



## Lesson Guide

Climbers learn about the importance of adapting their communication style across different workplace platforms, including phone calls and video calls. They explore best practices for maintaining professionalism, clarity, and appropriate tone in virtual and phone interactions. By the end of the lesson, Climbers will have practiced handling professional phone and video call scenarios, demonstrating active listening, clear communication, and professional etiquette.

<b>Learning Objectives</b>	<p><b>Practice</b> clear and professional communication in workplace scenarios.</p> <p><b>Apply</b> active listening skills to enhance understanding and engagement in phone and video calls.</p> <p><b>Adapt</b> tone and language to suit different professional communication contexts.</p>
<b>WIOA Program Elements</b>	<p><b>E4. Occupational Skills Training.</b> Focuses on technical skills necessary for workplace success.</p> <p><b>E5. Education Offered Concurrently with Workforce Preparation.</b> Integrates technical skills training with professional communication and presentation skills.</p>
<b>Key Concepts</b>	<p><b>Professional Communication:</b> The use of appropriate language, tone, and etiquette in workplace interactions.</p> <p><b>Active Listening:</b> Engaging with the speaker through verbal acknowledgments, paraphrasing, and clarifying questions.</p>
<b>Materials</b>	<p>Coach Deck: <a href="#">Digital Dialogue Lesson Deck</a></p> <p>Internet-ready devices with Hats &amp; Ladders access</p> <p><b>Activity:</b> <a href="#">Phone Call Scenarios</a></p> <p><b>Rubric:</b> <a href="#">Phone Call Scenarios</a></p>

## Coach Prep

1. Review lesson instructions and activity materials, including the **Coach Deck**, an optional resource to guide Climbers through the lesson, and digital Career Climb.
2. Arrange a computer lab or laptop cart, or instruct your group to bring their own devices with internet connectivity.
3. *Optional:* From the Coach platform, assign the **Digital Dialogue** Career Climb to your group. This will allow you to track their progress from your dashboard.

## Warm-Up

1. Introduce professional etiquette by explaining that communication styles can vary depending on the medium. Explain that through this lesson, climbers will explore how virtual communication and phone communication each have their own professional etiquette rules. Suggested prompts:
  - *When do you think a phone call is better than an email?*
  - *What are some things to keep in mind when using video calls for work?*
  - *Have you ever received an unprofessional work-related text or message? What made it feel that way?*
2. Have a few Climbers share their thoughts. This will help highlight the different ways people approach phone, video, and text conversations at work.
3. Explain that people interact across different platforms at work, and knowing how to adapt communication styles can help build stronger professional relationships. A phone call might be needed to handle an urgent issue, while a video call allows for more engagement. Texting or chatting at work can be helpful, but it needs to stay professional.
4. Briefly outline what will be covered in the lesson, including:
  - **The basics of virtual communication:** how to perfect your virtual presence on a phone or video call.
  - **Emphasis on phone etiquette:** best practices for making and receiving professional calls and using your cell phone at work.

## Guide a Career Climb

1. Explain that effective communication is an important workplace skill. Virtual, phone, and text-based communication require different strategies to maintain professionalism. Suggested prompts:

- *What are some common communication mistakes in a professional setting?*
- *What strategies can help ensure clear communication in digital formats?*
- 2. Frame key skills for professional phone and video conversations. Suggested prompts:
  - **Active Listening:** *Use verbal acknowledgments (“I understand”), paraphrase key points, and ask clarifying questions to ensure engagement and understanding.*
  - **Clarity & Professionalism:** *Speak clearly and concisely, confirm key details before ending the call, and maintain professionalism, even in challenging situations.*
  - **Appropriate Tone:** *Match your tone to the situation, sound engaged and approachable, and adjust your tone based on the conversation’s emotions.*
  - **Focused Communication:** *Minimize distractions, stay present, and ensure your message is clear and solution-oriented.*
- 3. Direct Climbers to the Hats & Ladders platform to complete the **Digital Dialogue** Career Climb, which consists of four Ladders:
  - **Digital Communication 101** (5 Mins)
  - **Perfecting Your Virtual Presence** (6 Mins)
  - **Phone Smarts at Work** (6 Mins)
  - **Digital Files: Sorted!** (7 Mins)
- 4. Climbers can complete the entire Career Climb **at once**, or they can **pause** to share out takeaways and questions along the way.
- 5. Climbers can then apply what they learned about professional communication to the **Phone Call Scenarios** activity.

### Activity: Phone Call Scenarios

1. Have Climbers independently read through the instructions on the **activity handout**.
2. Climbers apply what they’ve learned to respond to workplace writing scenarios.
3. After practicing, invite a few groups to perform a phone call scenario to demonstrate professional phone communication.
4. Facilitate a brief reflection where Climbers discuss their experiences and give each other constructive feedback. Suggested prompts:
  - *What did you find most challenging about the role-play?*
  - *How did you adjust your approach when switching between different types of communication?*
  - *What strategies helped you maintain professionalism in each scenario?*

## Wrap-Up

1. Reinforce that professional communication is a skill that improves with practice. Whether using phone calls, video calls, or text messages, being clear, polite, and professional strengthens workplace relationships.
2. By practicing these scenarios, Climbers have gained confidence in adapting their communication style to different workplace situations. Review key lesson concepts, including:
  - **Professional Communication:** The use of appropriate language, tone, and etiquette in workplace interactions.
  - **Active Listening:** Engaging with the speaker through verbal acknowledgments, paraphrasing, and clarifying questions.
  - **Clarity & Professionalism:** Speaking concisely, confirming key details, and maintaining professionalism in all workplace communications.
  - **Appropriate Tone:** Using a tone that matches the situation, conveys professionalism, and fosters positive interactions.
3. Final prompt:
  - *What is one strategy you'll use in your next professional phone call, video call, or text message?*

## Assessment

- To evaluate the **Climbers' understanding** of the lesson, use the provided **rubric** to score activity submissions on a scale of 1 to 4 for each criterion.

## Modifications

- If you do not have access to devices, have Climbers complete the digital Career Climb at home and discuss key takeaways in class.
- Need more scaffolding? Provide sentence starters or guided scripts for role-playing.
- Looking for an extension? Have Climbers record a short professional voicemail based on one of the scenarios for peer feedback.

## Activity: Phone Call Scenarios

Many jobs require skills in phone and video call etiquette. In this activity, you will practice handling various professional scenarios through phone calls, video calls, and cellphone use. You will work in pairs or groups to role-play each scenario, allowing you to practice clear communication, active listening, and maintaining professionalism.

**Step 1:** Review the scenario, your task, and key points to include. Then, think about how you will respond.

**Step 2:** With your partner, decide which role you will take and practice your responses using professional etiquette. Focus on clear, concise communication, active listening, and polite professionalism, while also considering the differences between the communication modes. The first scenario has a script to help you get the conversation started.

**Step 3:** Switch roles so everyone practices both sides of the communication (e.g., the caller and the recipient).

**Step 4:** Complete steps 1-3 for all three communication scenarios. For an added practice, complete the “Extra Challenge” portion of each scenario.

### Scenario 1: Scheduling an Important Meeting with a Senior Executive

#### Phone Call

- **Details:** You work as an assistant at a small company, and your supervisor has asked you to call a senior executive to schedule a meeting about an upcoming project. The executive has a busy schedule, and your supervisor needs to secure a time within the next two weeks. You must be polite, professional, and flexible in arranging the meeting, keeping in mind the executive’s availability.
- **Your Task:** Role-play a phone conversation where you contact the executive’s assistant to schedule the meeting. Be sure to offer a range of dates and times, and ask for confirmation once the meeting is set.
- **Key Points to Include:**
  - Politely introduce yourself and state the purpose of the call.
  - Offer multiple dates and times for the meeting.
  - Confirm the final meeting details and express gratitude for the executive’s time.

- **Get started with this script:**

- **Assistant:** Hello, this is [Your Name] from [Company Name]. I'm calling on behalf of [Supervisor's Name] to schedule a meeting with [Executive's Name] regarding an upcoming project. Do you have a moment to discuss availability?
- **Executive Assistant:** Hello, [Your Name]. Yes, I can check their schedule. Do you have any preferred dates and times?
- **Assistant:** [continue the conversation from here]

**Extra Challenge: Video Call**

- **Details:** After scheduling the meeting, your supervisor asks you to confirm the final details with the executive over a quick video call.
- **Task:** Role-play a short video call where you confirm the meeting time and agenda. Pay attention to eye contact, clear speech, and a professional tone.

**Scenario 2: Handling a Customer Complaint** **Phone Call**

- **Details:** You work as a customer service representative at a tech company. A customer has called in because the product they purchased isn't working properly. The customer is frustrated and wants an immediate solution. You need to remain calm and professional while addressing their concerns.
- **Your Task:** Role-play the phone conversation where you listen to the customer's complaint, apologize for the inconvenience, and offer a solution, such as troubleshooting steps or an exchange of the product.
- **Key Points to Include:**
  - Acknowledge the customer's frustration and apologize for the issue.
  - Offer troubleshooting advice or a product replacement.
  - Reassure the customer that their issue is a priority and will be resolved quickly.

**Extra Challenge: Texting at Work**

- **Details:** The customer follows up with an email asking for an update. Your supervisor

asks you to send a quick text message to let them know the status of their request.

- **Task:** Write a professional text response. Keep it polite, clear, and concise, avoiding abbreviations or casual language.

### Scenario 3: Confirming Details for a Business Trip

#### Phone Call

- **Details:** You work in the logistics department of a company, and your manager has asked you to call a travel agency to confirm the flight details and hotel arrangements for an upcoming business trip. You must double-check all details (dates, times, and locations) to avoid any issues during the trip.
- **Your Task:** Role-play a phone conversation with the travel agent. Confirm the flight departure time, hotel reservations, and any special arrangements your manager requested. Be sure to ask for an email confirmation of all the details.
- **Key Points to Include:**
  - Politely confirm all travel details, including dates, times, and hotel location.
  - Ask for email confirmation of the arrangements.
  - Express gratitude for the travel agent's assistance.

#### Extra Challenge: Texting at Work

- **Details:** After confirming the travel details, your manager asks for a quick text summary instead of a long email.
- **Task:** Write a professional text message summarizing the key travel details in a clear and concise manner. Avoid unnecessary abbreviations and keep the tone professional.

## Rubric: Phone Call Scenarios

Criteria	1: Needs Improvement	2: Developing	3: Proficient	4: Exemplary
<b>Clarity &amp; Professionalism</b>	Speech is unclear, lacks professionalism	Some unclear moments, minor professionalism lapses	Generally clear and professional	Very clear, professional, and confident
<b>Active Listening &amp; Engagement</b>	Does not acknowledge responses, interrupts	Minimal engagement, some interruptions	Listens attentively and responds appropriately	Fully engaged, asks thoughtful follow-up questions
<b>Adapting to the Scenario</b>	Struggles to adapt to role-play	Some adaptation, but lacks confidence	Adapts well to different roles and challenges	Fully adapts with confidence and professionalism
<b>Appropriate Use of Tone</b>	Incorrect format or informal tone	Some formatting/tone issues	Follows guidelines for professional tone	Demonstrates excellent use of tone and format