

3.3.7: Stages of a Telephone Call

Learning Objectives

- Identify the five stages of a telephone conversation

Setting aside for the moment large dial-in experiences such as presentations or meetings in which just a few people will be doing all the talking, there are five stages to one-on-one and small-group business conversations via audio:

1. Openings and Greetings
2. Establishing Expectations
3. Content, Conversation, Business
4. Wrap-up, Next Steps, and Feedback
5. Closing

If you're talking to just one or two people, calls can be pretty spontaneous. If you are talking to a larger group, these five stages assume that you have sent an invitation with some detail about the purpose, length, and expectations of the call.

Openings and Greetings

In a one-on-one call, you can simply exchange greetings as you would with a friend.

DAVE: (answering phone): David Jeffries.

LANIE: Hi Dave, it's Lanie. How are you this morning?

DAVE: Hi Lanie, I'm fine, how are you?

LANIE: Great, thanks.

In a group call, the call host generally establishes who's on the line and greets each person as they dial in. If the call is unusually large, the host might do a roll call to be sure everyone has dialed in.

CHARISSE (the host of the call): Hi everyone. Thanks for calling in. I know we have Lori, Sophia, Charles, and Rudi on the line. How are you all doing?

GROUP: Fine, great, still sleepy, etc.

CHARISSE: Are Michael and Ginger on the call yet?

MICHAEL: I'm here.

GINGER: Yes, sorry I'm a bit late.

CHARISSE: Great! Let's get started.

Establishing Expectations

Sometimes, this is called the "feedforward" section. In this part of the call, you establish two key points: the timing of the call and the topics to be covered. It sounds simple, but it's easy to forget, and it can lead to frustration if expectations are different among the people on the call.

In one-on-one situations, this is really all you need to do:

LANIE: Do you have fifteen minutes or so to talk about the last batch of job applications we received?

DAVE: Sure. I have another call at ten o'clock, but I'm all yours until then.

In a larger group setting, you should also address how elements of the call—such as questions and answers—will be handled.

CHARISSE: This call is scheduled to last until 11:00. What I'd like to do is to let Lori and Michael tell us what they learned at their store visits. Michael will go first and tell us what he learned about merchandising and then Lori will discuss operations. I'd like to save Q&A for the end so that both of them can get through everything they have to say.

Content, Conversation, Business

In this part of the call, the work gets done. This is the part of the call people prepare for, but it goes much more smoothly if you remember to include what comes before and what comes after.

Wrap-up, Next Steps, and Feedback

Once the business has been conducted, the final task is to recap the conversation and set next steps, if there are any. This is pretty much the same for both one-on-one and group conversations. In a group call, it's especially important for the call leader to make sure she's left time for this stage. It shouldn't be rushed or feel like an afterthought.

LANIE: This has been really helpful, Dave, thanks. So you will review and sort the applications for assistant manager, and I'll go over the ones for stockroom staff, right? Then we can talk again on Friday about which ones to interview.

DAVE: Sounds good. If anymore assistant manager applications come in, just email them to me, okay? Oh, and I have a dentist appointment on Friday afternoon, but I can talk any time before 3:00.

LANIE: Great, I'll send you a meeting invite through Outlook.

Closing

This is where you say good-bye and thank you just as you would in a personal conversation.

DAVE: Thanks for taking the initiative on this call. I'll talk to you soon!

LANIE: Have a great day, Dave. Bye!

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