


# 10 STEPS

## to TAKE a Proper Message

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CREATED BY  
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Taking messages for others is a common activity for anyone answering phones. While it may seem like a simple and straightforward task, it still requires some coaching.

This 10-Step Process will leave your callers 100% satisfied with the thoroughness of your team, while also ensuring all of your messages are 100% complete!

Once the caller asks for a person who is unavailable:

### Explain

# 1

Let the caller know the reason you need to take a message.



**EXAMPLE:**

"Mr. Miller, I do apologize, but Nancy from our billing department is out of the office today, so I will need to take a message for her. She will return the call as soon as possible. Is that okay?"

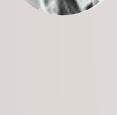
"Yes that would be fine."



### Capture

# 2

Ask for the caller's first and last name.



**EXAMPLE:**

"Can I please have your first name?"

"Michael."



"And can I please have your last name?"

"Miller."



### Confirm

# 3

Repeat back the first and last name to ensure you have it written down correctly.



**EXAMPLE:**

"So that's Michael Miller, correct?"

"Yes it is."



### Get Digits

# 4

Ask for the caller's phone number.



**EXAMPLE:**

"Thank you Mr. Miller. Now can I please have the best phone number Nancy can reach you back on?"

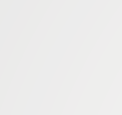
"That's 212-555-1212."



### Confirm

# 5

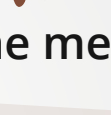
Read the phone number back to ensure you have it written down correctly.



**EXAMPLE:**

"I have that written down as 212-555-1212, is that correct?"

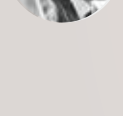
"Yes, that's correct."



### Message

# 6

Ask for the message.



**EXAMPLE:**

"And can I please have the message you would like me to deliver for Nancy?"

"Please have Nancy look up my bill from November to confirm that the charges are correct, as they look incorrect to me."



### Recite

# 7

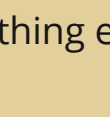
Read the message back in entirety to ensure you have it written down correctly.



**EXAMPLE:**

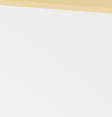
"Okay. So your message is to have Nancy take a look at your November bill to ensure all of the charges are valid. Do I have that written down correctly?"

"Yes."



"And is there anything else you would like to add to the message?"

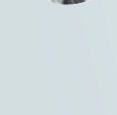
"No, that will be all."



### Schedule

# 8

Find out the best day and time for a return call.



**EXAMPLE:**

"Fantastic. I have gotten that message written down correctly for you Mr. Miller. And what is the best day and time for a call back?"

"I can be reached tomorrow afternoon at 3pm or so."



### Assure

# 9

Let the caller know their message will be delivered right away.



**EXAMPLE:**

"I am going to get this message over to Nancy right away and let her know that you would like a call back tomorrow at 3pm. Is there anything else I can do for you today Mr. Williams?"

"No, that's it. Thank you."



### Thank

# 10

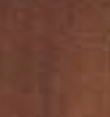
Thank the caller for their time and end on a positive note.




**EXAMPLE:**

"Thank you so much for calling today Mr. Williams. I hope you have a wonderful day!"

"You too. Good-bye"



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**yestrak** 

YesTrak ensures that your callers never get voicemail (80% of people hang up on answering machines...meaning you probably do, too). Simply put, if you're using voicemail, you're losing money. With 250 live agents here in the US ready to professionally care for your clients, you never have to worry about phone coverage again.

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