

## Telephone Tips and Techniques that Can Help

Today the Internet is the medium of choice when researching information or trying to track down products and services, but no matter how much information you find on the Internet, sooner or later you'll have to pick up a telephone to find answers to your very specific questions or arrange for the services you need.

Whether calling government agencies, doctors' offices, disease specific service organizations, or insurance companies, more likely than not somewhere along the way you are going to have a frustrating experience. We all have stories about people who have been rude, people who don't seem to care, people who don't return phone calls, people who sound as if they come from Mars, people who sound like they want to help, but just don't have the answers you are looking for.

There are no magic solutions that will eliminate all the difficulties in finding information, making appointments, or getting past the menu of options that so often greet us on the telephone these days, but there are "tricks of the trade" that people who do telephone research on a regular basis and those that provide telephone support can teach us.

The following list of tips and techniques were compiled based on conversations that NFCA has had with reporters, customer service representatives, telephone support personnel and particularly persistent family caregivers. We hope they will help you find the information and resources you need in less time and with less frustration than you usually encounter.

### The Big 3

- **Be prepared**—Don't start the process when you're rushed. Relax! Make sure you have a big pad of paper, a pen, a glass of water, and a reasonable amount of time.
- **Don't give up**—You have the right to information and respectful service. Be persistent and patient. Realize that sometimes it will take ten calls to find out what you want. No one person or organization has all the answers.
- **Try not to put people on the spot**—It makes them defensive. Rather try to enlist their support. Remember, you usually catch more flies with honey than with vinegar.

## **Before You Pick Up the Phone**

- Review written material first, if at all possible. Underline key points, or names and phone numbers of people and organizations you think you'll want to call.
- For each encounter make a list of the questions you want to ask. Write them down.
- Be clear about what information you need. If you can't explain what you want, how can someone else tell you where to find it?
- Establish a system for yourself: a check can mean you got through to the person, a minus can mean you are waiting for a call back, and a star can mean you actually resolved your problem.
- Have a notebook or other organizer in which to record your information. Don't put it on little scraps of paper that can easily get lost. Try creating columns or headings at the top of the page: one for the name of the person, another for the name of the agency or company, another for the phone number, etc.
- "Psych" yourself to make the calls. Do a little role-playing first if it will help calm your jitters and put you in the right mood.
- Are you a morning person? If so, make your calls then. Know when you're at your best and most alert. There's no point in just getting started when you are already tired.

## **Making Your Calls**

There are many ways to coax the person on the other end of the telephone line into helping you. Here are a few of them:

- Be aware of the pitch of your voice. Try to make it lower. A voice in a high register apparently can be disturbing to many people.
- Be modest. Tell the person on the other end of the line that you're an amateur, and that you hope they can give you some guidance. Enlist sympathy and thereby, help.
- If you're calling someone you think you'll need to call again, try to establish a relationship. Find out the person's name and some personal things if at all possible. Next time you call you can reference them and you'll truly have an ally.
- Avoid yes or no questions. They don't open people up. Read the next two questions: "Do you know where I can find accessible bus service?" With this wording, yes or no is the only answer. This following phrasing creates the possibility of dialogue "Where can I find information on accessible bus service in our town?" The point is to always leave people room for suggesting possibilities.
- Be empathetic—"I realize it is late in the day and you must be tired, but I really need your help."

- Make the person feel like your mentor. Complement helpfulness, even if you didn't quite get what you needed. The next time you call people will be more likely to go out of their way to help you.
- If the person you want isn't in, rather than just leaving a call back number, find out when he or she is expected. This shows you want to make things easier—and you might be surprised to learn the person just left for a two-week vacation. If you hadn't asked, the information might not have been offered. If you are transferred to voice mail leave a short but specific message. It can eliminate the game of telephone tag.
- Be polite, but don't allow yourself to be brushed off. You have a right to information, especially from public agencies. If you've really tried to get help but are constantly meeting roadblocks, ask to speak to a supervisor.
- Always get the name of the person you are speaking to. It's helpful when you get conflicting information and you can say, "but so-and-so in the department of such-and-such said. Also knowing the person's name shows you really listened and puts you in control.
- Remember we still don't have videophones. You can cultivate any persona you wish. One day try making calls while wearing business clothes. Does it make you feel more in control, more authoritative? Another day wear comfortable jeans and a tee shirt—any difference? Whatever works for you, whatever makes you comfortable and gets results, is the right approach.

### **If At First You Don't Succeed...**

Getting information, breaking through bureaucratic log jams can be daunting. There often doesn't seem to be any rhyme or reason to the rules that have been established. When one approach doesn't work—try another. Be creative. Turn an idea on its head and try looking at it from another direction.

Remember you don't have to find everything out yourself—divide and conquer is a time-honored approach. Put the word out that you are looking for information or need help navigating the social service system. Ask a friend, colleague, or relative to lend you a hand — especially in a time of crisis. You'll be giving those who want to help a straightforward task they can sink their teeth into.

There is more than one way to get information or resolve a problem. It isn't always easy, and there are no guarantees, but if you follow at least some of the advice here, you just may increase your odds. ■