

HOW TO BE AN OUTSTANDING RECEPTIONIST



INSTRUCTOR GUIDE
1-DAY COURSE

HRDQ[®]

How to be an Outstanding Receptionist

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Instructional design and learning philosophy

We are committed to providing the best core skills content possible for Instructor-Led Training (ILT). The following principles are applied in the development of programs:

Sound Instructional Design

All course content is developed using a variety of research techniques. These include:

- Brainstorming sessions with target audience
- Library research
- Online research
- Customer research (focus groups, surveys, etc.)
- Subject Matter Experts (SME)
- Interviews with trainers

Expert instructional designers create imaginative and innovative solutions for your training needs through the development of powerful instructional elements. These include:






- Learning objectives — effective tools for managing, monitoring and evaluating training
- Meaningfulness — connects the topic to the students' past, present and future
- Appropriate organization of essential ideas — helps students focus on what they need to know in order to learn
- Modeling techniques — demonstrate to students how to act and solve problems
- Active application — the cornerstone to learning — helps students immediately apply what they have learned to a real-life situation
- Consistency — creates consistent instructions and design to help students learn and retain new information
- Accelerated learning techniques — create interactive, hands-on involvement to accommodate different learning styles

Application of Adult Learning Styles

Adults learn best by incorporating their personal experiences with training and by applying what they learn to real-life situations. Our experienced instructional designers incorporate a variety of accelerated learning techniques, role-plays, simulations, discussions and lectures within each course. This ensures that the learning will appeal to all learning styles and will be retained.

Course timing

Module One: You are the Face of the Organization

Type of Activity	Segment	Time
	Qualities of a valuable receptionist	25
	First impressions and their importance	20
	Greeting visitors	10
	Dealing with special needs	10
	Handling security and emergency procedures	10



Reading



Written Exercise



Facilitate

Module Two: Delivering Exceptional Customer Service




Type of Activity	Time	
	Letting customers know you value and respect them	10
	Providing internal customer service	15
	Handling customer inquiries and complaints	15
	Remedies based on company policies	30



Group Activity

Course timing

Module Three: Communication Skills





Type of Activity	Segment	Time
	Listening skills	25
	Questioning techniques	20
	Dealing with upset people	20

Module Four: Telephone Skills

Type of Activity	Segment	Time
	Your vibrant voice	20
	Developing call management standards	20
	Answering the phone	10
	Screening callers	10
	Placing callers on hold	10
	Transferring calls	10

Course timing

Module Five: Managing Time Efficiently

Type of Activity	Segment	Time
	How to prioritize your work	10
	Developing support networks within and outside your organization	10
	Stress busters	15
	Creating databases	25

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Course objectives 

- Create a welcoming impression that matches your organization's image
- Be more helpful to visitors and colleagues
- Convey a confident and positive attitude in person and over the phone
- Handle angry or impatient people with diplomacy
- Screen callers without offending them
- Juggle multiple priorities efficiently

Course objectives

Successful completion of this course will increase your knowledge and ability to:

Envision the receptionist role in the organization

Create a welcoming impression that matches your organization's image

Be more helpful to visitors and colleagues

Convey a confident and positive attitude in person and over the phone

Handle angry or impatient people with diplomacy

Screen callers without offending them

Juggle multiple priorities efficiently

ModuleOne



YOU ARE THE FACE OF THE ORGANIZATION

You are the face of the organization

- Receptionists are the most visible employees
- Receptionists are the first to meet and greet customers or clients
- First impressions are lasting impressions
- Right or wrong we judge the new people we meet
- Customers judge the organization by the receptionist behaviors

Open the training with the idea that receptionists are among the most visible employees in the company.

Qualities of a valuable receptionist

Defining the qualities of a professional receptionist is sometimes similar to how a U.S. Supreme Court Justice once defined pornography: "I know it when I see it."

Customers and clients look to companies for products and services that make their lives easier. When a customer enters a place of business subconsciously assume the first person they encounter is obligated to solve their problems. Often the first person they see first is a receptionist. The customer may act as if a receptionist should know everything. It is not possible for a receptionist to know everything, but they can:

Diagnose problems
Create the next step

A good receptionist has a talent for adapting general knowledge of company business to solve a wide range of problems. One quality receptionists have is problem solving.

In reviewing qualities and careers, we see most careers require special qualifications. Careers such as carpentry emphasize physical abilities and a mechanical aptitude. A career as a receptionist requires an aptitude for internalizing the general knowledge of a company's business. General knowledge of your company's business means:

Awareness of customers' and clients' needs
Facts about customers expectations
A working knowledge of the products and services a company delivers
Knowledge of company policies relating to customers and employees
Telephone competency
Familiarity with the primary software used by the company
Knowledge of the organization's basic record keeping principles
A sense of the power distribution within the organization

Reviewing job description can aid in understanding an employer's expectations.

Activity

Recall the terms used in a receptionist job description. Spend some time brainstorming and writing down terms and phrases used to describe the responsibilities of a receptionist.

"Professional behavior" is often a quality that describes a good receptionist. Describe professional behavior.

A look at the information gathered in the activity reminds us that receptionists adopt the perspective of the many individuals with whom they interact.

Taking the point of view of another individual is a necessary asset for a receptionist.

For example, when answering the telephone, expectations and needs vary from caller to caller. Receptionists analyze the callers' needs and then place this information in the context of the organization's expectation.

Activity:

Time: 10 minutes:

Ask participants to create a job description for a receptionist. Get them to recall the expectations of the job. Write their ideas down on a flip chart. You want to make certain that someone comes up with the terms "professional demeanor, professional attitude, or professional behavior" before the brainstorm is over.

Examples of job descriptions include:

1. Individual to work at our front desk.
1. Perform various clerical duties as needed.
2. Possess, at minimum, a basic knowledge of computer applications such as MS Word and Outlook.
3. Someone who has the ability to handle multiple tasks.
4. Professional demeanor.
5. Works well independently.

Provides top-notch customer service to all inbound callers and guests.

Excellent customer skills and experience are essential to your success with the company.

Professional behavior.

Be at ease. The person who is at ease when dealing with internal or external customers is easier to approach, compared with a stiff, tense or aloof person.

Be discreet. The possession of knowledge is not a reason to impart it. Know when to say something and when not to.

Qualities of a valuable receptionist

- A talent for solving a wide range of company business problems
- An aptitude for internalizing the general knowledge of a company's business
- The dexterity of adapting the perspective of many individuals

Be a good listener; effective communication cannot occur if it is one-sided.

Ask questions. Questions suggest interest and the ability to figure out the problem.

Offer curiosity. It is a good idea to listen while someone talks about himself or herself. The information gathered can be useful in future interactions.

Be sincere. People can tell when they are being manipulated.

Excellent receptionist qualities are middle of the road

- Staying in the middle allows the customer a comfort zone
- Too far to one side or the other puts the customer off
- Everyone wants
 - Cooperation
 - Courtesy
 - Results



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Activity: Professional behavior is best understood from a middle-of-the-road standpoint. We want to stay away from extremes.

Time: 20 minutes.

Break participants into groups of four. Have them write examples of the professional and unprofessional behaviors in a receptionist setting. Ask them to select a representative to present their examples. After their presentations, ask each group to twist the professional behavior so that it is unprofessional. After they have time to discuss the behavior, ask them to choose a behavior to role-play. Examine the professional behavior first, then the unprofessional portion.

Point out to participants where the qualities mentioned earlier are present in their examples. Try to get participants to see the qualities in professional behavior and where qualities could improve nonprofessional behavior.

The skills for just answering the phone are knowledge of the company and its business, adopting the perspective of others and solving problems presented using knowledge of the organization's expectations.

Review of qualities

A talent for solving a wide range of company business problems

An aptitude for internalizing the general knowledge of a company's business

The dexterity of adopting the perspective of many individuals

It's one thing to have the above qualities; it is another to be able to pleasantly deliver these qualities in the course of a day. The skills needed to deliver these qualities are:

Be at ease

Be discreet

Listen

Ask questions

Offer curiosity

Be sincere

Companies want to know if a receptionist will fit well in the company environment. Skills that suggest a receptionist will be a valuable resource to the organization include:

Punctuality

Dependability

Quick learner

Follows instructions

Activity

Working with your group, brainstorm real-life examples of unprofessional and professional behavior.

Unprofessional

Professional

The following is a summary of additional qualities of a receptionist:

A talent for solving a wide range of company business problems

When approached with questions, a receptionist:

- Diagnoses problems
- Creates the next step

An aptitude for internalizing the general knowledge of a company's business

General knowledge of your company's business means:

- Awareness of customers' and clients' needs
- Facts about customers' expectations
- A working knowledge of the products and services a company delivers
- Knowledge of company policies relating to customers and employees
- Telephone competency
- Familiarity with the primary software used by the company
- Knowledge of basic record-keeping principles used by the company

A sense of the company or the power distribution within the organization

The dexterity of adopting the perspective of many individuals

A receptionist must be aware of how to:

Analyze the needs of others in the context of the organizations expectation

First impressions and their importance

It is a well-known fact that people think they can accurately judge who you are in a very short amount of time. As a receptionist, customers, clients and coworkers will not only be judging you, but they will also judge your employer. You want to create positive reactions from coworkers and customers so it makes sense to put effort into creating a strong first impression.

As a receptionist and the first person to greet a customer, you want to ensure the impressions customers and coworkers have of you are exemplary. To accomplish this we look at two areas in which you have control:

- Your personal image
- Your work space

Your personal image

Personal image is the silent signal you send. These characteristics contribute to your personal image:

- Nonverbal cues
- Appearance
- Manner of communication
- Attitudes
- Cooperation
- Self-confidence

You want the silent signal you send to be appropriate for the role, but how do you determine the role? Answer the following questions about your employer:

Where is the business located?

- City
- Small town
- Remote location

How does the business describe itself? What does it say on its Web page or annual report about the image it wants to portray?

First impressions and their importance

Asch found through his research that first impressions are lasting.

- Asch, S. "Forming impressions of personality" *Journal of Abnormal and Social Psychology* 41 (1946): 258-290

Activity:

Time: five minutes

While students are still in groups, go to individual groups, and read them one of two descriptions.

1. Intelligent, industrious, impulsive, critical, stubborn and envious.
2. Envious, stubborn, critical, impulsive, industrious and intelligent.

Ask participants to describe the person in writing. When they have finished writing the description, have them decide if the description is favorable or unfavorable.

After they have finished, tally the favorable and unfavorable marks. Compare the results with Asch's work.

Asch found through his research that first impressions are very lasting. In an experiment, he asked subjects to describe a person who has these characteristics: Intelligent, industrious, impulsive, critical, stubborn and envious. Another group was asked to describe a person characterized as envious, stubborn, critical, impulsive, industrious and intelligent. The only difference in the list was order. The group receiving the positive adjectives first received the most positive description.

Are the results of this activity similar to those of Asch?

Asch, S. "Forming impressions of personality", *Journal of Abnormal and Social Psychology* 41 (1946): 258-290

Your personal image

Nonverbal cues: Your body, your tone of voice and the words you choose are all indicators of how you feel about something. These are cues others pick up from you. You may be good at hiding this information, but there are times when it leaks out and you communicate information you did not want to communicate. Where people get into trouble is in the interpretation of the message. They may be correct in saying this person is uncomfortable about rumors about Mr. Smith, but the reason they are uncomfortable may be hidden. Maybe Mr. Smith is being promoted, and though it is good for Mr. Smith, the receptionist is uncomfortable with the change. We can't tell people to stop judging, but we can be aware that our messages are being interpreted.

Appearance is the first observable characteristic people see. You want to make certain your appearance works with the role of receptionist and the image of your employer.

Manner of communication: You want to include in your personal image the idea that you have the ability to communicate in ways that are effective and appropriate for the situation.

What type of visitors does the business receive?

- Professional Blue-collar workers A mixture

How do visitors dress?

What is your employer's dress code? How do you know this is correct?

What does the boss wear?

Answers to these questions give you material to evaluate the organization's image and to consider the best way to make your image work with the company image.

Appearance

Appearance is the first observable characteristic. You want to make certain your appearance works with the role of receptionist and the image of your employer.

With the information you collected above, take some time to describe the kind of apparel that will best suit your work environment.

Remember, it is important to wear the "uniform." If you don't, you might not get to play. Ask yourself, "Do my choices of colors, hem length, and necklines say that I belong, I'm a professional, I have taste and judgment?"

Manner of communication

You want to include in your personal image the idea that you have the ability to communicate in ways that are effective and appropriate for the situation. This includes:

- Using a voice that is suited to the situation
- Choosing vocabulary that is consistent with your employer's expectations and your customers' expectations.

Attitudes

Attitudes are predispositions to people, places, ideas, or judgments and evaluations. A positive attitude toward your customer improves your organization's image. A negative attitude once detected is difficult to retract. Are you using judgments that could negatively impact your first impression? Be thorough and write down any negative feelings you have for internal or external customers. What could you do to change these feelings?

Cooperation

Cooperation is to associate with another or others for mutual benefit. With whom do you cooperate well?

Self-confidence

Self-confidence is confidence in oneself and in one's powers and abilities.

Your work space

Whether your workspace is elaborate or simple, it needs to be welcoming to visitors and coworkers. The best way to accomplish this is:

- Be organized
 - o Keep clutter to a minimum, always putting away books and files and unneeded supplies when you are finished with them

Attitudes are predispositions to people, places or ideas—in other words, how you judge or evaluate. Usually people act in accordance with their attitudes. It is important that your attitudes toward your customer are positive. A negative attitude once detected is difficult to retract. Negative attitudes can harm your employer and in turn, can harm your situation.

A young woman who was competent as a receptionist worked in a conservative business atmosphere. In the beginning she fit in, and her employer was pleased with his choice of the new receptionist. That changed when she began dating someone new. She decided to save time by wearing to work the outfit she wore when dating her new rock band boyfriend.

What will her conservative employer's reaction be to the change in dress? How does her dress impact her employer's image? What does her choice of dress say about her priorities? If she wants to save her job, what can she do?

Cooperation is defined by the Merriam Webster online dictionary as: To associate with another or others for mutual benefit.

Self-confidence is defined as confidence in oneself and in one's powers and abilities.

Activity:**Time:** 15 -20 minutes**Material:** Flip chart

Divide participants into groups of two or three. Try to group participants who work for similar environments together. Tell groups to take five minutes to brainstorm the differences between telephone and face-to-face customer service environments. Have groups focus on finishing the following sentence:

In the face-to-face customer service environment...

The point you want participants to get is that in a face-to-face environment, the customer can see you and the space where you work. They will make assumptions about you and your employer because of the way your space looks.

After five minutes, stop the brainstorming, and ask each group to report findings and capture these on a flip chart.

Distribute the findings of the first part of the exercise to each group, and ask the group to make rules from these statements. For example: In the face-to-face customer service environment, customers can see what you are wearing. This becomes: Because customers can see what you are wearing, you should always dress appropriately.

- Arrange your equipment and office furniture in a way that is convenient and will cause the least interruptions

Make certain pictures and photographs in your work space are tasteful and support the organization's image
Cartoons and jokes should be in good taste. There is no need to offend anyone

Greeting visitors

To the customer, you are the company, especially for first-time customers or clients. These individuals rarely know what occurs elsewhere in this company. As first-time customers or clients, they are building experience as they go. Their first experience with your company could be with you. So it is important to ensure they are attended to immediately. You can begin with eye contact and a smile.

People speak with their eyes as well as with their words. One way to make your customer feel comfortable is through effective eye contact. By making eye contact with your customers, you will get their undivided attention, and they will have yours. Adding a smile is a great touch. Now you have their attention, and they sense your sincerity.

Use an appropriate greeting:

- Good morning
- Good afternoon
- Good evening

Ask, "May I help you?" You should personalize this question so it matches your employer's vision of services. Of course, you should seek out a customer's needs and questions and offer assistance.

Write down a few greetings, and practice with a partner.

As a receptionist, it may be your job to:

- Take information
- Confirm appointments
- Inform their party of the visitor's arrival
- Respond to questions, inquiries or complaints

Greeting visitors

- How important are eyes when greeting customers?
 - 45% of interaction time looking at eyes
 - We establish relationships with our eyes
- Eye behavior:
 - influences attitude change & persuasion
 - indicates degree of interest
 - expresses emotions
 - regulates interaction
 - indicates power
 - forms impressions in others

Occasionally, you will receive a business card from a visitor. The best thing to do when this happens is to say thank you and spend a moment reviewing the card. Then place it out of the way. You may find you can use it in the future, or you may dispose of it.

When greeting customers, you should use your attending skills. Make certain your eyes, ears and body are open to what is happening. Use a genuine smile and an enthusiastic voice.

Experience with special needs can be invaluable to a receptionist. Ask participants the kinds of special needs individuals they have had experience with. Make a list on the flip chart.

Ask what their fears are when dealing with special needs individuals.

Then ask what kind of information is necessary to make a special needs person as comfortable as possible.

Ask participants about their experience with special needs persons. Some participants may have family members with special needs. Their insights may be of use to the rest of the class.

No matter what a person's special need is it is always imperative to recognize the person. Do not ignore them. Some people unconsciously ignore people with disabilities because they are unsure of what to do. As a receptionist, greet the person with special needs just as you would any other.

Be prepared to shake hands. If someone has limited use of limbs and offers a left hand, use your left hand. If an individual is blind, ask, "Shall we shake hands?" Then bring your hand to theirs.

Be sensitive to language. Avoid using the words handicapped or disability.

If the person is visually impaired, alert them to your approach. Tell them your name and your purpose in approaching them. Always ask permission before handling a guide dog.

Dealing with special needs

It is important to know what to do and what to say when you are around people with special needs. A rule of thumb is to always be polite. It is good manners to know the right type of language to use during an interaction with a person with special needs. In the following situations, how would you work with special needs persons?

Greeting

Persons in wheelchairs

Visually impaired persons

Persons with limb loss

Hearing impaired persons

What do you do when listening to persons who have difficulty speaking?

What do you do when you have no idea what to do (i.e., you meet a person with a need you have never seen before?)

For hearing impaired people, make certain to place yourself in their line of sight. Use short declarative sentences. If the person lip reads speak slowly but don't exaggerate. Keep hands and other things away from your face while speaking. If an interpreter is present, make certain to speak to the person, not the interpreter.

Handling security and emergency procedures

Today, security is a concern for every business. Security issues range from physical threats to technological threats. Depending on the size of the organization, there may be well-established security protocols and procedures. It is essential for the receptionist to become familiar with these documents.

Physical threats

<i>Emergency</i>	<i>Person in charge</i>	<i>Your responsibility</i>	<i>Special circumstances</i>	<i>Special building procedures</i>
<i>Fire building evacuation</i>				
<i>Severe illness or injury</i>				
<i>Severe weather</i>				
<i>Bomb threats</i>				
<i>Workplace violence</i>				
<i>Crimes being committed</i>				
<i>Hazardous material</i>				

Note: More security information is located in the Appendix.

As the most visible person in the organization you may be the first to encounter danger. Some protocols include badges or identification cards that are worn on your person. Know the procedures for getting visitors' badges and make certain to always follow, established procedures. For smaller organization there may not be defined protocols. What are the protocols for your organization?

Activity: Allow participants five minutes to fill out this table. Encourage them to complete it and post it at their workplace.

More information on security can be found in the Appendix.

Exercise:

Time 10 - 15 minutes

In this exercise you are spending time creating an awareness of security issues. Before, you discuss each section of information ask the participants to write down what they know about the procedures their organization has in place for:

- Fire
- Building evacuation
- Illness
- Injury
- Severe weather
- Bomb threats
- Work place violence

Computers that are linked, allowing you to view the files on one computer from another computer, are **networked** together. When you include Internet capability for each networked computer, **firewalls** are necessary security measures. Firewalls protect individual computers on the network from **hackers** or individuals who (for fun or profit) break into secure areas.

When you receive e-mail you are open to threats from worms, Trojans, spyware and many types of malicious e-mail attachments. It suffices to know that **scanning** your e-mail with up-to-date virus software will help stave off these threats.

SPAM is unsolicited e-mail on the Internet. Simply put, SPAM is similar to the junk mail the mailman delivers. It can be annoying when it fills your in-box daily.

Technology threats

For many companies, computers are an extremely important part of business. For that reason, IT professionals (or information technology professionals) are in charge of computer security. However, it is always helpful to know some of the security terms used by these professionals.

Network

When computers are linked together and you can view files on one computer from another computer.

Threats through e-mail

Name some threats that come through e-mail:

How do you stop threats through e-mail?

SPAM

SPAM is unsolicited e-mail on the Internet.

Qualities of valued receptionists checklist

Because you never get a second chance to make a first impression it is important to:

- Create a personal image that works with the company image
- Realize your work space needs to be welcoming to visitors and coworkers
- Greet visitors with a smile
- Know the particulars of dealing with special needs
- Be prepared by knowing security and emergency procedures

