Customer Service Guidelines

THE BASICS

School Name: School of Architecture, Planning and Preservation
Website: http://arch.umd.edu  Tel: 301.405.8000  Fax: 301.314.9583

PHONE ETIQUETTE

How to answer the main line
Good (morning/afternoon/evening) School of Architecture, Planning and Preservation this is (your name) how may I assist you?

How to answer your personal line
Hello, this is (your name) or This is (your name)

Transferring calls
When transferring calls, wait for the other party to answer the phone, and then share the name and any pertinent information before connecting the caller

Vacation messages
If you will be out of the office, even for one day, you need to place a vacation message on your telephone. In the message, explain that you are out and provide a day of the week and date when you will return to the office. A similar message should be added as an auto reply for your email.

RESPONDING TO INQUIRIES | ACKNOWLEDGE - LISTEN - EXPLAIN - ACT

In-person inquiries
- Always ACKNOWLEDGE a visitor’s presence ASAP; LISTEN carefully to the inquiry; if you need to do something in order to satisfy the request, EXPLAIN your actions; and then ACT
- If you are on the phone, ask the caller to hold and acknowledge the person in front of you.
  - If your call is nearing a close, simply say, “I’ll be with you in a moment”
  - If your call is not nearing a close ask, “How may I help you?” Be sure to listen, and depending on the request, determine the best course of action. Some options include providing an answer, explaining the proper person to whom the
question should be directed and making the introduction, or asking the guest to “please bear with you for a moment” so you can conclude the call

Phone inquiries
- All calls should be picked up within 3 rings
- Don’t forget the person on the phone can’t see the line that may exist in front you, so if you have to place them on hold ask, “May I place you on hold?” and then wait for a response before holding the call
- If you can’t satisfy the request be sure to transfer or direct the call to the person who can - this may include explaining that the information is available on the website and then directing them on where exactly to find the information. You could also ask for an email address to send them direct links.

Email inquiries
- When receiving emails, pay close attention to detail and be sure to note all the questions that need response and then provide responses to all questions
- If follow-up is needed by you or another party, note that follow-up is needed, who will provide the follow-up and when an answer or additional information is expected
- Begin the email with a salutation and conclude with a closing regard (i.e. thank you, best regards, we look forward to seeing you at the open house on March 26)
- Ensure that the subject line is pertinent to the contents of the email. Often email strings transition from topic to topic, so make it a practice to always update the subject line to reflect the current exchange
- Avoid sending emails that don’t add value,
  - We are all maneuvering through several emails a day so let’s make a conscious effort to only send emails that provide needed information or change in status updates

*Guidelines based on staff training provided by the School’s Communications Director*