

SCORE Desk Duty Procedures

I. Introduction

Purpose

The purpose of this document is to give SCORE counselors quick and easy access to procedures for:

- Handling calls
- Reviewing the schedule
- Answering the questions callers most often ask.

If you are a new SCORE member, training and guidance from more experienced counselors will complete the procedures in this book.

Acknowledgments

Thank you to Len Willner and [REDACTED] for taking time to clarify and redefine procedures, questions, and answers for this manual.

Thank you also to [REDACTED] for suggesting this consultation within SCORE.

II. Handling Calls

A. Answer the phone with this greeting:

This is SCORE, the Service Corps of Retired Executives.
This is (*your name*) speaking. How may I help you?

B. Take messages from Fax machine, telephone answering machine, and telephone as follows.

- a. Print each message on a telephone answering form.
- b. Print the time and date of the message on the form.
- c. Print your name on the line at the bottom of the form.
- d. **IMPORTANT:** Your name and all information must be clear and legible. We must be able to read your name in case we need further clarification and for record keeping on client contacts.

C. Return calls from Fax and telephone answering machines.

D. Return calls from your own message folder.

E. Always record on the message form the details of the conversation and the information in B above.

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F. Handling Requests

If the Caller:	Then:
Wants to talk to another Counselor or SCORE Officer	<ol style="list-style-type: none"> 1. Print the message on the message form, as above. 2. Place the message in the folder of the appropriate Counselor or Officer.
Requests information on services	<ol style="list-style-type: none"> 1. Return the caller's call. 2. Answer questions about SCORE (See Tab 4). 3. Ask the person to come in for an appointment with a counselor (See G. Setting Appointments below).
Requests information on SCORE membership	<ol style="list-style-type: none"> 1. Complete the "Request for Membership" application form. 2. Place the completed form in the folder for the Membership Committee Chairperson.

G. Setting Appointments for Counseling

If the Caller Wants Counseling AND:	Then:
Agrees to an appointment	<ol style="list-style-type: none"> 1. Set appointment for no later than 3:00 p.m. 2. Log the appointment in the appointment book.
Cannot visit the SCORE office	<ol style="list-style-type: none"> 1. Tell the caller you need a completed 641 form so that the counseling can be arranged. 2. Ask the caller for his or her address. 3. Print the address on the message pad. 4. Thank the caller for his or her interest. 5. Tell the caller that a counselor will call for an appointment within two weeks in our office or in their place of business. 6. Mail the caller a form 641.

III. Reviewing the Schedule

- a. Check the Schedule for who is on duty the next day.
- b. Call all Counselors who are on duty the next day to remind them of their schedule.
- c. Review Appointment Book to see if any appointments are scheduled during your duty.
- d. If appointments are scheduled during your duty, prepare for these counseling sessions.

IMPORTANT: If you cannot fulfill your schedule, you must find a replacement.

IV. Questions & Answers

NOTE: Take a detailed message on the message pad for all calls for our records. For more information on handling calls, see Tab 2.

1. *Tell me about your services. Who are you?*

We are: '

- a Small Business Administration sponsored organization
- consisting of retired senior executives
- who volunteer to help people starting a business
- or who are already in business.

Our services are:

- confidential and
- free of charge.

2. *I'm starting a business and need to talk to a counselor.*

a. Ask questions and record answers on a message form.

- 1) What type of business are you starting?
- 2) How far along are you?
- 3) Set up an appointment for counseling before 3:00 p.m. weekdays.
- 4) Do you have a business plan?
 - If yes, tell caller to bring it to the appointment.
 - If no, tell caller that SCORE can help develop a business plan.
- 5) Say: Bring whatever ideas and documentation you have to your appointment.
- 6) Thank the individual for calling and end call.

b. Follow up after the call.

- 1) Look up counselors in the Simplified Data Management data base or on the SCORE roster.
- 2) Find someone who has the needed expertise.
- 3) If you cannot find a match, schedule with someone else.

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3. *I'm in business and I have this problem (describes problem). I'd like to speak with someone who has this specialty.*

- a. Tell the individual you will arrange for a SCORE counselor to call back.
- b. Thank the caller and end the call.
- c. Find a counselor whose skills match by searching the Simplified Data Management system or the SCORE Chapter 412 Membership Roster.
- d. Choose an appropriate counselor.
- e. Ask that counselor to call the individual and set an appointment.
- f. If no one has this specialty, then arrange for someone to call and set an appointment.

4. *I need money for a project. or*

I've been turned down by two banks for a loan. How do I get a loan from you?

- a. Set up an appointment before 3:00 p.m. weekdays to discuss funding options.
- b. Ask: Do you have a business plan?
 - If yes, tell the caller to bring it to the appointment.
 - If no, tell the caller that SCORE can help you develop a business plan.
- c. Ask: Is this a new or existing business?
 - If new, thank the individual for calling and end the call.
 - If existing, Ask: Do you have a financial plan?
 - If yes, tell caller to bring it to appointment.
 - If no, tell caller that SCORE can help you develop a financial plan.
 - Thank the individual for calling and end the call.

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5. *I was counseled by someone six months ago. I want to talk to him/her, but I don't know his/her name.*
- a. Take down the name and phone number of the caller.
 - b. Tell him/her a counselor will call back shortly.
 - c. Go into the Simplified Data Management data base on the computer.
 - d. Search for the client's name and find the counselor with whom the person was working.
 - e. Call the counselor and have him/her call the client for an appointment.
- **If you cannot get in touch with the counselor** (e.g., he/she left SCORE or is on vacation), then:
- 1) Call the client back and tell him/her that you are arranging for another counselor to call back for an appointment.
 - 2) Get the client's case number from the Simplified Data Management data base.
 - 3) Look up the client's case file by number.
 - 4) Read the file.
 - 5) Select an appropriate counselor.
 - 6) Call the counselor and ask him/her to make an appointment with the client.
6. *I need to cancel an appointment, and I don't remember the counselor's name.*
- a. Go into the Simplified Data Management data base on computer.
 - b. Search for the client's name and find the counselor with whom the person was working.
 - c. Call the counselor and have him/her call the client for a new appointment.
7. *Where's the nearest SCORE chapter to me?*

Refer to the telephone list on the wall for S. Florida SCORE chapters.

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