

How to Make Effective Business Phone Calls

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Co-authored by [Michael McCutcheon, Ph.D](#) and 19 contributors

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Making business phone calls can feel a little nerve-racking, especially given how much communication now happens digitally. Nothing can quite replace the sound of a human voice, however, and sometimes it's just more convenient to place a call. As long as you speak politely and naturally, anyone can handle the basics. But to make the call as effective as possible, you need to identify its purpose before you pick up the phone, and keep this in mind while you talk.

Part
1

Preparing for a Call



1 Identify the specific purpose of your call. Knowing exactly why you want to speak with someone will stop you from feeling nervous about bothering them or wasting their time, or even just rambling. Before you make the call, reflect for a minute on its purpose, and jot it down. For instance, you might think:^[1]

- Do you need to get information?
- Do you want to sell something, or convince the person of an idea?
- Do you need to ask for the person's help or support?



2 Prepare bullet points for the things you need to mention. Having an agenda for what you want to talk about will help keep your call on track.^[2] The “cheat sheet” can also help you feel more confident, since you won’t forget what you need to mention. For instance, if you are calling to ask someone for a meeting, you might jot down:^[3]

- The purpose of the meeting.
- When and where the meeting will take place.
- What the person might need to do before the meeting.



3 Research the person you need to call. This is especially important if you don't know the caller personally. Find out what you can about them from colleagues, internet searches, social media profiles, etc.[4]

- If you know a bit about the person's background, you can use this knowledge for chit-chatting at the start of the call. Try saying something like, "So you worked previously with Lanham Industries, right? You must know Drew, then, right?"
- Researching the caller also helps you avoid faux pas. For example, if you find out the person has ties to one of your competitors, you'd make sure not to criticize that competitor.



1 Start with some banter, but don't overdo it. Call the number, and expect it to ring a few times before the person picks up. Say "hello," and introduce yourself and where you're calling from. It's polite to start with a bit of chit-chat, especially if you know the person, but don't ramble on. Keep it to just a minute or so.^[5]

- If you know the person, you could start with something like: "So Alyssa, last time we talked you were working on that expansion project. How's that going?"
- If you don't know the person, just stick to something simple like "I hope you're doing well today."



2 Avoid wishy-washy language. Asking things like “Is this a good time to call?” or saying things like “I’m just calling to...” makes it sound like there isn’t a clear, important purpose to your call. Keep the notes on the purpose of your call in front of you, and be confident that you have a legitimate reason for calling.^[6]

- If it really isn’t a good time to talk, the person will let you know anyway.



3 Get down to the business of your call. After introductions and banter, shift to the real purpose of your call. Just don’t make the transition too abrupt or obvious. Try making a segue to the purpose of your call, like:^[7]

- “Well it’s great to catch up Antonio. I’m calling to...”
- “I’m glad to hear that you’re doing well. I’m calling to...”



4 Make sure to ask questions. If you just bombard the person with information, it will feel like the call is overwhelming and one-sided. Instead, stop and ask questions now and then to make the person feel included and to establish a connection. For instance, try things like:^[8]

- "We're thinking of scheduling a group meeting on the 28th. How does that sound to you, Beatrice?"
- We're hoping to get all of the branch department heads together to discuss strategy for the next quarter. Do you have any ideas for that, Beatrice?"



5 Take notes during the call. Jotting things down as you talk to the person has several benefits. It can help you listen attentively to anything the caller says, for instance. It also serves as a record of the call, in case you need to take any follow-up action or report on the call to someone else.



6 Clarify any follow-up actions that are necessary. If you need to find out any information and get back to the person, make a note of this. Likewise, if you need the person to do anything and get back to you later, make sure they understand this. Either way, make sure to mention this clearly before you end the call. For example, you might say:

- "So Karl, I'll check with our suppliers about a timeframe for delivery, and get back to you on that, ok?"
- "Ok, Justina, if you can check your schedule and get back to me with some potential meeting times by the end of the week, that would be great, ok?"



- 1 Speak clearly and smile as you do.** It's easy to feel anxious when you have to make an important call. But if you talk too fast or mumble, the call will not be successful. Make sure to breathe naturally while you talk. Smiling as you speak will also help you sound more natural, even if the person can't see you.^[9]



2 **Ask the person before transferring a call or putting them on hold.** If you have to do either of these things, ask them if it is ok first. Don't assume that they want to be transferred, or have time to hold.^[10]

- Try saying something like "Liam, is it alright if I put you on hold for a moment while I check with Christine about that?"
- If you do have to put someone on hold, actually use the phone's "hold" feature. Never just leave the line open.
- Check back periodically with the person if it's going to be a long hold.
- Thank them for waiting when you pick up the phone again.



3 Tell the person you will look into anything you aren't sure about. You may come to a point where the person asks about something you don't know the answer to. If this happens, don't freak out. However, don't simply say "I don't know," since that is a dead end. Instead, tell the person something like "I don't have the answer to that right now, but I'll check on it and get back to you."^[11]

- If you promise to return a call, keep the promise.



4 End by thanking the person for their call. It's just courteous to thank the person for taking the time to talk to you. Make sure to end with something like "Thanks so much for talking with me. Have a great day!" People will remember these little gestures.^[12]



Community Q&A

Question

How do I keep a meeting on track?



Michael McCutcheon, Ph.D.
Career Coach & Psychologist
Expert Answer

I highly recommend making a meeting agenda and emailing it out to participants before the meeting. Outlining a clear schedule is a fantastic way to set expectations about how long you intend to spend on each topic.

Helpful 0 Not Helpful 0

Question

How should I answer a call?



Community Answer

To answer a call, you can just say something like, "Good morning/afternoon, this is _____" and give them your name.

Helpful 34 Not Helpful 4

Question

What do I do if the person did not answer the call?



Community Answer

Leave a message with your name, the purpose of your call, and a callback number where the person can reach you at their earliest convenience. If you cannot leave a message, then just try calling back later.

Helpful 16 Not Helpful 8



Tips

- If you have to leave a message, make sure to provide your name (spelling it if necessary), along with your contact information.
- Always remember to thank the person on the other line. It shows respect.

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About This Article



Co-authored by:
Michael McCutcheon, Ph.D
Career Coach & Psychologist

This article was co-authored by Michael McCutcheon, Ph.D. Dr. Michael McCutcheon is a career coach, psychologist, and award-winning public speaker who specializes in procrastination elimination, goal achievement, and increasing life satisfaction. With a background as a counseling psychologist, he guides clients toward becoming more aware of their desires and anxieties to break old patterns, create new habits, and achieve life-changing results. He also helps clients improve organization skills, embark on a new career, get promoted, get admitted into graduate schools, and transition from school to the working world. He is a published author and lecturer in graduate psychology courses at New York University (NYU), a position he has twice won the Teaching Award (2014 & 2019). His work has appeared in the press as a lifestyle and career expert for The Washington Post/The Associated Press, The New York Post, Scholastic, Lifehacker, and The Coca-Cola Company. He has served as a contributing writer for Out Magazine and featured panelist on National Public Radio (NPR). This article has been viewed 173,116 times.

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