

# A Guide for Opening and Closing a Phone Interview

## Developing a Script for Phone Interviews

Across the nation, states have found that developing a script to guide staff in opening and closing a phone interview is a best practice for successful phone interviews. An opening and closing script helps to set the right tone for the interview and ensures that the worker provides and receives all the necessary information to determine eligibility and that clients understand the process, as well as what is expected from them.

Each county should develop a script that best meets their unique needs. This document offers suggestions on points to include in a phone interview script and should be paired with the other sample materials available on the [411 on Phone Interviews in California](#) website.

### PREPARING FOR THE INTERVIEW

Preparing for the interview can be just as important as the interview itself. Here are few tips to help you prepare for the interview:

- Make sure you have all the necessary documents for the current interview at your fingertips during the phone call.
- Make sure you have the computer application and relevant starting screen already open.
- Review any pertinent information before your client is on the phone so that you are familiar with their application.
- Before you begin, let your colleagues know that you will be conducting a phone interview so that you are not interrupted during the phone interview.

By having everything you need for the interview easily accessible to you, the process will run more smoothly and you can avoid delays while you are on the phone. For additional tips, please visit the 411 on Phone Interviews website: <http://www.cfpa.net/PhoneInterviewsCalifornia.html>.

### OPENING THE PHONE INTERVIEW

Having a prepared opening script will help you set a positive tone throughout the phone interview. Below are sample points that you may want to include in your opening script:

- **Introduce yourself**  
“Hello, my name’s \_\_\_\_\_ “
- **Verify that it’s the client to whom you’re speaking**  
“I’m calling for \_\_\_\_\_, is he/she available?”
- **Let the client know who’s calling, from where, and why**  
“My name is \_\_\_ and I’m calling from the office of \_\_\_ for your phone interview.”
- **Give an estimate of how long the interview will take**  
“The interview should last anywhere from 30 to 60 minutes, do you still have this amount of time available?”
- **Ask if the client has any questions before you begin**  
“Do you have any questions before we get started?”
- **Encourage clients to ask questions throughout the process**  
“If at any point you have questions or don’t understand something, please feel free to stop me and ask any questions before we continue”
- **Explain how the phone interview process works**  
“There are several parts to the interview. First, I will go over the information in your application. Then, I will \_\_\_\_\_, and \_\_\_\_\_, and finally, I’ll \_\_\_\_\_. I will let you know as we complete each section

### CONCLUDING THE PHONE INTERVIEW

In closing, take the time to answer questions, provide your contact information, and explain next steps. Below are sample points that you may want to include in your closing script:

- **Ask if there are any final questions**  
“We’re about to wrap up the interview. Do you have any questions?”
- **Provide your contact information**  
“If you can think of any other questions or need help with the materials I mail to you, please give me a call at \_\_\_\_\_.”
- **Explain the immediate next steps**  
“Again, I will mail you a list of the documents I need to complete your application. Please read this list and send me the documents. If you have any questions or need help finding those documents, please give me a call.”
- **Remind the client of the dues dates**  
“Remember, it’s important that you mail to me the documents within \_\_\_\_\_ days so your application is complete.”
- **Ask again if there are any questions**  
“Do you have any last questions?”
- **Say Thank You**  
“This wraps up our interview. I wanted to thank you for your time. Please be on the lookout for the list which should be arriving by mail shortly, and remember please give me a call if you have any questions.”

For additional information and resources on phone interviews, please contact Alexis Fernandez at [alexis@cfpa.net](mailto:alexis@cfpa.net) or visit our website at: <http://www.cfpa.net/PhoneInterviewsCalifornia.html>.