebody you do not know. Other salutations are:

*Good morning.
Good afternoon.
Good evening.*



Also notice that when the customer asks to speak to someone about purchasing, he does not say “I want to speak to someone...” or “Let me speak to someone...” Instead he uses an indirect question, a formal and polite way to ask for something. Other ways you can say this would be:

Do you think I could talk to someone in purchasing, please?
Would it be possible to talk to someone in purchasing, please?

The receptionist connects the customer to the sales department.

May Hui, Sales Department. Can I help you?

The first thing the sales department representative says is her name.

Remember “What do you want?” is a much too impolite way to ask a customer a question, so May instead uses an indirect question. Another way you could say this would be:

What can I do for you?
How may I help you?
Is there anything I can do for you?

The customer identifies himself and his company, saying:

Oh yes. I hope so. My name's Mr. Smith of GPF Limited ... er ... we need some supplies for our Design Office.

She then asks:

I see. What sort of things are you looking for, Mr. Smith?

When May says “I see,” she is telling Mr. Smith that she understands his reason for calling. She could also say:

Very good.
I understand.
Well, I hope I can help you.

Mr. Smith then answers:

Well, first of all, we need one complete new drawing board.

He tells her his business needs a “new drawing board.” However, he has also said “first of all,” which Let’s May know that he needs more than one thing. To save time, Mr. Smith should tell May how many things he needs. Or he could just give a very short list of what he needs like:

I need four items. I hope you have them.

OR

Well, I am looking for a drawing board, some marking pens, drawing paper and erasing fluid.

May tells him what kind of drawing boards she has:

Well, in the standard range we have the D044 and the D045 models.



And Mr. Smith asks:

Oh ... what's the difference between them?

May goes on and explains the differences by giving Mr. Smith the 'specs', which means the specifications or details, of the items.

Well, the D045 has its own lighting system and it does cost slightly more, as a result.

After giving the specs, Mr. Smith asks:

So what's the total price?

Mr. Smith's question is not clear because he is asking the total price without saying which drawing board he wants.

The word "total" means "everything together".

So if Mr. Smith didn't say he wanted ONE drawing board, May could have easily believed that he wanted BOTH drawing boards just because he used the word "total."

May tells him the price of the last drawing board she was talking about:

For the D045 it's HK\$5,790.

Mr. Smith considers what May has told him and then asks what kinds of materials the drawing boards are made of:

Mmm ... what exactly are the boards made of?

And May gives more specs:

Well, they have a plywood base with a high quality, scratch-resistant finish.

Mr. Smith agrees by saying "OK" and then asks:

OK. Can you tell me how long it takes to deliver?

Here we see that Mr. Smith agrees. But what is he agreeing to? Is he agreeing to buy ONE drawing board? Or is he agreeing to buy TWO drawing boards? More likely he is saying "OK" because he is clear with all of the specs.

After Mr. Smith asks about delivery, May then answers:

I can't give a definite date now, I'm afraid, because it depends on the other orders we have to get out but it would certainly be within three weeks.

Often, questions about delivery usually come after a customer has decided that this indeed is the product they want. We still do not know which drawing board Mr. Smith wants.

Mr. Smith then continues his order, saying:

OK. Now, we also want some drawing pens, ink and erasing fluid and ... er ... some drawing paper.



Only NOW has Mr. Smith made known exactly what he wants.

May then responds:

Ah ... now the lady who deals with drawing office supplies isn't here this morning, I'm afraid, but I'll ask her to give you a ring this afternoon, if you like.

Notice the way May tells Mr. Smith that she does not deal with the sale of these items.

She does say "I do not deal with those items". Instead, she tells him that she will contact the lady who does and have her call him.

"I'm afraid" is an expression which means "something is not possible" right now. (It can also mean it might NEVER be possible.) Other ways you can express something is not possible could be:

I'm sorry. At this time that might not be an option. (Maybe this can happen later.)

I'm afraid that we cannot do this at this time. (Maybe this can happen later.)

I hope you understand but this is not possible at this point in time. (Unlikely this will happen later.)

Mr. Smith confirms to May that he would like to be called by the lady who deals with office supplies:

Oh yes. Thank you.

Remember, it is always good to say "thank you" when somebody offers to do something for you.

May asks Mr. Smith for his telephone number so the office supplies lady can call him:

What is your telephone number, Mr. Smith?

And he gives this information, saying:

It's 2894 3838 extension 501.

Remember, you should always be sure to give your extension number when you want somebody to call you back.

May gives the name of the lady who will call and then gets back to the business of the drawing board, confirming the model she believes is the one Mr. Smith wants:

OK. I'll get Miss Leung to ring you this afternoon. Now, would you like me to place an order for one D045 drawing board?

May's belief that Mr. Smith wanted the D045 drawing board is correct as he says:

Yes please, if you would.

Other ways you can say this would be:

Yes, thank you, I would appreciate that.

Yes, I would, thank you very much.

May makes sure that she has the correct address and then verifies it with Mr. Smith asking:



Delivery and invoice to your address in Nathan Road, Tsimshatsui - is that right?

Obviously, May has the address of Mr. Smith's company, GPF Limited, in her computer. But it is always good to be sure, so the client is assured that the order will indeed come to him. Another acceptable tag question could be:

...Nathan Road, Tsimshatsui – correct?

Mr. Smith confirms it's correct, answering:

Yes, that's it. Thank you very much indeed. You've been most helpful. Goodbye.

He closes the conversation with a friendly tone, noting May's helpfulness.

And May confirms that the conversation is completed by saying:

Goodbye Mr. Smith.



Customer Service on the Phone

Dialogue 1

- Customer Service:* Sangsung Electrics, Customer Service Department. This is Angela speaking. May I help you?
- Peter Robson:* Yes, I've got a problem with my Sangsung amplifier.
- Customer Service:* Do you know the model number, sir?
- Peter Robson:* Yes. It's a SS6909.
- Customer Service:* Could you tell me what the problem is?
- Peter Robson:* The sound coming through the speakers is not at all clear.
- Customer Service:* It sounds like you almost certainly have a problem with your speakers rather than with your amplifier. Have you got Sangsung speakers as well?
- Peter Robson:* Yes. I have.
- Customer Service:* Are the speakers still under warranty?
- Peter Robson:* Yes. I think it expires sometime next month?
- Customer Service:* If you have the original receipt of purchase, you can take the speakers to our service centre in Wanchai. We'll have a look at them and see if they can be repaired or not. If we can't repair them, we'll replace the speakers.
- Peter Robson:* OK. I know you're in the AsiaBank Tower. Could you tell me which floor you're on and your opening hours?
- Customer Service:* We're on the 23/F, in Suite 2309. We're open during normal office hours.
- Peter Robson:* Do you have any idea how long it'll take to repair the speakers?
- Customer Service:* It usually takes between 7 and 14 days. We'll give you a call when the speakers are ready for collection.
- Peter Robson:* Right. I'll bring the speakers in this afternoon. Thanks very much for your help.
- Customer Service:* You're welcome. Goodbye



Dialogue 2

- A : *Cosmos Travel Ltd. Henry speaking. How may I help you?*
- B : *Hello, this is Paul Jenkins speaking. I'm calling about a holiday I booked through you. I have to say I'm not at all happy with your description of the hotel.*
- A : *I'm sorry to hear that, Mr Jenkins. We do check all the hotels in our brochure regularly and we try our best to keep descriptions as current as we can. May I ask what the problem was with your hotel?*
- B : *In your brochure you mention that the hotel is 100 metres from the beach, but in fact it was a 10-minute walk. How did you manage to make an error like that? My wife can't walk well and the trek to the beach was a major inconvenience.*
- A : *Please accept my apologies if any error was made in our description, Mr Jenkins. If you could let me have your reference number, I'll bring up the details of your holiday.*
- B : *It's HJ8403 under the name of Nancy Jenkins.*
- A : *Yes, I can see your booking was at the Panorama Hotel in Koh Samui, Thailand. And I can see that we updated our description of that hotel in June last year.*
- B : *Well, clearly you didn't do it very thoroughly. I'd like to be compensated for this.*
- A : *I'm afraid I'm not in a position to authorise any compensation right now, Mr Jenkins, but I'll certainly look into the matter. If our description is found to be inaccurate, then we may be able to offer you something for the inconvenience caused to you.*
- B : *Fine. Well you have my contact details, don't you?*
- A : *Yes, we do. I'll look into it immediately and call you back.*
- B : *Thank you.*
- A : *You're welcome. And please accept our apologies once again, Mr Jenkins.*



Handling Customer Complaints

Introduction

When you speak on the telephone to customers, your voice represents your company to the caller. Without the benefit of using body language (handshakes, smiles, nodding your head, etc.), your tone of voice and customer service techniques are all you have to gain customer confidence.

You should always try to adopt a polite, friendly, helpful, efficient and professional tone when speaking on the telephone to customers. Using standard telephone expressions will make you sound polite and professional. Listening and taking the time to understand your customers will make you sound helpful and efficient.

Situation 1

DVD retailer, Music Box Ltd, have just received this letter of complaint from Albert Hui, one of their corporate customers. Read through the letter and consider how you would handle the complaint.

Dear Sir or Madam

Defective Music DVDs

On behalf of my company, Laces Ltd, I would like to make a complaint about a box of 300 music DVDs (order number 4223-GH-984) that we received from you on 23 April 20xx.

The DVDs were meant as a gift to our best customers to celebrate our company's 10th anniversary. For the past five years, we have built an excellent business relationship with your company, so naturally we asked your company to supply the DVDs. However, we are now very disappointed about the quality of your products.

The DVDs you supplied us are defective. We have received over 180 complaints which all say the same thing: there is an error in track one. Of course this caused us much anger and frustration.

That is why we are demanding both a refund and compensation for the damage to our relations with our customers.

Please contact us as soon as possible so that we can discuss the details.

Yours faithfully

*Albert Hui
Sales Executive*

After receiving the letter of complaint, Susan Tam from DVD retailer Music Box Ltd, telephones Albert Hui to discuss what compensation her company is willing to give. Pay particular attention to the language used by Susan when you have a look at the dialogue.



Dialogue 1

- Albert Hui: Laces Ltd. This is Albert Hui speaking. May I help you?*
- Susan Tam: Hello Albert. This is Susan Tam from Music Box Ltd.*
- Albert Hui: Oh. Hello Susan. How are you?*
- Susan Tam: I'm very well thanks. I've just this minute received your letter about the DVDs you bought from us on 23 September.*
- Albert Hui: Oh yes. It's been a real embarrassment to us. We've had so many complaints about them. That is why we're demanding both a refund and compensation for the damage to our relations with our customers.*
- Susan Tam: I really am very sorry about that. We ordered the batch as a one-off from the distributors and unfortunately because of time constraints we never had a chance to check them.*
- Albert Hui: Well, what are you going to do about it? We were using this opportunity to pay a special thanks to our customers on our 10th anniversary.*
- Susan Tam: Don't worry. I've spoken to my manager and he says that you will be given a full refund. Also, considering all the trouble this has caused you, we'll pay for a rush order of a further 300 DVDs for you.*
- Albert Hui: That's very good of you. I'm pleased you can see the situation from our point of view.*
- Susan Tam: You're an old customer of ours and it's the least we can do to smooth over the situation.*
- Albert Hui: Could I ask you a favour?*
- Susan Tam: Certainly. What is it?*
- Albert Hui: Could you also mail the DVDs to our 300 customers with a letter explaining the problem?*
- Susan Tam: Yes. We could do that. Would you be able to email me a Microsoft Access file with the database of your customers' addresses?*
- Albert Hui: I can send that over to you right away. When do you think you'll be able to mail out the DVDs?*
- Susan Tam: I'm fairly sure we could have them dispatched by the weekend.*
- Albert Hui: Excellent.*
- Susan Tam: Once again, I'm very sorry for all the inconvenience this has caused you.*



Albert Hui: *That's all right.*

Susan Tam: *Please call me if you have any further questions about this.*

Albert Hui: *I will. I'll send you that email in a few minutes. Goodbye.*

Susan Tam: *Goodbye.*

Notes

After Susan Tam receives Albert Hui's complaint letter she calls him right away to talk about what compensation her company is willing to give.

Albert answers the phone in a professional manner by giving his company name, his own name and a polite offer to help the caller. Let's see that again:

Laces Ltd. This is Albert Hui speaking. May I help you?

Notice also how Susan introduces herself. She says "This is Susan Tam from Music Box Ltd." We use "This is" followed by our name to say who we are. We don't say, for example, "I'm Susan Tam" or "It is Susan Tam." Note that we only say "This is" when we are speaking to someone on the phone.

Despite being unhappy with the DVDs they received from Music Box, Albert greets Susan in a pleasant manner. Albert knows that he's more likely to get the compensation he wants if he remains calm and pleasant.

By letting Albert know that she's only just received Albert's complaint letter, Susan is showing Albert that she is taking his complaint seriously. This is good business practice. Try to deal with complaints quickly as the longer they are left unresolved or ignored, the more impatient and annoyed the customer or client is likely to become. Respond to complaints promptly and efficiently.

Notice how Susan clearly references the complaint by stating the product involved and when it was bought:

I've just this minute received your letter about the DVDs you bought from us on 23 September.

This sentence illustrates quite nicely the difference between the present perfect tense and the past simple tense. Susan says "I've just this minute received your letter." Here she uses the present perfect tense, "I've received," because she's talking about an action which took place a short time ago but which still has significance. When we use the present perfect tense we never state when an action happened. On the other hand, when we use the past simple tense, the timing of a past action is clearly stated. Susan says "the DVDs you bought from us on 23 September." The date when the past action happened is stated in this clause and therefore the past simple must be used.

Albert starts off by making it clear to Susan how his business has been negatively affected. He then goes on to tell Susan exactly what he expects in terms of compensation. This is good practice. Since this is basically the start of a negotiation, you need to clearly indicate a starting point in terms of what you want. You may not always get it, but at least the other side is clear about your expectations.

Let's see Albert outline his position again:



Oh yes. It's been a real embarrassment to us. We've had so many complaints about them. That is why we're demanding both a refund and compensation for the damage to our relations with our customers.

In most circumstances you would avoid 'demanding' anything, but in this case Albert is justified in using such strong, direct language.

Susan is happy to admit her company's error and the first thing she does is give a sincere apology. She says:

I really am very sorry about that.

She could also have said:

*Please do accept our apologies for the mistake.
We do apologise for the problems we've caused you.
I'm really sorry to hear that.
I'm terribly sorry. This has never happened before.*

Following her apology, Susan briefly explains how the problem with the DVDs happened. Always keep your explanation of a problem brief as a lengthy explanation could further anger your customer – you'll simply be reminding him of the problem; the customer isn't interested in hearing excuses. He just wants you to acknowledge the problem, admit that the fault is yours, apologise and say what compensation you're going to give.

Albert gets to the point quickly by saying:

Well, what are you going to do about it?

Albert is clearly still quite annoyed despite receiving Susan's apology. He's still using rather direct language. He could have rephrased this slightly by saying:

*What action are you going to take?
What compensation are you going to give us?
How are you going to compensate us?*

When a customer complains, there's a good chance that they're going to be feeling annoyed or angry, so it's also important to calm them down. Susan uses the phrase "Don't worry" to achieve this. Then she explains exactly what her company is going to do about the situation and what compensation they are willing to give.

Albert finally begins to relax because he now knows he's going to be compensated. He shows his appreciation by saying:

That's very good of you.

Here are some other ways in which we could have shown his appreciation:

*I appreciate your understanding of our situation.
Thank you for your understanding.*

Susan goes on to say:

You're an old customer of ours and it's the least we can do to smooth over the situation.



By saying “it’s the least we can do” Susan means that this is the minimum action she can take to resolve the situation to the customer’s satisfaction

Albert is pleased with the arrangement suggested by Susan and is no longer in a demanding mood. However, it does make one more request. He first says:

Could I ask you a favour?

We use the phrase ‘Could I ask you a favour’ when we want someone to do something which might be a little difficult or time-consuming. This prepares them in advance for the request you are going to make. Then Albert makes his request. He says:

Could you also mail the DVDs to our 300 customers with a letter explaining the problem?

Albert uses the polite request format “Could you”? At this stage of the conversation, he’s more likely to get what he wants if he’s polite. Albert could have rephrased this by saying:

I would be grateful if you could mail the DVDs to our 300 customers with a letter explaining the problem?

I would appreciate it if you could mail the DVDs to our 300 customers with a letter explaining the problem?

And Susan agrees to his request in a positive manner saying:

Yes. We could do that.

If you’re going to say “yes” to a request, it’s best to say it positively. This will create an impression of cooperation and sincerity. Here are some other ways that Susan could have responded:

Certainly, I’ll do that for you now.

I don’t think that’s going to be a problem at all.

No problem. We can certainly do that for you.

Before you end a conversation of this type where you’ve admitted that the customer is justified in making a complaint, it’s good practice to apologise a second time. This will leave a lasting impression with your customer that you are sincere. You are more likely to keep your customer if you do so. Susan says:

Once again, I’m very sorry for all the inconvenience this has caused you.

She could also have said:

Once again, I’m very sorry for the trouble this has caused you.

I’d just like to apologise once more for the inconvenience this has caused you.

Susan ends the call in a polite and pleasant manner by inviting the customer to call her if he has any further questions. She says:

Please call me if you have any further questions about this.

It’s good practice to end a call on a positive and friendly manner. Here are a few other common ways to end a call. Try speaking out the phrases aloud:

Is there anything else you’d like me to do for you?



*Would you like me to do anything else for you?
 Please call me if there's anything else.
 Thank you for calling us about this matter.
 Thank you for bringing this to our attention.
 Please feel free to call me if you have any other questions.
 Please call again if you need any more help.*

Situation 2

In the next situation, Jane Booth telephones a mobile phone company to complain about an extra charge which has appeared on her bill. She terminated her 12-month contract with the company early and is liable to an early termination fee. Paul Thomas, a customer service representative for the mobile phone company takes the call.

Dialogue 2

Paul Thomas: Inter Communications Ltd. Paul Thomas speaking. How may I help you?

Jane Booth: Hello, this is Jane Booth speaking. I'm calling about an extra charge made to my account which I'm not happy about.

Paul Thomas: May I have your account number, Ms Booth?

Jane Booth: Yes, it's 7845758.

Paul Thomas: 7845758. Just a minute. Let me just pull up your records. (pause) OK, I've got it. Could you just confirm your address and post code, Ms Booth?

Jane Booth: It's 45 Greenwood Crescent, Rochester, 65748.

Paul Thomas: That's great. Right, could you tell me which charge you're referring to on your bill?

Jane Booth: I've just received my final monthly bill dated 12 April and in red print at the bottom of the page, it says \$245 has been charged to my account for early termination of my service.

Paul Thomas: That's right, Ms Booth. According to the terms of the contract you signed with us in June last year, if you terminate your contract with us within 12 months, you'll be liable to a contract breakage fee of \$245.

Jane Booth: Well, I strongly object to this. Nothing about the charge was explained to me when I signed up.

Paul Thomas: If you remember, Ms Booth, before you signed up with us, the terms and conditions were explained to you over the phone by one of our customer service representatives. Also, the conditions were outlined on the contract which you signed. We explained to you at the time that there was a 12 day cooling-off period and you were free to terminate the contract within 12 days if we wished. Under those circumstances, the termination fee would have been waived.



Jane Booth: I don't know anything about that. Can't you just waive the fee for me as I didn't understand the terms clearly at the time?

Paul Thomas: I'm afraid I'm unable to do that, Ms Booth. It's strict company policy to enforce the terms of our contracts. If we made an exception in your case, we would have to extend this to all of our customers in the same position as yourself.

Jane Booth: But I didn't know what I was signing?

Paul Thomas: I'm afraid I can't help you with this. There's nothing I can do. I apologise if you found the terms of the contract misleading.

Jane Booth: So what are my options?

Paul Thomas: You're very welcome to take this up with our legal department, but I believe they'll just reiterate what I've told you. Your other option is to finish your contract with us which expires in just under two months.

Jane Booth: What if I simply don't pay?

Paul Thomas: Well, you have 60 days in which to make the full payment. After that time, all overdue accounts are passed over to our collection department who will take the matter further.

Jane Booth: You mean they'll take me to court.

Paul Thomas: That is possible, Ms Booth, if you are unwilling to settle the payment.

Jane Booth: I see. OK, well I'm not happy about this. But I guess I'll just have to continue the contract then. Can you make the necessary changes to my account?

Paul Thomas: Certainly, Ms Booth. I'll do that for you right away.

Notes

In this situation we find it is the customer who is clearly negligent. In such cases, the person handling the complaint has no choice but to enforce company policy. When doing this, however, it is important to be firm, yet polite. The policy needs to be explained, or in this case, re-explained, clearly.

After confirming the customer's identity and determining the cause of the customer's complaint, Paul summarises the customer's position and liability regarding the early termination fee. He says:

That's right, Ms Booth. According to the terms of the contract you signed with us in June last year, if you terminate your contract with us within 12 months, you'll be liable to a contract breakage fee of \$245.

Paul refers Jane to the contract she signed the year before and outlines the contract term in question using a type 1 conditional sentence: "if you terminate your contract with us within 12 months, you'll be liable to a contract breakage fee of \$245." Such sentences are commonly used



when referring to the consequences of breaking the terms of a contract. Let's look at a couple more similar sentences:

*If you don't use your allocation of 300 minutes each month, you'll lose them.
If you lose or damage your phone, we won't be liable for the repair or replacement fee.*

Even after reminding Jane of the sign-up process she went through and pointing out that the conditions of the contract were explained to her verbally and in writing, and the fact that she was given a 12 day cooling-off period, Jane still objects to the fee she's been charged. She continues to request that the fee be waived. She says:

I don't know anything about that. Can't you just waive the fee for me as I didn't understand the terms clearly at the time?

This is now the time that Paul needs to say 'no' in polite terms. He says:

I'm afraid I'm unable to do that, Ms Booth.

We often use the phrase "I'm afraid" before giving bad news. This helps to soften the bad news. Here are some further examples:

*I'm afraid we can't process your application because you haven't signed it.
I'm afraid we're unable to send a technician to you until the 25th.
I'm afraid we can't settle your claim since your policy has expired.*

Paul follows this up by referring to company policy. He says:

It's strict company policy to enforce the terms of our contracts.

In cases like this, it's a good idea to refer to company policy. This shifts the focus from you to the company and makes the rejection or bad news sound a lot less personal. Here are some other ways of expressing this:

*It's not company policy to extend credit to our customers.
It's strict company policy to enforce settlement of customers' accounts within 90 days.
We always demand payment in full.
We never allow customers to change their policies until they've expired.*

When Jane says that she didn't know what she was doing, she was clearly admitting that she may have been wrong. But in business, ignorance and negligence are generally not accepted as good reasons. Again, Paul stresses his position and politely declines Jane's request. He says:

I'm afraid I can't help you with this. There's nothing I can do. I apologise if you found the terms of the contract misleading.

To make Jane feel a little better, he apologises for her not being able to understand the terms of the contract. Although he apologises, he makes it clear that he's only a customer service representative doing his job, and his job is to explain and reiterate company policy.

Conclusion



In the first situation, it was clear that the customer's complaint was entirely justified. Music Box had supplied defective DVDs because they had rushed the order without checking it. This had caused an old customer embarrassment at a time when it wanted to celebrate its 10th anniversary.

In such cases, the correct steps to take are:

- Apologise for the mistake and give a very brief explanation of how it happened.
- Calm the customer down and reassure them that you will take appropriate action to compensate them..
- If you are able to, offer additional compensation if requested by the customer.
- Finally, apologise once again to demonstrate your sincerity.

Following these steps will help you not only to keep your dissatisfied customers but to strengthen the relationship you have with them.

If, as in the second situation, the customer is clearly at fault because they have not read or have misunderstood the terms of a contact, the best practice is to politely say that you are unable to grant the customer's request due to company policy which applies equally to all customers. Always remain calm, friendly and polite. These are sensitive situations and need to be handled in a sensitive manner.

Additional Dialogue Transcript

A: *Janson Electrics. This is Tina speaking. How may I help you?*

B: *Mr Bonham here. I'm one of your customers. I've been coming to you for years!*

A: *Yes, Mr Bonham. What can I do for you?*

B: *I'm phoning to make a complaint. I'm really upset about the service I received from one of your sales staff.*

A: *Would you mind telling me what happened?*

B: *Well, I purchased this washing machine about two months ago but it has given me nothing but trouble ever since.*

A: *And did you report the problem to us?*

B: *When I explained this to the salesperson at the main branch last Friday, he told me that there was nothing he could do.*

A: *I can definitely see why that would be frustrating. Did you have your sales receipt?*

B: *No, I didn't. I lost it. That's another thing. He said that I was careless for losing it.*

A: *I'm sure that must have annoyed you, but I can assure you, Mr Bonham, that it's not company policy for our staff to speak to customers in that way.*

B: *I should hope not.*

A: *Don't worry, Mr Bonham. I'd be happy to help you with this. Could you give me your full name and address, please? I'll see if we have a record of your purchase in our system.*



- B: *It's Roger T Bonham, 45 Graveyard Rd, Rochester, 647362.*
- A: *Just a minute, sir. (pause) Yes, I see your name here in our computer. It looks as if you bought the machine second-hand from our main branch on 5 March.*
- B: *Yes, that's right.*
- A: *I can understand why you might be unhappy, but I'm afraid it states very clearly in our sales policy that second-hand machines are not covered under our warranty plan.*
- B: *I understand that, but the machine never worked. It never once finished a load of clothes without breaking down. I realize it's not under warranty, but it never even worked properly from the start!*
- A: *I do apologise for that, but did you report the problem to us immediately?*
- B: *No, I reported it after about a month. I was busy!*
- A: *Well, unfortunately, Mr Bonham, there's nothing we can really do about it now. According to the terms of the warranty on second hand items, any fault needs to be reported to us within 72 hours of purchase.*
- B: *I see. Well, that wasn't clearly explained to me at the time.*
- A: *Since you're an old and valued customer, Mr Bonham, let me speak to my supervisor and see if we can do anything for you on this occasion.*
- B: *Would you do that? Oh, I would really appreciate if you could do something.*
- A: *Certainly. I see we have your mobile phone number here. I'll call you back a little later this afternoon if that's OK with you.*
- B: *Yes, that's fine. Thank you very much for your help. I'll wait for your call then.*
- A: *Goodbye, Mr Bonham.*
- B: *Goodbye. And thanks again.*



Handling Difficult Requests

Introduction

In a perfect world, we'd never have to talk about problems or need to face difficult situations. But as we all know, discussing problems and finding solutions to problems are both necessary to maintain good business relationships. We shouldn't avoid these situations but look at them as an opportunity to improve business communication with colleagues and customers.

We cannot always say "yes" to a difficult request from a client or a colleague. Sometimes, it may not be possible to grant a request. At other times, a compromise may be reached. In such situations, the language and tone you use are important. You don't want to offend or upset the person making the request.

In this lesson, we'll use a telephone dialogue to illustrate how to deal with difficult requests without causing offence.

Situation

Wynn Newberry works for a Marketwatch Magazine, a fashion and style magazine that is holding a public event the launch of a new bar. He wants to print 10,000 publicity flyers to hand out at an upcoming event and as time is limited, he needs the flyers quickly. He calls Sara, his printer.

Dialogue

Sara : Good afternoon, this is Sara Tang. What can I do for you?

Wynn : Hi, Sara, it's Wynn at 'Marketwatch'.

Sara : Oh, hello, Wynn! How's it going?

Wynn : Fine, thanks. Actually I was calling to ask you a favour.

Sara : What kind of favour?

Wynn : Let me explain the situation. We've arranged this publicity launch for a new bar and it came together at the last minute. Anyway, we are doing an event in a few days and we were wondering if you could do a rush print job of a simple two-sided flyer for us.

Sara : OK, mmmm. How many fliers are you talking about?

Wynn : Well, we need 10,000. I know that's a lot, but it shouldn't be too complicated a job. We need it by the end of the week.

Sara : The end of THIS week? I don't know, Wynn. We're very busy.



Wynn : *I can completely appreciate that, Sara. I wouldn't ask if it wasn't extremely important to us.*

Sara : *Well, I'm afraid it's just not possible at the moment, Wynn. We're in the middle of two big jobs. You know our company policy is at least five days' turnaround. I'm afraid the earliest we could get it to you would be by next Thursday.*

Wynn : *Yes, I see. It's just that we put so much business your way and you usually do such a great job for us. We were just hoping that you could make an exception in this case. It's a very important launch for us and if we can't have it by this weekend at the latest, we'll have to send it somewhere else.*

Sara : *Well, hold on a minute and let me see what I can do. Just hold the line, Wynn (a couple of minutes pass) Hello. Are you there, Wynn?*

Wynn : *Yes, I'm here.*

Sara : *Well, how about if we get the fliers to you on Tuesday morning? I'm afraid that's the earliest we'd be able to deliver them to you.*

Wynn : *Wow, Tuesday, huh? Our launch is Monday night. I don't think that will work. Hey, wait a minute. If you deliver them on Tuesday morning, that means you'll finish the job on Monday before your close. Is that right?*

Sara : *Yes, that's right.*

Wynn : *Well, you guys stop printing at around 5.30 or so?*

Sara : *Yes, around that time.*

Wynn : *What if I send someone over to pick it up Monday evening before closing? It's cutting it very close, but if that's the earliest you can finish it. I have complete faith in you!*

Sara : *Yes, that would work. And if we finish earlier on Monday, we'll call you.*

Wynn : *Great! Otherwise, I'll send someone over at around 4.30 to pick it up. Is that OK?*

Sara : *Yes, that sounds fine. I will expect someone then.*

Wynn : *I really appreciate your help with this, Sara.*

Notes

Near the start of the conversation, Wynn let Sara know that he needs a favour from her. Let's see what he says:

Sara : *Oh, hello, Wynn! How's it going?*

Wynn : *Fine, thanks. Actually I was calling to ask you a favour.*



Wynn says “I was calling to ask you a favour.” A favour is something you do to help someone, and it’s normal to use a phrase like this before you actually say what the favour is. Here are some other ways of phrasing it:

*I wanted to ask you a favour.
Could you do me a favour?
Could I ask a favour of you?*

Sara responds “What kind of favour?” Before agreeing to do a favour for someone, you need to know what help they want, so you wouldn’t immediately state “yes” or “no” straight away.

Wynn explains that he needs a rush print job. He introduces this using the phrase “Let me explain the situation.” Let’s see that again:

Let me explain the situation. We’ve arranged this publicity launch for a new bar and it came together at the last minute. Anyway, we are doing an event in a few days and we were wondering if you could do a rush print job of a simple two-sided flyer for us.

If you have to make a difficult request or if you have a problem, it’s usual to explain the situation first. And we use phrases like “Let me explain the situation” to introduce the explanation or problem or situation. You could also say:

*The situation is this....
Here’s the problem.....*

Did you note how Wynn made his request? He didn’t just say “We’d like you to do a rush print job,” or even “Could you do a rush print job?” Wynn knows that this is a difficult request so he uses a very polite request phrase to match the difficulty of his request. He says “We were wondering if you could do a rush print job...” The phrase “We were wondering if you could...” is often used when making a difficult request. Here are some other polite request phrases you could use:

*Would it be possible to....?
We’d really appreciate it if you could.....
We’d be very grateful if you could....*

Let’s see how Sara responds:

OK, mmmm. How many fliers are you talking about?

Sara starts by saying “OK, mmmm” The purpose of this is to give her time to think and to let Wynn know that the answer is not “yes” at this point. She needs more information about the job before she can agree to it.

Wynn explains to Sara that the print job is urgent and he needs it completing by the end of this week. Sara is unable to agree to this. See how she refuses Wynn’s request.

Well, I’m afraid it’s just not possible at the moment, Wynn. We’re in the middle of two big jobs. You know our company policy is at least five days’ turnaround. I’m afraid the earliest we could get it to you would be by next Thursday.

Sara says “I’m afraid it’s not just possible at the moment.” It’s common to place the phrase “I’m afraid” or “I’m sorry” before giving bad news. It helps to soften the negative effect of the refusal. “I’m afraid” just means “I’m sorry.” You can politely refuse requests in a number of other ways:

I’m sorry but we just can’t do that.



I wish we could help you, but.....
I'm sorry, but I'm not in a position to do that.
I'm afraid we wouldn't be able to do that.

Always try to use softening phrases before refusing a request. A quick “No” is sure to give offence and in business we want to avoid that.

If you do refuse a request, it's polite to say why. Sara gives a brief explanation but she also points out company policy on the subject. She says “You know our company policy is at least five days’ turnaround.” Being able to state company policy allows the person refusing a request to place the blame on the company. Therefore, the refusal becomes less personal and less offensive. Here are some other ways of stating company policy:

Our company policy is to.....
It's not our company policy to.....
We always demand
We never allow.....

Wynn continues to explain how urgent the print job is and how important it is for his company to have it completed by a certain date. He also reminds Sara about how much business his company gives her. Sara clearly doesn't want to lose Wynn's business so begins to soften her position and seek a compromise. Let's see how she does this:

Sara : Well, hold on a minute and let me see what I can do. Just hold the line, Wynn (a couple of minutes pass) Hello. Are you there, Wynn?

Wynn : Yes, I'm here.

Sara : Well, how about if we get the fliers to you on Tuesday morning? I'm afraid that's the earliest we'd be able to deliver them to you.

When looking for a compromise, it's usual to make suggestions to find a solution or finalize a deal. Sara asks “how about if we get the fliers to you on Tuesday morning?” The phrases “How about if...” and “What about if...” are commonly used with suggestions. Let's see some examples:

How about if we increased our order?
What about if we offered you an extra 10% discount?
What we could do is offer more overtime to speed up production?
How would you feel if we paid extra for the servicing?

Sara tells Wynn that Tuesday morning would be the earliest she could finish the job. As she knows this is too late for Wynn, she uses the phrase “I'm afraid” again in her next sentence: “I'm afraid that's the earliest we'd be able to deliver them to you.” She's softening the bad news again. But at least she's getting closer to finding a compromise.

Wynn realizes that his staff could pick up the flyers from Sara's company early in the morning before the launch of the bar. He makes this suggestion to Sara:

What if I send someone over to pick it up Monday evening before closing?

He could have made this suggestion in a number of ways. For example:

How about if I send someone over to pick it up Monday evening before closing?
I could send someone over to pick it up Monday evening before closing.



Finally, Sara is able to agree to Wynn's request or acknowledge that his suggestion is a good one and would resolve the problem. She says:

Yes, that would work.

Here are some other phrases you could use when accepting a request.

We could accept that.

We could agree to that.

If your acceptance is conditional, you could say:

We could agree to that on condition that.....

We could possibly agree to that.

We might be able to agree to that.

Choose which phrase you use carefully depending on the situation.

Conclusion

In this lesson, you learned a number of common expressions to help make a difficult request, politely refuse a request, seek a compromise and finally accept a request.

In business especially, it's important to avoid being too direct when making and refusing a request, particularly when the request is difficult. Use polite, indirect language when making a request, and use softening phrases before declining a request. When declining a request, give an explanation and state company policy if you are able to. This helps to shift the focus from the individual to the company, making the situation less personal.

If there is room for compromise, try hard to find a solution acceptable to both sides.



Telephone Communication Problems

Part 1 (a Bad Line)

Introduction

We've become creatures of telephone habits. Having made and received thousands of telephone calls in our lifetimes, it is easy to assume that we have reasonable telephone skills. Most people do not even think there are any special challenges of telephone communication.

When all parts of the communications process work effectively together, telephone communication is clear and useful. Sometimes, however, even a well-practiced communication process can go wrong. Problems can occur in any of the following four parts of sending a message:

- Trouble sending: The sender doesn't speak clearly, speaks in a heavy accent or speaks too quickly. What happens to the message? Will it be received?
- Trouble with the message content: The message is confusing, disorganized or irrational. Is it likely that the receiver will understand what is being communicated?
- Trouble with the channel: There is background noise or a bad line. Will the message be transmitted effectively? Will it be received?
- Trouble with the receiver: The receiver is not listening closely, has fallen asleep or is distracted. Will the message be understood?

In this lesson, we're going to focus on trouble with the channel, where because of background noise or a temporary loss of signal, the message is sometimes lost or cannot be heard clearly.

Situation

Beatrice, from Sterling Associates, takes a call from a client, Dan Tomkins. Dan wants Beatrice to reschedule a meeting for him.

Dialogue

Beatrice: Good morning. Sterling Associates. This is Beatrice speaking. May I help you?

Dan Tomkins: Hi Beatrice. This is Dan Tomkins and I wanted to ask if you could reschedule (....line noise.....) for Tuesday.

Beatrice: Sorry? Mr Tomkins? We've got a bad line. Could you say that again, please?



- Dan Tomkins: Yes. I was wondering if you could reschedule my meeting with Philip Mar for Tuesday. We were supposed to meet tomorrow.*
- Beatrice: Oh, I see. All right, let me check his schedule. It looks like he's free on Tuesday at 2.30.*
- Dan Tomkins: Did you say 12.30? That won't work for me, I'm afraid.*
- Beatrice: No, no. I said 2.30.*
- Dan Tomkins: Oh, OK. Sorry, it's so noisy here I can barely hear you. 2.30 would be perfect, actually. Will you (...line noise.....) today?*
- Beatrice: Sorry, Mr Tomkins. Could you repeat that? And, could you speak a bit louder?*
- Dan Tomkins: Will you see Phillip today?*
- Beatrice: Phillip. Yes, I'll see him today.*
- Dan Tomkins: I'd also like it if he could (...line noise.....).*
- Beatrice: Sorry. I missed that. What would you like Phillip to do?*
- Dan Tomkins: OK. Sorry about that. I'm stepping outside. (pause) Is the line any better?*
- Beatrice: Yes! Much better. You'd like him to do what?*
- Dan Tomkins: Email me the minutes from the last meeting. I'd like to see them before I meet him.*
- Beatrice: Sure, I will tell him!*

Notes

Beatrice answers the call with a standard opening. She says:

Good morning. Sterling Associates. This is Beatrice speaking. May I help you?

She states the name of the company, her name and asks if she can help. Note that it is usually optional for a secretary or receptionist to give their name.

Let's practice answering the phone on behalf of a company.

Newton Supplies Ltd. This is Donald speaking. How can I help you?

T1 Lighting. How may I help you?

Denzo Dashboards. This is Ken speaking. May I help you?

While Dan is giving the reason for his call, some noise on the line prevents Beatrice from hearing him clearly. Let's see Dan again. See if you can hear everything he says.

Hi Beatrice. This is Dan Tomkins and I wanted to ask if you could reschedule (...line noise.....) for Tuesday.



If someone is talking from a far off location or on a mobile phone, there can often be interference on the line. If you can't hear someone clearly or miss all or part of what they have said, it's important that you ask them to repeat it. Beatrice says:

Sorry? Mr Tomkins? We've got a bad line. Could you say that again, please?

If there is a problem, the first thing you should say is say "sorry". In British English, we say "sorry" to politely tell someone that we haven't heard what they have said. So using "sorry" in this context is not apologizing. Native speakers will understand exactly what you mean.

Next, it's important to inform the person you're speaking to that you've got a communication problem. Beatrice says: "We've got a bad line." Depending on the problem, there are a number of things you could say.

*Sorry. We've got a bad line.
Sorry. It's a bad line.
Sorry. You're breaking up.
Sorry. The line keeps cutting out.
Sorry. There's a problem with the line.
Sorry. It's so noisy here.*

After explaining the problem, ask the other person to repeat what they've said or speak louder. Beatrice asks: "Could you say that again, please?" Let's practice asking for repetition.

*Sorry. Could you say that again, please?
Could you repeat that, please?*

Sometimes, in addition to explaining a problem with the line, you may want to tell the other person that you can't hear them clearly, perhaps because there's a lot of noise around you. In that case you might say:

*Sorry. I can't hear you clearly.
Sorry. I didn't catch that.
Sorry. I missed the last part of that.
Sorry. I missed that.*

Let's see the next exchange from the dialogue:

Beatrice: Oh, I see. All right, let me check his schedule. It looks like he's free on Tuesday at 2.30.

Dan Tomkins: Did you say 12.30? That won't work for me, I'm afraid.

Beatrice: No, no. I said 2.30.

Here, Dan mishears the time when Phillip Mar will be free. He thinks Beatrice said 12.30. He's not totally sure about the time, so he checks if this is correct. He asks: "Did you say 12.30?" It's very important to make sure you've heard the right information. If you have any doubt at all, check by stating what you think you heard. Turn it into a question.

*Did you say 5pm?
Was that Tuesday?
You'd like him to email you what?
Sorry, Mr Field, was it?*



Dan later explains that he's speaking from a noisy place and can't hear Beatrice clearly.

Dan Tomkins: Oh, OK. Sorry, it's so noisy here I can barely hear you. 2.30 would be perfect, actually. Will you (...line noise.....) today?

Beatrice: Sorry, Mr Tomkins. Could you repeat that? And, could you speak a bit louder?

Dan is talking from a noisy place and Beatrice is having problems with the line. Beatrice again asks Dan to repeat what he's said. She asks: "Could you repeat that?" She also asks Dan to speak louder by saying: "Could you speak a bit louder?" Another way of asking someone to speak louder is to ask them to "speak up". Let's practice this:

*Could you speak a bit louder?
Could you speak up a bit?*

In the final exchange, Dan realises the line might be better if he goes outside.

Dan Tomkins: I'd also like it if he could (...line noise.....).

Beatrice: Sorry. I missed that. What would you like Phillip to do?

Dan Tomkins: OK. Sorry about that. I'm stepping outside. (pause) Is the line any better?

Beatrice: Yes! Much better. You'd like him to do what?

Before Dan steps outside, Beatrice states the problem again by saying: "Sorry. I missed that." She knows Dan wants Phillip to do something but she didn't hear clearly what. So she checks this by saying: "What would you like Phillip to do?" Always check if you don't hear something clearly.

Dan tells Beatrice he's stepping outside to try and get a better line. Once outside, he checks if there's any improvement by asking: "Is the line any better?" Beatrice confirms by saying: "Yes! Much better." Let's practice a couple of mini-exchanges:

*A: Can you hear me now?
B: Yes. I can hear you fine now.*

*A: Is the line any better?
B: Yes. Much better.*

Conclusion

If you experience communication problems on the phone, it's important to make the other person aware of the problem. So, first tell them what the problem is.

Communication problems often arise because one or both speakers are in a noisy environment, in which case you need to ask the other person to speak louder (or speak up!). They can also arise because of a noisy line or a line which keeps breaking up, in which case you need to ask the other person to repeat what they've said.

If you think you haven't clearly heard what someone has said, it's very important, especially in business, to check back. Check and confirm that you've got it correct.



After listening to this lesson, you'll know that there are number of standard phrases to help you state and explain a problem, to ask someone to speak up and to repeat what they've said. Try to learn these phrases and practice using them when you talk on the phone at work.

Additional Dialogue Transcript

- A: *Sales Department. This is Anna speaking. How may I help you?*
- B: *Hello. This is Keith Robertson of Inco Consultants. I'd like to place an order, please.*
- A: *OK, Mr Robertson. I'm ready to take your order.*
- B: *Sorry. It's a bad line. Could you repeat that?*
- A: *I said I'm ready to take your order now.*
- B: *Right. I'd like 30 reams of A4 paper.*
- A: *Sorry. I didn't catch that. Could you speak a bit louder?*
- B: *We need 30 reams of A4.*
- A: *OK, 30 reams. Got that. Anything else?*
- B: *Yes. We also need 4 drums of photocopier toner.*
- A: *You want 4 drums of what?*
- B: *Of photocopier toner.*
- A: *Toner. OK. Got it.*
- B: *And 40 lever arch files.*
- A: *Sorry. Could you say that again, please?*
- B: *I'm on the mobile. I'll just step out to see if I can get a better signal. Can you hear me better now?*
- A: *It's a little better. Could you repeat your last order?*
- B: *40 lever arch files.*
- A: *Sorry. What 40 kind of files?*
- B: *Lever arch.*
- A: *OK. Let me repeat your order: 30 reams of A4 paper; 4 drums of photocopier toner; and 40 lever arch files. Would that be all, Mr Robertson?*
- B: *Yes. That's all. Could you put that on our account?*



A: *Certainly. I'll do that. You should receive the order by tomorrow afternoon.*

B: *Thanks very much. Bye.*



Telephone Communication Problems

Part 2 (an Unclear Message)

Introduction

We've become creatures of telephone habits. Having made and received thousands of telephone calls in our lifetimes, it is easy to assume that we have reasonable telephone skills. Most people do not even think there are any special challenges of telephone communication.

When all parts of the communications process work effectively together, telephone communication is clear and useful. Sometimes, however, even a well-practiced communication process can go wrong. Problems can occur in any of the following four parts of sending a message:

- Trouble sending: The sender doesn't speak clearly, speaks in a heavy accent or speaks too quickly. What happens to the message? Will it be received?
- Trouble with the message content: The message is confusing, disorganized or irrational. Is it likely that the receiver will understand what is being communicated?
- Trouble with the channel: There is background noise or a bad line. Will the message be transmitted effectively? Will it be received?
- Trouble with the receiver: The receiver is not listening closely, has fallen asleep or is distracted. Will the message be understood?

In this lesson, we're going to focus on trouble with the message content, that is, the message is unclear and needs clarifying.

Situation

Beatrice from Sterling Associates answers a call from Bill Rock, a colleague working in an overseas office of the company.

Dialogue

Beatrice: Good morning. Sterling Associates. This is Beatrice speaking. How may I help you?

Bill Rock: Hi, Beatrice. This is Bill Rock. I need to find out about a package that was sent from your office last Thursday.

Beatrice: All right. Do you mean a package that was sent to you?



- Bill Rock:* Yes, I do. It was sent to me, Bill Rock, in the Milan office. But the delivery company has no record of it, though the Sterling Office told me it was sent last Tuesday.
- Beatrice:* And which department sent it to you?
- Bill Rock:* I think it was the production department, but I'm not sure. It might have been R&D that sent it.
- Beatrice:* Are you saying that you didn't get a confirmation number after it was sent? We generally call the customer with that number after it has been sent out.
- Bill Rock:* So every package has a confirmation number? Oh, no, I don't think so. But now that I think about it, I wonder if it was sent because there was a question about one of the specs I wanted.
- Beatrice:* So it wasn't sent?
- Bill Rock:* Uhhh. You know, maybe not. Sorry. Can you check on that for me?
- Beatrice:* OK, let me just make sure I understand here: you were expecting a shipment from either Production or R&D and now you think maybe it wasn't sent after all. Is that right?
- Bill Rock:* Yes, that's right. Maybe not. Because of a spec problem. When I sent the order online, I had written to hold the shipping if there was a problem.
- Beatrice:* So you mean you didn't actually talk to anyone in the office?
- Bill Rock:* No, I didn't mean that. I just sent the order online. Are you telling me that this makes a difference?
- Beatrice:* Maybe. I'm not sure, actually. I'll take your name and number and call you back once I track down the package, OK, Mr Rock?
- Bill Rock:* And you'll call me back today?
- Beatrice:* Yes, I will.

Notes

In this dialogue, Beatrice doesn't have a problem with the line and hears Bill clearly. However, sometimes she doesn't fully understand what he means or what he may be referring to. Whenever this happens, she asks for clarification.

Let's see again the first time Beatrice asks for clarification:

- Bill Rock:* Hi, Beatrice. This is Bill Rock. I need to find out about a package that was sent from your office last Thursday.
- Beatrice:* All right. Do you mean a package that was sent to you?



Bill is a little vague about the package since he doesn't state who it was for. Although the company sends out a lot of packages, Beatrice is 90% sure that Bill is talking about the package sent to him, but since she's not 100% sure, she asks for clarification by saying: "Do you mean a package that was sent to you?" If you are in any doubt at all, always ask for clarification. The most common phrase used to ask for clarification is "Do you mean...." Let's practice using the phrase:

*Do you mean that the meeting has been postponed or cancelled?
Do you mean that Jack can't attend or will come later?
Do you mean that we should close down the system completely?
Do you mean that they want a totally new design?*

There are a number of standard phrases we can use to ask for clarification in addition to "Do you mean...?". See if you can identify the clarification phrase Beatrice uses in the next exchange:

Bill Rock: I think it was the production department, but I'm not sure. It might have been R&D that sent it.

Beatrice: Are you saying that you didn't get a confirmation number after it was sent?

This time Beatrice clarifies using the phrase: "Are you saying that...?" This phrase is used in exactly the same way as "Do you mean that...?" So she could have said: "Do you mean that you didn't get a confirmation number after it was sent?" Here are some examples:

*Are you saying that the meeting has been postponed or cancelled?
Are you saying that Jack can't attend or will come later?
Are you saying that we should close down the system completely?
Are you saying that they want a totally new design?*

What's the best way to respond when someone asks "Do you mean that...?" Or "Are you saying that...?" If the answer is positive, just say "Yes," or "Yes. That's right." If the answer is negative you can say "No, I mean that..." Or "No, I'm saying that..."

Returning to the dialogue, let's see the next exchange:

Bill Rock: But now that I think about it, I wonder if it was sent because there was a question about one of the specs I wanted.

Beatrice: So it wasn't sent?

When Bill says "I wonder if it was sent ..." it means he's not completely sure if it was sent. Beatrice, therefore, uses a statement which sounds like a question to clarify whether or not the package was sent at all. She asks: "So it wasn't sent?" The statement often starts with the connective "so." Look at these examples:

*A: I'm not entirely sure if they're going to agree to our terms.
B: So we haven't got the contract yet?*

*A: It's possible that we'll do the training ourselves.
B: So we have trainers with the necessary expertise?*

*A: We haven't had a definite answer from them about their cooperation in the proposed venture.
B: I see. So the venture might not go ahead?*



Another technique commonly used to clarify information is to repeat back what you've heard and then check if it's correct. Let's see Beatrice do that:

OK, let me just make sure I understand here: you were expecting a shipment from either Production or R&D and now you think maybe it wasn't sent after all. Is that right?

Before repeating the details back to Bill, Beatrice uses the introductory phrase "let me just make sure I understand here" to indicate that she'll need some clarification. And, after repeating back the details, she asks "Is that right" to check if the information is correct. Here are two similar examples:

Let me just make sure I understand here: we're currently making a loss of about \$45,000 a month. Is that right?

Let me make sure I've got this right: the conference might have to be rescheduled. Is that correct?

Let's see one final exchange from the dialogue:

Beatrice: So you mean you didn't actually talk to anyone in the office?

Bill Rock: No, I didn't mean that. I just sent the order online. Are you telling me that this makes a difference?

This time Beatrice uses the phrase "So you mean..." to clarify what Bill has just said. What's the difference between "Do you mean..." and "So you mean..."? If you're almost certain you understand, you would use the statement form "So you mean...?" phrased as a question. If you are unsure about the meaning, you would use the question "Do you mean...?" Therefore, "So you mean..." is used to both clarify and check information.

In the exchange you just listened to, Beatrice's understanding was incorrect and Bill replied "No, I didn't mean that" to indicate this. Often, though, we just say "yes" or "no" to answer questions like this. Here are some further options. Practice these phrases:

*Yes, that's right.
That's correct.
Yes, that's what I mean.
Yes, I meant that.
Right.
Exactly.
No, I didn't mean that.
No, I'm not saying that.*

Conclusion

In business, it's essential that we understand correctly the information we are given. If you are in any doubt, you need to ask for clarification. Getting the wrong information can be costly for your business.

In this lesson, we have pointed out a number of useful phrases and techniques to help you to clarify what someone has said or what they mean exactly.



Additional Dialogue Transcripts

- Amy: *Rolland Sports Supplies, Telford Road Branch. This is Amy speaking. How may I help you?*
- Ron: *Hi Amy. This is Ron Thomas from Head Office. I'm just phoning to check on your sales figures for December. Do you have them at hand?*
- Amy: *Hello Ron. Sorry, I didn't catch that. Which month did you say?*
- Ron: *For December.*
- Amy: *Yes, I have the December figures here.*
- Ron: *How do they compare year-on-year?*
- Amy: *Sorry, what do you mean by year-on-year?*
- Ron: *I mean how do the December 2009 figures compare with December 2008 figures?*
- Amy: *Oh, I see what you mean. Um... well, they are up 10% compared to last year.*
- Ron: *That's good. And which income streams contributed most towards the increase?*
- Amy: *Income streams? Do you mean the income from just the sporting goods we sell?*
- Ron: *No. I'm talking about the revenue we received from the sales of all the different products in your store.*
- Amy: *OK. I understand. Well, sales of sports clothes were the main contributor. In fact sales were up 55% compared to last year.*
- Ron: *Let me just check I've got that right. Are you saying that sports clothes sales were up 45%? Is that right?*
- Amy: *No, I'm saying that sports clothes sales were 55% up on last year.*
- Ron: *That's even better. And how about sports equipment?*
- Amy: *Sorry, could you repeat that?*
- Ron: *What about sports equipment?*
- Amy: *Yes, sales of equipment fell slightly, by just 5%.*
- Ron: *That's strange. I thought it was selling well. Any ideas why it isn't?*
- Amy: *Are you asking me if I know the reasons why the sports equipment isn't selling so well?*
- Ron: *Yes.*
- Amy: *I'm afraid I don't.*



Ron: Well, could you look into it for me, and let me know at our meeting on the 12th?

Amy: On the 12th. Don't you mean our meeting on the 15th?

Ron: Yes, of course, on the 15th.



Teleconferencing: Communication Problems

Introduction

In the modern business world, teleconferencing is an essential means through which business associates in different places communicate with each other. Teleconferencing may be done through audio or both audio and video channels, and is a cost-effective way of conducting business meetings with colleagues and associates who are in different parts of the same country or the world.

Because teleconferencing is dependent on long-distance communication and sometimes unreliable technology, problems in communication can often arise. For example, participants may not be able to hear each other because of audio problems. Also, a frequent concern is that native speakers of English tend to speak very quickly, and non-native speakers may find it difficult to follow what they are saying over a conference call. In such cases, it is useful to know how to interrupt politely, ask for clarifications, and handle general problems in communication.

Situation 1

This teleconference has three speakers who are all from the same company, but work in different locations. Jack, a senior level associate at a global insurance agency, is facilitating the teleconference from his office in London. The participants are Jack's colleagues Michelle from Hong Kong and Patrick from Edinburgh.

Dialogue 1

Jack: Thanks Michelle, for joining us from Hong Kong, and Patrick, for being present from our Edinburgh office. I'm Jack, and I'll be facilitating the call from London. If everyone's all set, let's get started. Michelle, are you ready?

Michelle: Hi Jack, I'm all set.

Jack: Great. Patrick?

Patrick: I'm good to go.

Jack: Right, thanks. We should be done in around forty-five to sixty minutes. I hope you have a copy of the agenda I sent across by email earlier.

Patrick: Yes, got it, thanks.

Michelle: I've got mine too.

Jack: Excellent. The first item is a matter of some concern. As you can see from the figures on the first slide, there seems to be quite an upsurge in the level



of fraudulent claims we've received this year. Michelle, I'd like you to start by giving us the statistics on that from the Hong Kong office.

Michelle: Thanks Jack. Well, the figures from the last quarter don't look good. We've had a 13% increase in unsubstantiated claims, and...

Patrick: If I may interrupt, what exactly do you mean by unsubstantiated claims? Aren't we discussing fraudulent claims here?

Michelle: Well yes, but many fraudulent claims are unsubstantiated, right?

Jack: I believe Michelle is referring to claims that are unsubstantiated and believed to be fraudulent. Is that right, Michelle?

Michelle: That's right, Jack.

Jack: Patrick, you could use the 'raise hand' icon on your VoIP system there when you want to clarify something during a presentation.

Patrick: Oh, right. I didn't know that could be done.

Jack: Please go on, Michelle.

Michelle: Thanks Jack. As I was saying, the figures show that we need to step up our field investigation processes to create greater percentages of verifiable claims. The pie diagram on this next slide shows that these percentages have been falling steadily over the last year. Yes, Patrick?

Patrick: I just wanted to clarify if these figures are directly proportional to the --

Michelle: Sorry, Patrick, I can't hear you very well.

Jack: Patrick, are you using a headset?

Patrick: No, I'm on a mic.

Jack: You might want to put on a headset -- do you have one handy?

Patrick: Yes, just give me a second.

Notes

Jack begins the meeting by introducing himself and the other participants, and welcoming them to the meeting. He also checks if the other participants are ready, and if everyone can hear each other. Let's have a look at the beginning again:

Jack: Thanks Michelle, for joining us from Hong Kong, and Patrick, for being present from our Edinburgh office. I'm Jack, and I'll be facilitating the call from London. If everyone's all set, let's get started. Michelle, are you ready?

Michelle: Hi Jack, I'm all set.

Jack: Great. Patrick?



Patrick: I'm good to go.

Since a teleconference is very dependent on the technical set up that each participant has, it's important to check all the equipment in advance so that there are no unexpected problems during the meeting. As the facilitator of the meeting, Jack is also the 'eyes' of the others, since the participants do not have access to non-verbal gestures and body language during a conference call. So he addresses each participant clearly by name while talking to them, so that everyone can keep track of who is being addressed.

After checking that the other participants' systems are working properly, Jack then begins the meeting. As we can see, a teleconference is structured very much like a regular business meeting that is conducted face to face. Jack begins by telling the others how long he thinks the meeting will last, and checking if the others have a copy of the agenda that he has sent them. He then goes on to address the first item on the agenda. He says:

The first item is a matter of some concern. As you can see from the figures on the first slide, there seems to be quite an upsurge in the level of fraudulent claims we've received this year.

We can understand from what Jack says that he is using an online whiteboard to show slides to the others. Whiteboards are often used in teleconferences so that all the participants can have easy access to slideshow presentations. Here, we see that Jack quickly summarises the content of the slide as well, so that the others do not have to waste time studying it closely to find out what it is about.

Secondly, we also hear Jack asking Michelle to address a specific topic. He says, 'Michelle, I'd like you to start by giving us the statistics on that from the Hong Kong office.' A teleconference has to be carefully structured and sequenced so that every participant gets enough time to say what they have to, and it is the facilitator's job to call on each person when it is their scheduled turn to speak. Jack uses the phrase 'I'd like you to start'. He could also have phrased it like a question by saying, 'Michelle, would you like to start by giving us the statistics on that from the Hong Kong office?'

Next, we have the first interruption in the call, which is from Patrick. Let's listen again to how he does that:

Michelle: We've had a 13% increase in unsubstantiated claims, and...

Patrick: If I may interrupt, what exactly do you mean by unsubstantiated claims? Aren't we discussing fraudulent claims here?

Patrick uses the phrase 'If I may interrupt' to begin his statement politely. He also quickly gives the reason for his interruption by saying 'Aren't we discussing fraudulent claims here?' Phrasing your point as a question can be a quick and useful way of asking for a clarification.

To prevent a time-consuming discussion on what Michelle means, Jack quickly steps in after Michelle's response to answer Patrick's question. He says:

Jack: I believe Michelle is referring to claims that are unsubstantiated and believed to be fraudulent. Is that right, Michelle?

Michelle: That's right, Jack.



Jack is also careful to check with Michelle if he is right about what she means. He then tells Patrick to use a specific feature on his conferencing system when he needs to ask a question. Let's have a look at how he does that:

Patrick, you could use the 'raise hand' icon on your VoIP system there when you want to clarify something during a presentation.

The moderator can also give such information at the beginning of the teleconference in case there are many people participating, to ensure that everyone knows how to use the technological features of their Voice-over Internet Protocol. Jack then asks Michelle to resume by saying 'Please go on, Michelle.'

Michelle uses the phrase 'as I was saying' to indicate that she is resuming from the point where she had stopped when Patrick interrupted her. Patrick has another question during her presentation, but this time he uses the 'raise hand' icon as Jack suggested. We know this because we don't hear Patrick saying anything but Michelle says, 'Yes, Patrick?', showing the others that she is stopping because someone wants to ask a question. Patrick begins his question by using the phrase 'I just wanted to clarify'. Similar phrases that can be used to make clarifications are 'Could you please clarify', 'I'd just like to know', and 'Can you please tell us'.

The next interruption is caused by a technological problem, since Patrick is speaking but the others are unable to hear him clearly. Michelle indicates this by saying, 'Sorry, Patrick, I can't hear you very well.' Let's have a look at that exchange again:

Patrick: I just wanted to clarify if these figures are directly proportional to the --

Michelle: Sorry, Patrick, I can't hear you very well.

Jack: Patrick, are you using a headset?

Patrick: No, I'm on a mic.

Jack: You might want to put on a headset -- do you have one handy?

Patrick: Yes, just give me a second.

Jack asks Patrick if he is using a headset. This shows us that Jack has some experience with teleconferences, and that he can quickly spot what the problem is. We also see that Patrick is prepared for technological problems, since he has a headset ready. Having back ups for technological equipment is essential during a conference call, since you should be prepared for technical difficulties. Problems with equipment should be solved quickly so that you don't hold up the call or keep others waiting.

Situation 2

This teleconference call also has three participants. Julie, a production designer at an interior design firm, is facilitating the call with her colleague Will and a prospective client, Anthony.

Dialogue 2



- Julie: Anthony and Will, I'd like to welcome you both to this discussion. Anthony is in this meeting as a representative of Li Merchants from Shanghai, and Will is my associate from the Manchester office. I'm Julie, and I'll be facilitating this discussion from our Hong Kong office.*
- Anthony: Thanks Julie, I'm looking forward to the discussion. Will, I'm happy to talk to you.*
- Will: Hi Anthony, glad to be a part of this.*
- Julie: Anthony, thanks very much for joining us today, and we hope that we can clarify your questions about the negotiation. I sent out a copy of the agenda by email earlier today. We've scheduled an hour for this discussion. The first item is to address Anthony's questions about his company's market needs. Anthony, would you like to tell us about those?*
- Anthony: Thank you Julie. Can I use the whiteboard for my slides?*
- Julie: Yes, of course. I've enabled your call so you can control the slide show yourself.*
- Anthony: Thanks Julie. Well, you can see here that we're the leading company in the Chinese garment market for western formal clothing for women, but our competitors are not very far behind us. We're looking for exciting new designs that will help us gain a wider margin in the market.*
- Julie: Thanks Anthony -- if we could just pause for a bit to look more closely at the details and brainstorm some ideas together. Will, I'd like your inputs on this.*
- Will: Well, Anthony, we've been thinking about Li Merchants' needs, and I believe our new range of formal wear for women will appeal to your market. We have --*
- Anthony: Pardon me for interrupting, but I'd just like to clarify if this range has already been released in the European market?*
- Julie: Will, could you respond to Anthony's question?*
- Will: Yes, it has, but we can offer you an exclusive deal on the Asian market.*
- Anthony: Thanks for clarifying that, Will.*
- Julie: Will, please continue.*
- Will: I have a couple of slides here that will show you some figures on how the new collection has taken the market by storm. Hold on, that isn't the right slide there.*
- Julie: How about the previous one -- is this the one you wanted?*
- Will: No, it seems to be going forwards instead of back to the previous one. Let me see if I can --*



Julie: Why don't you just give us a quick summary of the statistics, so that we can move on to the next item on the agenda?

Notes

Julie begins the discussion by welcoming the others to the conference call, paying particular attention to thanking Anthony for his participation, since he is representing a different company that is a prospective client of Julie and Will's company. Anthony and Will also greet each other. Let's have a look at that again:

Julie: Anthony and Will, I'd like to welcome you both to this discussion. Anthony is in this meeting as a representative of Li Merchants from Shanghai, and Will is my associate from the Manchester office. I'm Julie, and I'll be facilitating this discussion from our Hong Kong office.

Anthony: Thanks Julie, I'm looking forward to the discussion. Will, I'm happy to talk to you.

Will: Hi Anthony, glad to be a part of this.

Julie: Anthony, thanks very much for joining us today, and we hope that we can clarify your questions about the negotiation.

By exchanging pleasant greetings and introductions, the participants begin the meeting on a friendly note and help each other to feel welcome. It is important to be especially polite and friendly during a teleconference with people you've never met, since you cannot see the people you are being introduced to, and they cannot see you.

After introducing the agenda, Julie invites Anthony to tell the others about his company's needs. We see that a technical subject comes up here, since Anthony needs to use a slideshow. Let's see that again:

Anthony: Thank you Julie. Can I use the whiteboard for my slides?

Julie: Yes, of course. I've enabled your call so you can control the slideshow yourself.

Since Anthony is a client and plays a key role in the meeting's agenda, Julie as the facilitator has already ensured that Anthony can use the technical equipment the way he needs to. It's important to ensure that everything works properly in a teleconference, especially when people from other companies are present. Not anticipating such needs can leave outsiders with a poor impression of how your company works.

After Anthony has outlined the first item on the agenda, we see that Julie suggests that the participants brainstorm the issue together. She says:

Thanks Anthony -- if we could just pause for a bit to look more closely at the details and brainstorm some ideas together. Will, I'd like your inputs on this.

Brainstorming is an efficient way of getting everyone to participate in a teleconference. Many experienced facilitators use it as a means of getting everyone's attention, and breaking the monotony after a single person has been speaking for a while.



Anthony then interrupts Will to ask a question. Let's have a look at that again:

Will: I believe our new range of formal wear for women will appeal to your market. We have --

Anthony: Pardon me for interrupting, but I'd just like to clarify if this range has already been released in the European market?

Julie: Will, could you respond to Anthony's question?

Anthony interrupts very politely to ask a relevant question. As the facilitator, Julie steps in to ask Will to respond. By doing so, she is showing that she has accepted Anthony's interruption and wants to address it.

Shortly after, we see that Will runs into some trouble as he tries to show some slides.

Will: I have a couple of slides here that will show you some figures on how the new collection has taken the market by storm. Hold on, that isn't the right slide there.

Julie: How about the previous one -- is this the one you wanted?

Will: No, it seems to be going forwards instead of back to the previous one. Let me see if I can --

Julie: Why don't you just give us a quick summary of the statistics, so that we can move on to the next item on the agenda?

At first, Julie tries to help Will by showing a different slide, but there seems to be a technical problem with the slide display. Will wants time to resolve the issue, but Julie interrupts him.

Julie: How about the previous one -- is this the one you wanted?

Will: No, it seems to be going forwards instead of back to the previous one. Let me see if I can --

Julie: Why don't you just give us a quick summary of the statistics, so that we can move on to the next item on the agenda?

Sometimes presenters can get very caught up in the moment and become anxious about technical difficulties. Julie, as the facilitator, keeps calm and suggests that Will moves on by simply giving the others a quick summary of the statistics. It is important to remember that technical features like slideshows are only support systems, and you should be able to manage without them if necessary. Always be prepared to continue without your slides and graphics, and keep hard copies of all your information with you so that you can continue with your point in case there is a technical failure.

With Julie's interruption of Will, we also see that she does not use any specific polite phrase to break into what he is saying. This is because they are colleagues, and she can be less formal with him than with Anthony. Also, she phrases her suggestion as a question so that it seems softer and friendlier. She also reminds him that they should not waste time because the meeting needs to move on to the next item on the agenda. Through this, Julie shows that she is an efficient facilitator who knows how to keep the others focused on the agenda, and who keeps up the momentum of the meeting by quickly resolving a technical problem.



Conclusion

In this lesson, we saw that teleconferences can have two kinds of communication problems: technical issues, and interruptions by participants. It is important for all the participants to be prepared to face both kinds of communication problems.

Technical issues can be solved quickly if you anticipate the kinds of problems that can happen and check your equipment thoroughly before the teleconference.

Problems in communicating with other people can be handled by being prepared to face interruptions, knowing how to interrupt, asking for clarifications when necessary, and being able to respond to questions about your presentation.

Additional Dialogue Transcript

Peter: Let's look at the first item on the agenda. Gwen, would you like to start with your presentation?

Gwen: Thanks Peter. My report today is on the market trends the sales team has observed in.....

Matt: Sorry Gwen, I can't hear you very clearly.

Peter: Gwen, could you try moving a little closer to the microphone?

Gwen: Sure, just a second. Is this clearer?

Peter: Sounds fine to me now. Matt, can you hear Gwen clearly now?

Matt: Just fine, thanks. Peter: Please go ahead, Gwen.

Gwen: As I was saying, we've analysed the market trends over the last year, and have some recommendations for the new product. Can everyone see the first slide?

Peter: Looks fine to me, Gwen. Matt?

Matt: No problem here.

Peter: Please continue, Gwen.

Gwen: As you can see, the markets seemed to lose a little steam around January, but that's expected given the drop in consumer interests after the holiday season. We believe –

Matt: I'm sorry to interrupt, but how can we be sure that the drop in consumer interest wasn't because of the product itself? Aren't we assuming too much?

Peter: I think Gwen was just getting to that.

Gwen: Thanks Peter. Yes, Matt, as I was about to point out, the sales percentages did increase steadily in the last few months.





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Internal vs External Calls

Introduction

Creating the right tone when you speak on the telephone is important. When deciding upon the tone you need to adopt, you have to consider who you are speaking to, i.e. whether it is your boss, a colleague, a subordinate, a customer etc. This will help you to determine both the tone of your voice and the type of language you will use.

No matter who you are speaking to, you should always try to speak in a friendly tone. The type of language you use will determine how polite you are and how direct you are. A call with a colleague you know can obviously be a lot more direct than with a customer you have not met before.

Situation

Read through the two telephone conversations below. The first conversation is between colleagues while the second one is between a person representing a company and a customer. Both conversations are on the same topic. Notice how the addition of certain language in this conversation has helped to create a less direct, more polite tone.

Dialogue 1

To a Colleague (Direct)

A : *Jane Yip.*

B : *Peter Wang here. I'm calling about the delivery.*

A : *You mean the rotary spare parts?*

B : *That's right. They were due last Wednesday.*

A : *We telephoned you to inform you of the delay.*

B : *You did, but I want to know the new delivery date.*

A : *I thought we told you.*

B : *No.*

A : *Just a moment. I'll check ... You can expect them on Monday.*

B : *Are you sure?*

A : *Yes.*

B : *O.K. Goodbye.*



A : *Bye.*

Dialogue 2

To a Customer (Indirect)

A : *Jane Yip speaking. How can I help you?*

B : *This is Peter Wang here from Telefashion Ltd. I'm calling about the delivery of the spare parts.*

A : *Right. That would be the rotary spare parts, wouldn't it?*

B : *That's right. They were in fact due last Wednesday.*

A : *Yes, I'm very sorry about the delay. Did you receive a call to let you know there were problems with delivery?*

B : *Yes, I did but I would like to know the new delivery dates.*

A : *Oh, I'm sorry. I thought we'd already informed you.*

B : *Not as far as I know.*

A : *Just a moment. I'll check for you ... Right, we'll be delivering them on Monday.*

B : *Do you mind if I ask whether you are sure about this new date?*

A : *No, of course not. I can promise you, you'll have the parts on Monday.*

B : *Good, I'm pleased to hear that. Thanks very much. Goodbye.*

A : *Goodbye Mr Wang.*



Controlling Techniques

Introduction

When we have to use English as a second language to communicate, we can easily be at a disadvantage in our conversations with native speakers. If we are aware of that disadvantage we may lack confidence and so provide the people we are conversing with an opportunity to control dialogue in a way that stops us from achieving the outcome we need.

Situation

Nancy has regular telephone contact with a subsidiary company in the UK. One of her responsibilities is to co-ordinate a monthly management report on the performance of foreign branches and subsidiaries for Head Office. For this she needs regular information on orders, sales, stock, prices and trends from the overseas branches. Her UK contact is uncooperative and likes to make it plain that it is a waste of his time to compile these statistics every month. He knows that Nancy is hesitant in her use of English, so he easily controls the telephone conversations to prevent Nancy getting what she wants.

Dialogue 1

- Nancy: Hello, Michael. It's Nancy.*
- Michael: Hello, look I'm pretty busy just now so do you think you can make it quick?*
- Nancy: I'm sorry to disturb you. I just wanted to remind you about the monthly report.*
- Michael: Oh, that. Look, I haven't got much time at present. I'll let you have it as soon as I get a minute.*
- Nancy: I'd appreciate that Michael; it's two days late already.*
- Michael: Is it? You know, I really do have rather more important things to do than crunch numbers for you.*
- Nancy: I know it's a nuisance, but I really do need those figures.*
- Michael: Okay David. I've already said I'll do it as soon as I can. Now, if you don't mind, I'm pretty busy.*

Notes

In the first call Michael employs ways of blocking Nancy's intentions. Let's examine his tactics:



Michael begins by saying he hasn't got much time and so pushes Nancy into apologising for seeking something that Michael is in fact obliged to produce.

He uses unclear language to confuse Nancy. Nancy doesn't know how long she will have to wait for the information she needs.

He tries to belittle the importance of Nancy's request thus making Nancy feel that her job is somehow less important than Michael's.

Nancy has to first recognise how Michael is controlling the conversation and then learn strategies to counter this.

If Michael says he is too busy to talk, Nancy should either change her opening by asking Michael if it is a good time to phone, or she should ask Michael to suggest a time for her to call back.

When Michael uses unclear language, Nancy should suggest a specific time when he can produce the figures.

When Michael implies that Nancy's report is less important than his own, Nancy should remind him that the monthly report is a Head Office requirement and that she has her job to do just as Michael has his.

Situation 2

In the next dialogue Nancy achieves her objectives and makes it clear to Michael that he can't control the situation with manipulative language techniques.

Dialogue 2

- Nancy: Hello, Michael, is this a good time to talk or would you like me to call again later?*
- Michael: Oh, David. No, that's all right. Might as well talk now.*
- Nancy: I just wanted to remind you about the monthly report.*
- Michael: Oh, that. Look, I haven't got much time a present. I'll let you have it as soon as I get a minute.*
- Nancy: Okay, shall we say the day after tomorrow? It's already two day's late. I'll give you a ring to check that it's ready.*
- Michael: Oh, I suppose so. You know, I really do have rather more important things to do than crunch numbers for you.*
- Nancy: I know it's a nuisance, but Head Office insist on having the report on time. I've got my job to do too, Michael, and I can't finish my report without your figures.*
- Michael: Okay, Nancy. The day after tomorrow. Now I'd better get on.*

