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.*