

Behavior Standards Sample

Client Relations

- ✓ I will treat our clients in a kind and professional manner.
- ✓ I will maintain eye contact with the client.
- ✓ I will be courteous and friendly in speaking and in “body language.”
- ✓ I will introduce myself to the client and tell him my job title and experience.
- ✓ I will ask an open-ended question, such as, “How may I be of help to you?”
- ✓ I will use the person’s name as soon as I have heard it or as it is written.
- ✓ I will keep the client’s account confidential. I won’t discuss the account in public places, such as elevators.

Customer Service

- ✓ I will commit to excellent service and ask customers to tell me if I am not meeting their expectations.
- ✓ I will treat everyone in a courteous manner; rudeness is never acceptable.
- ✓ I will take action when I recognize that the customer’s expectations have not been met.
- ✓ I will remember customers are not an interruption of my work; they are the reason I am here.
- ✓ I will find someone else to meet a request if I am unable to do so.
- ✓ I will introduce other staff to customers when a hand-off occurs and explain that the person will provide excellence service.
- ✓ I will always strive to meet a customer’s needs by using HEAL:
 - H:** Hear them out
 - E:** Empathize
 - A:** Apologize (“I’m sorry we did not meet your expectations.”)
 - L:** Leap into action to solve the problem.

General Etiquette

- ✓ I will notice if someone appears in need of assistance and offer help immediately.
- ✓ I will not discuss staffing or internal issues with, or in the presence of, clients or visitors.
- ✓ I will speak with appropriate voice level.

Commitment to Coworkers

- ✓ In verbal and non-verbal communication, I will treat coworkers respectfully and professionally by listening and avoiding defensiveness.
- ✓ I will respond promptly to any form of communication.
- ✓ I will report to work as scheduled. I will communicate delays as appropriate.
- ✓ I will offer to assist coworkers and other departments when needed.
- ✓ I will respectfully approach fellow employees and refrain from discipline or constructive criticism in public.
- ✓ I will discuss issues directly with coworkers and not go to other people unless the issue cannot be resolved.
- ✓ I will take responsibility for solving problems regardless of origin.
- ✓ I will provide coworkers with a mini report for continuity of workflow when I am planning to be out of the office.

- ✓ I will be mindful and respectful of others' time and schedules. Meetings will start and end on time.
- ✓ I will be accountable when completing assignments.
- ✓ I will respect deadlines.

Telephone Etiquette

- ✓ I will be courteous on the telephone.
- ✓ I will make every effort to answer calls within three rings.
- ✓ I will introduce myself and my role.
- ✓ I will screen calls with the phrase, "May I say who's calling?"
- ✓ I will use the caller's name if I know it.
- ✓ I will use a tone of voice that is alert, pleasant, distinct, and expressive.
- ✓ I will not eat, drink, chew gum, or smoke while talking on the telephone.
- ✓ I will avoid phrases like "OK," "Yeah," "Hold on," "Honey," and "See ya."
- ✓ I will answer the telephone with a greeting, my department, and my name (and title if appropriate).
- ✓ I will ask for permission before placing a caller on hold or using a speakerphone, and wait for an answer. I will thank the caller when I return to him or her.
- ✓ I will acknowledge customers placed on hold every 30 seconds.
- ✓ I will give the caller the extension number of the person he or she is being transferred to.
- ✓ I will be knowledgeable in the use of facility phones and their features.
- ✓ I will smile when speaking on the phone to convey a pleasant tone of voice.
- ✓ I will have a voice mail message that is brief, current, includes my name and department, and offers the caller options if possible.
- ✓ I will make every effort to answer my phone during normal business hours.
- ✓ I will return voice mail messages within 24 hours or the next business day.
- ✓ I will offer further assistance to the caller upon completing the conversation.
- ✓ I will provide an option to bypass or speak to an attendant when phone trees are used.

E-mail Etiquette

- ✓ I will use my e-mail for business only.
- ✓ I will use my e-mail tool options appropriately when I am going to be away for a period of time.
- ✓ I will be aware of potential computer viruses. I will open e-mail from outside the facility only if I know the sender.

My signature below indicates that I have been given a copy of the Behavior Standards. I will try to uphold these standards to the best of my ability.

Name: _____

Date: _____

One copy to employee. Second copy signed and filed with HR.