

Quick How-To: Walk Someone Through a Task Over the Phone

Who is this for?

This guide is for anyone trying to help someone complete a task by going through the steps over the phone.

Step-by-Step Instructions

Step 1: Speak Slowly and Be Patient

- Break each step into short, clear instructions.
- Remember to be patient. If things are rushed it may cause confusion.

Step 2: Ask What They See

- Ask what they see on their screen.
- Use their words to guide them from where they are.

Step 3: Use Numbers or Positions

- Say things like 'Tap the second icon from the left' or 'Scroll down halfway.'
- Be as specific as possible.

Step 4: Confirm Progress & Clear Up Confusion

- Ask them if they understand and are comfortable with continuing.
- If they are lost or confused let them know to take a couple minutes to catch up and to ask questions.

You Did It!

You helped a friend or family member complete a task over the phone.