

# Timesaving Telephone Techniques

by Margaret Spencer Dixon, Esq.

From a time management perspective, the telephone can be our best friend or our worst enemy. How can you make sure that the phone (and its attendant technology) remains your servant instead of becoming your master? Here are a variety of techniques to help you stay in control of your time.

## Some General Techniques

- ◆ **Set up a foolproof system to handle incoming messages.** If you use voicemail, use a notebook or a section of your day planner to write down messages as you listen to them. Highlight follow-up tasks, and either do them immediately, or transfer them to your to-do list. If your office uses the “pink slip” system, make sure that everyone taking messages for you knows what information to get – name, affiliation, reason for the call, telephone number(s), and the best time to return the call – and precisely where to put the message slip. Check that location at regular intervals throughout the day as well as each time you return to the office. The best location is just outside your office door, so you won't be distracted by incoming slips yet can conveniently pick up your messages.
- ◆ **Develop your own written call-return policy.** One of the perennial complaints about lawyers is that they don't return calls. We're usually so busy that we tend to forget just how crucial this aspect of our profession is. One way to remind yourself of this is to write down your intended call-return policy, and then post it where you will see it frequently. Some sample policies are:
  - ▶ *All calls returned within 24 hours.*
  - ▶ *All calls returned the day they are received.*
  - ▶ *All client calls returned within four hours; all others, within 24 hours.*

Choose a policy that is consistent with the type of professional reputation you want to maintain.

## Dealing with Incoming Calls

- ◆ **Reduce incoming calls by setting up a system for keeping your clients informed about their cases.** This system could include a schedule of regular reports – written, telephonic, or both, depending on the situation and personalities involved. Send the client copies of all documents. When you are proactive about keeping your clients informed, they won't need to call you as often.
- ◆ **Schedule regular “quiet time” to work on high-concentration tasks.** For no more than one or two hours a day, have your incoming calls screened by your secretary or voicemail. You can accomplish a lot in a relatively short time when you focus your attention entirely on one project.
- ◆ **When your secretary screens your calls, be sure to provide all the information needed to do the job.** This information includes the location where you are, the day or time you will be able to return calls, and the names of VIPs whose calls you will take if you are at all reachable. If your firm is large, don't assume your secretary knows who all the players are. A friend of mine once confided to me with horror the time his secretary said to him, as an afterthought, “Oh, by the way, a ‘Mr. Knight’ called earlier.” She didn't know that ‘Mr. Knight’ (not his real name) was the firm's managing partner and most powerful rainmaker.
- ◆ **Decide in advance how much time to spend on routine, non-client calls.** Keep a timer by your phone and start it when you begin a call. Once the allotted time is up, conclude the call gracefully by saying something like, “Well, I'm sure you're busy, so I'll let you get back to work now.” Observe your own conversational habits to make sure you're not the one saying, “Just one more thing....” Let the other person have the last word.

## Dealing with Outgoing Calls

- ◆ **Plan your calls in writing.** List all the points you want to cover during the phone call. For people you speak with frequently, keep their names on pages in your day planner. As you think of things you want to

tell someone, jot them down, and then discuss them all at once the next time you speak with that person, instead of picking up the phone each time something occurs to you.

- ◆ **Batch your calls.** Make all non-crucial calls one after the other during regular call-back periods. You'll have an incentive to keep calls as brief as possible when you know you have five or six to get through. Try scheduling your call-back periods at some point during the first two hours of the morning or the last two hours of the afternoon, when it's easier to reach most people. (From Robert Moskowitz, *How to Organize Your Work and Your Life* (Garden City, N.Y.: Doubleday, 1981).)
- ◆ **Make only necessary calls.** Use alternative methods of communication such as email or fax for transmitting routine, non-confidential information.
- ◆ **Minimize telephone tag.** Ask people you phone regularly the best time to reach them and record that information in your phone directly. Give others the same information about you. Make sure your outgoing voicemail greeting includes the best time to reach you and asks callers to leave the same information about themselves. Also, to prevent or end a rousing game of phone tag, arrange for a specific time to have the conversation. Volunteer to initiate the call, thus avoiding wasting precious minutes as you both sit by your phones, wondering which one of you is to place the call. For important calls, fax or email your agenda in advance.

### Knowing the Value of Voice Mail

- ◆ **Learn how to use your office's voicemail system.** Most systems have many timesaving features, but we're often too busy to learn how to use them. Keep a diagram or "cheat-sheet" to remind you how to perform the various functions.
- ◆ **Send time-delayed reminders to yourself.** Most systems allow you to delay the delivery of voicemail messages for up to one year. Send messages to your own voice mailbox to give yourself an extra reminder of impending deadlines, meetings, and things to do.

- ◆ **Keep your outgoing voicemail message updated.** Whenever you will be away from the office for more than a day, record a new voicemail greeting such as, "This is Laura Lawyer on Tuesday, May 12. I'll be out of the office all day today (or, until X o'clock), but I'll be checking my messages frequently and will return your call as soon as possible." Be sure to leave yourself a time-delayed reminder to update your greeting once you return.
- ◆ **Take care of business entirely by voicemail whenever possible.** Most systems allow you to send voicemail messages directly to a voice mailbox without calling the person's extension. When dealing with colleagues on routine matters, make sure your message includes all the necessary details.
- ◆ **Delegate tasks by forwarding voicemail messages to your secretary's voice mailbox.** Most systems allow you to attach your own message to a forwarded message, so you can give specific directions about how to handle routine items or to transcribe long or important messages.
- ◆ **Use voicemail to send the same message to your entire work team.** Most systems allow you to set up mailing lists so that you can send one message to multiple mailboxes simultaneously. Have a mailing list set up for each of your work teams or projects so you can make announcements and update information efficiently.
- ◆ **When you're away from the office, leave messages for yourself.** If you are out of the office and think of something you need to do once you return, call your extension and leave a voicemail message for yourself. Or when you're at work, call your home answering machine to remind yourself of an early morning meeting the next day. Follow up the meeting reminder with a note on your bathroom mirror, and you'll have no excuse for forgetting that meeting.

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