

Getting ready to phone a business

☐ 1. Decide what you need

Write one sentence beginning: I'm calling because... Then note what you would like to happen, such as getting an answer, changing an appointment or checking an order.

☐ 2. Find the number and a time to call

Use the business's official website or a document you trust. Check opening hours and any call charges. Choose a time when you have a little space, and charge your phone if needed.

☐ 3. Gather the relevant documents

Have the letter, bill, order confirmation, appointment details or previous correspondence beside you. You only need the documents that relate to this call.

Prepare what to say

☐ 4. Keep useful details at hand

Note your customer, order or reference number, relevant dates and the name or address linked to the enquiry. If calling for someone else, check whether their permission or presence is needed. Keep passwords, PINs and security codes off this worksheet.

☐ 5. Write the main facts and questions

Briefly note what happened, when it happened and what you have already tried. List your questions with the most important first. Leave space for the answers.

☐ 6. Prepare your opening words

Try: Hello, I'm calling about an order that hasn't arrived. I have my order number here. Could you help me check what happens next? Adapt this to your own task; you can read from your notes.

During and after your call

☐ 7. Make the call and take your time

Keep a pen and your notes nearby. Ask for the person's name or team and write down the answers. You can ask them to repeat something, explain it differently or pause while you write. If you reach the wrong team, ask who can help.

☐ 8. Confirm what happens next

Before ending, repeat back what was agreed. Check who will do what, by when, and how you should follow up. Ask for a reference number or written confirmation where useful. If nothing is resolved, note the next contact or step.

☐ 9. Keep your notes and set a reminder

Write down the call date, who you spoke to and the outcome. Keep the notes with the relevant documents somewhere private. Add a reminder for any action or follow-up. If nobody answered, note when you will try again.

What to have beside you

Keep the relevant documents open or beside you. Requirements vary between businesses.

Phoning your bank

Have your account reference and a recent statement or transaction list to hand. If they ask about your last transaction, you can check the date, amount and who it was paid to or received from. If your call concerns a particular payment, find that entry before calling.

Asking about an invoice or bill

Have the invoice itself and your customer or account number ready. They may need both the account number and the invoice number: one identifies you, the other identifies the particular bill. Check the invoice date, amount and due date. If you have paid, have the payment date, amount and reference to hand.

What to have beside you

Checking an order or delivery

Find the order confirmation, order number, date ordered and delivery address. If available, keep the tracking number and any messages about delivery or returns beside you.

Discussing an appointment or booking

Have the confirmation, booking reference, name used and appointment date and time ready. If you want to change it, note a few alternative dates that would suit you.

Only gather what relates to your call. Keep documents private and leave passwords, PINs and security codes off this worksheet. If a detail is missing, say so and ask what other information they can use.

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Before you call

Write only what you need. Keep this sheet private. Do not write passwords, PINs or security codes here.

Business / department / phone number

Where I found the number / opening hours / planned call time

Why I am calling / What I would like to happen

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My details and questions

Useful references, names and dates

Documents beside me / What happened / What I have already tried

My questions, most important first

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My call notes

Take your time. Ask the person to repeat or explain anything you are unsure about.

Call date and time / Person or team / Call reference

Answers and what was agreed

Next actions: who will do what, by when?

Follow-up and useful phrases

Follow-up date / Who to contact / Where I kept my documents

Words you can borrow

Could you explain that another way?

Please give me a moment to write that down.

Could you repeat the date or reference number?

Let me check I have understood: the next step is...

Who should I contact if I haven't heard by then?