



# CVUSD







CONEJO VALLEY UNIFIED SCHOOL DISTRICT

## CVUSD's Guide to Delivering Professional, Personal Service








*Treat students, parents, community members, and co-workers with courtesy, professionalism, and respect.*

### The Basics

*An individual walks into your office:*

-  Greet the individual with a smile, make eye contact, and have a positive attitude.
  - Personal discussions should stop when an individual arrives.
-  Acknowledge the individual immediately.
  - If you are with another person, indicate to the individual that you will provide assistance as soon as possible.
-  Provide translator/language assistance.
  - If the individual does not speak English, utilize all available resources to provide assistance.
-  Address the individual respectfully.
  - Whenever possible, address the person by name, or use "Mr., Sir, Mrs., Miss, Ms., or Ma'am as appropriate.
-  Listen carefully.
  - Be prepared with accurate and current information. Explain terms or words that may be only familiar to school personnel. Try to avoid using acronyms.
  - Tell them what you CAN do, not what you CAN'T DO
-  Ensure confidentiality.
  - Information about students, parents and colleagues should not be discussed openly.

### Dealing with Angry Individuals

-  Allow the individual to vent and do not interrupt.
-  Don't take it personally.
-  Refrain from negative judgements.
  - Labels interfere with our ability to help.
-  Be empathetic.
  - Appreciate and understand their feelings. Use a phrase such as "I can see why you feel that way."
  - Don't be afraid to say, "I apologize."
-  Ask questions and make statements to help clarify the cause of the individual's concern.
  - "What you are saying is..."
-  Inform the individual of the steps you will take to provide assistance.
  - Be honest and realistic in what you can provide.
-  Follow-up and follow through.
  - When possible, check back with the individual by telephone or e-mail to make sure that their concern was resolved.

## Answering the Phone

- 🌳 Put a smile on your face - it is reflected in your voice.
- 🌳 Answer the phone before the third ring.
- 🌳 Speak clearly.
- 🌳 Greet the caller as follows:  
“Good Morning! *School or Department Name* - this is *your name*. How may I help you?”
- 🌳 Use the caller’s name throughout the conversation.

## Placing a Caller on Hold

- 🌳 Ask for the caller’s permission to be placed on hold, and wait for a response.
- 🌳 Tell the caller why he/she is being placed on hold, and the approximate wait time.
- 🌳 After returning to the line, thank the caller for holding.

## Transferring a Call

- 🌳 Explain why the call should be transferred.
- 🌳 Ask the caller if he/she would like to be transferred, or if he/she prefers to leave a message.
- 🌳 Provide the caller with the name and phone number of the person to whom he/she is being transferred.
- 🌳 Stay on the line with the caller until the call is answered.
- 🌳 Tell the person to whom you are transferring the call, the caller’s name, and the purpose of the call.
- 🌳 Complete the transfer.

## Taking a Message

- 🌳 Explain where your co-worker is in a professional manner.
  - Do not provide personal details. Example: ***Do not*** tell the caller the person is on break. Say, “Jo is out of the office today.” or “Jo stepped away from her desk.”
- 🌳 Inform the caller of the availability of the person **BEFORE** asking the caller’s name.
- 🌳 Give an estimated time of your co-worker’s return.
- 🌳 Offer to help the person yourself.
- 🌳 Write down all pertinent information, attach any files that may be needed, and deliver the message to your co-worker.

*Our parents and students are not an interruption of our work, they are the purpose of our work.*