

Program Policies and Procedures – I&R
Call Handling Procedures - Primary Call Handling Script
Updated: September 25th, 2014

1) General Call Handling Script

The following script should be used for all calls:

a) Use a tone of voice that is clear and appropriate

b) **Greeting** – identify yourself and the program:

“Hello/Bonjour 211. This is Alice speaking how may I help you”?

Or

“Hello/Bonjour NSM Health Line. This is Alice speaking how may I help you”?

c) **Establish Rapport** with the caller and use active listening skills and empathy to discern the presenting problem:

- Paraphrase, repeat what the caller is requesting in your own words
- Put yourselves in their situation, try to understand how they are feeling

“Is this the first time you have called us? Thank you for calling”.

d) **Understand Issues** – Clarify what the caller is looking for:

- Ask where they are calling from or where they need the services
- Determine if they have called other services
- Has this happen before
- Ask how they are doing personally – “are you ok?”
- Determine if there are any specific preferences or requirements, language needs, low cost services or access issues.

e) **Inform caller** what you are doing, make sure there are no long pauses during the conversation, for example:

“Let me see what I can find for you”

“I’m just having a look through my listings, it may take me a few minutes, I hope that is ok”

“are there culturally specific services you are interested in?” (These could be Francophone, Aboriginal, LGBTQ).

f) **Prioritize** the caller’s needs – walk them through the process if they have more than two action items or calls to make; ask them to repeat their next steps.

g) **Referrals** - Provide all information that caller will need – describe the service and eligibility requirements provided by the organization, include physical location, hours, fees, etc. when appropriate

- Do not provide personal advice – choose your words, DO NOT tell caller that they need to do this or that. Restate we do not recommend, we provide information about available services.

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- Ask if they have a pen and are ready to take down the information
- Don't rush, take time to speak clearly
- Confirm they have transportation to get there
- For private (business) services, ensure caller understands they may want to compare similar services, ask for references and a written quotes/cost

h) **Advocacy** - Determine if caller has ability (is confident enough) to follow through. Offer to warm transfer, or if advocacy support is needed.

"Would you like me to stay on the line and connect you?"

"Would it be helpful if I called the organization and I called you back?"

- The telephone number, first name of the inquirer, and permission (consent) are documented on the Advocacy Report Form.

i) **Follow up** – I&R specialists will request permission to follow-up with every caller presenting the following situations:

- Community Connection has already acted in an advocacy role
- You determine the caller to be, or due to lack of resources may become at-risk (considered a serious/likely threat to a person's health or safety) - for example: no access to available food, shelter, heat, or electricity, etc.
- You determine, or are not confident, the caller has the necessary ability to follow through and resolve their problems and may benefit from extended assistance – for example: caregiver burnout, illness, abuse, mental health related issues

"Could I call you back in a few days to see how you made out?"

"Would you call me back and let me know you are able to get the services?" Remind caller of your first name.

- The telephone number, first name of the inquirer, and permission to follow up are documented on the follow-up form.

j) **Service Quality Surveys** - – I&R specialists will request permission of callers to participate in a survey conducted by a third-party company. Use discretion, this is not requested for callers with outstanding needs or who are in situations where the request would be inappropriate.

"I'm wondering if you could help us out?"

"Would you participate in a 2 minute survey by a third-party company? They will call you in a few days and ask you questions about our service".

- Collect callers first name, telephone number, best time to call on SQS form

k) **Closing** – Clarify you have met their needs by asking:

- Is there any other information I can help you with?
- Thank you for calling.

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- Remember you can call back at any time:
 - i. 211 – we are always open, 24/7
 - ii. 310 – we are open every day until 8:30 pm.