

SAMPLE

TELEPHONE PROTOCOL

- Establish a set phone answering order; e.g., if receptionist is busy, the phone will ring at secretary A's station, who will pick up after a set number of rings (three or four).
- Inform your support staff exactly how you want the telephone answered. Example: "Good morning, [firm name]. How may I direct your call?" or "How may I assist you? And who may I say is calling?" Avoid asking the person's name and then telling them whether or not the attorney is available. This procedure may make a client feel his or her call is less important than another person's. Always thank clients for calling!
- If an attorney is unavailable, a message should be recorded on a duplicate message pad. Messages should always be put in the same place to be picked up by the attorney upon his or her return.
- Who talks to clients and what is said when an attorney is gone should be spelled out to support staff. Staff should be cautioned not to give legal advice when talking to clients.
- Perhaps all calls are referred to the absent attorney's secretary, or perhaps the receptionist fields all calls. Whoever talks to your clients, remember to instruct him or her to say: "Attorney X is unavailable at this time. I anticipate his/her return later today. When is an acceptable time to return your call and at what telephone number can you be reached?" Such a response sounds much better than: "Attorney X is out this afternoon. Can I have him call you?" (Caution again: Staff should never reveal to a caller anything about the identity of a client or the nature of a case the attorney is working on.)
- All calls should be returned by the end of the business day, if possible, and at the latest, within 24 hours. If an attorney is not able to return the calls, support staff may do so, simply explaining the nature of the delay and determining if an emergency exists. The duplicate pad comes in handy for this. Without revealing the name of the client or the nature of the case, a staff member may say: "Attorney X is still unavailable, but anticipates returning your call tomorrow. Is this something that will require a call before that time?"
- Be careful where the phone answerer sits. Be sure clients waiting in the reception area cannot hear phone calls being announced.
- Have a procedure for taking true emergency calls. You may wish to suggest that your secretary discretely knock on your door and place a note in front of you where no one else can see it.
- Unless you are following emergency procedures, NEVER take a call from another client while you are in conference with a client. Even excusing yourself to do so will make them wonder why another client is more important than they are when they are sitting right there.
- You should not discuss confidential client information over a cellular or cordless telephone without client consent.