

TOOL 08

Phone & Gatekeeping Scripts

Ten scripts for the calls that make new assistants nervous.

Inside

Phone basics · Ten scripts with what to say if they push

The message slip · The call log

Phone basics

Keep this page, and the next three, near your phone for your first months.

- ☐ Answer within three rings, with a pen and your notebook ready.
- ☐ Smile before you pick up. People can hear it.
- ☐ Repeat names and numbers back to the caller. Spell names if needed.
- ☐ Never say where your boss is or what they are doing. "Not available" is enough.
- ☐ Never promise a time your boss will call back. Promise that they will get the message.
- ☐ If you do not know, say you will find out, and give a time.
- ☐ Write every message on a message slip, even if you think you will remember it.

FROM 26 YEARS AT THE DESK

For my first months in every new job, I kept these scripts on a card under my keyboard. After a few weeks I did not need them, but knowing they were there meant I never froze on a call.

CALM MOMENT

Before a call you dread: one slow double breath, shoulders down, smile, then pick up.

What to say

Change the words so they sound like you. Keep the structure.

1 • Answering the phone

SAY THIS

Good morning, [boss's name]'s office, [your name] speaking. How may I help you?

2 • Your boss is not available

SAY THIS

[Boss's name] isn't available at the moment. May I take a message, or is there something I can help you with?

Take: name, organization, number, reason for the call, best time to reach them, and how urgent it is. Read it back before you hang up.

3 • Screening an unknown caller

SAY THIS

May I ask who's calling, and what it's regarding?

Thank you. Let me see if [boss's name] is available.

If they will not say: "I'm sorry, I can only pass on calls when I know what they're about. You're welcome to send an email to [address]."

4 • "It's urgent"

SAY THIS

I understand. So that I can pass it on correctly, could you tell me briefly what it's about? I'll make sure [boss's name] gets it as soon as possible.

Never promise a call back time. Pass genuinely urgent messages straight away, in the way your boss asked for (Boss Profile).

5 • Not available, but I can offer

SAY THIS

[Boss's name] isn't available then, but I can offer you Thursday at 2 p.m. or Friday at 10. Would either work?

Offer two options, never an open question. "When would suit you?" can take five emails. Two options take one.

6 • Putting a call through

SAY THIS

(To your boss) I have [name] from [organization] on the line about [topic]. Shall I put them through?

(To the caller) Thank you for waiting. I'm putting you through now.

7 • When you don't know the answer

SAY THIS

That's a good question. I don't want to give you the wrong information, so let me check and call you back by [time].

Then call back at that time, even if only to say you are still checking.

8 • Chasing by phone

SAY THIS

Hello, it's [name] from [boss's name]'s office. I'm calling about [item] that we were expecting on [date]. Is there anything you need from us to move it forward?

Friendly, short, with a clear next step. Note the new date in your follow-up tracker.

9 • Declining a meeting request

SAY THIS

Thank you for thinking of [boss's name]. Unfortunately [his/her/their] schedule doesn't allow it at the moment. Could [colleague] help, or shall I come back to you next month?

10 · An upset caller

SAY THIS

I'm sorry this has been frustrating. I'd like to make sure it reaches the right person, so let me write down the details.

Thank you. I'll pass this to [boss's name] today, and someone will be in touch.

Listen until they finish. Do not argue, defend or promise outcomes. Lower your voice slightly; people often match your tone. If the caller becomes abusive, you may politely end the call and tell your boss.

Message slips

Keep a stack by your phone.

Message

For _____

From _____

Organization _____

Phone _____

Date and time _____

Message _____

URGENT PLEASE CALL BACK

WILL CALL AGAIN FYI

Message

For _____

From _____

Organization _____

Phone _____

Date and time _____

Message _____

URGENT PLEASE CALL BACK

WILL CALL AGAIN FYI

Message

For _____

From _____

Organization _____

Phone _____

Date and time _____

Message _____

URGENT PLEASE CALL BACK

WILL CALL AGAIN FYI

Message

For _____

From _____

Organization _____

Phone _____

Date and time _____

Message _____

URGENT PLEASE CALL BACK

WILL CALL AGAIN FYI

KEEP A RECORD

Call log

Useful in your first weeks to learn who calls, how often, and about what.

[illegible]