

# How to Become an Outstanding Receptionist

## Course Workbook

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Name

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Event Number / Date



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Phone 800-556-3009

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# Greeting visitors

1. Acknowledge guests quickly – even if you are in the middle of a telephone conversation.
2. Be prepared with some positive opening comments.
3. Use a welcome board when possible.
4. Exhibit a “real” smile.
5. Introduce yourself.
6. Use appropriate eye contact.
7. Be prepared to use the visitor’s name. (Remember, people’s names are music to their ears.)
8. Listen and learn.
9. Provide an uncluttered and comfortable environment.
10. Introduce people by telling each something about the other.
11. Deal assertively and graciously with those who arrive unexpectedly.
12. Do not ignore people. Follow up; check back and interact.

7/11  
RULE

7 SECONDS  
11 IMPRESSIONS (FIRST)

• Special situations:

# Business roles and functions of an outstanding receptionist

Working with your group, identify and note the many areas of responsibility your jobs encompass.

1. ANS PHONES
2. GREETING PE
3. SCHED APP.
4. SCAN
5. CHART MAKING.
6. INS. VERIFY.
7. KNOWLEDGE OF BUSINESS.
- 8.
- 9.
- 10.

# Business qualities of an outstanding receptionist

Working with your group, identify and record qualities that enhance the value of an outstanding receptionist.

1. MULTI TASK.
2. ORGANIZED.
3. PEOPLE PERSON.
4. KEPT WELL.
5. POSITIVE ATTITUDE.
6. SELF CONTROL.
7. SENSE OF HUMOR.
- 8.
- 9.
- 10.

# Outstanding receptionist: Self-check No. 1

Take the following true/false quiz to see how your telephone skills measure up.

1.  T  F In the first ten seconds of answering the telephone, your voice tone creates the image of a smiling, caring expert.  
Notes:
2.  T  F Callers are glad *you* answered, because you are easy to talk with and helpful.  
Notes:
3.  T  F You become the caller's friend.  
Notes:
4.  T  F You are as energetic, pleasant and helpful with the telephone call that comes in one minute before going home as you are with the very first telephone call of the day.  
Notes:
5.  T  F When you answer the telephone, callers immediately know they have dialed the correct number.  
Notes:
6.  T  F You answer within three rings and your company's identification answer is not too long.  
Notes:
7.  T  F You always use positive phrases that make your callers feel hopeful and content (even when you cannot give them the exact replies they want).  
Notes:
8.  T  F After callers have identified themselves, you never go back at the end of the conversation and ask, "Now what did you say your name was?"  
Notes:
9.  T  F Callers hardly notice when you screen telephone calls and do not feel offended.  
Notes:
10.  T  F You stay in control and deal with difficult callers skillfully.  
Notes:

Count the number of true answers you have. **10 – Perfect.** You are an expert: an example of the best getting even better. **8 to 9 – Very good.** You also have a positive attitude that keeps you eager to "fine tune" your skills. **6 to 7 – OK.** But you can be so much more valuable after today. **3 to 5 – Just getting by.** You have the basics. But you need definite improvements in order to survive. **1 to 2 – Warning.** You need all the help you can get. But you also have the greatest opportunity for improvement!

# Visual image

## Personal considerations

1. Wear “classic” styles. They are always acceptable. For women, include dresses and “mix and match” jackets, skirts and blouses. For men, include a blazer, dress shirt and a conservative tie.
2. Wear clothes with a conservative fit, not too small or tight, and not too baggy or loose.
3. Wear a color close to your face that is especially flattering to you.
4. Remember, clothes with long sleeves give a more authoritative look.
5. Avoid clothes with any logo other than that of the organization for which you work.
6. Avoid too many distracting accessories, such as four pairs of earrings at once, a ring on every finger or extremely high heels in a bright color with patterned tights.
7. Avoid anything “see through.”
8. Avoid short mini-skirts.
9. Avoid skimpy dresses or low-cut blouses.
10. Have a pleasant smile on your face. Others will notice that first.

## Office considerations

1. Keep your desk and work space uncluttered and orderly.
2. Avoid too many personal items on your desk: coffee mugs *and* family photos *and* a sweet dish *and* homemade crafts are *all together* too much.
3. Display business books, certificates and plaques rather than personal ones.
4. Try to avoid noise clutter by keeping your telephone away from copiers, vending machines and other noise makers.
5. If you use answering equipment, record very clear messages for after hours or other times.

# Qualities of good speech

**Alert:** awake, interested

**Pleasant:** a smile in your voice

**Natural:** straightforward language, avoiding technical jargon

**Enthusiastic:** glad the person called

**Distinct:** easy to understand with moderate volume and rate

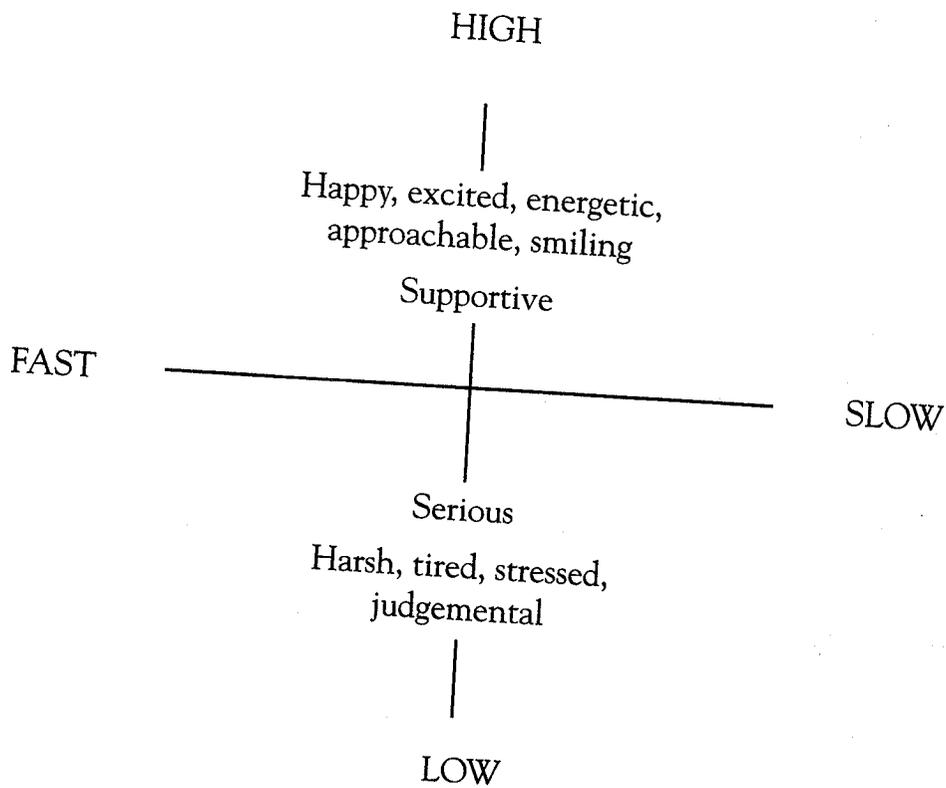
**Expressive:** well modulated, varied tone

**Pronunciation:** correct and clear, regardless of regional accents

**Language:** never use slang, and minimize the use of colloquial and fashionable expressions; be professional

- BODY LANGUAGE

# Voice pitch and rate



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Compose an effective wording for answering your company's telephone calls:

- IDENTIFY COMPANY & SELF .
- SOUND LIKE YOU CARE .
- FOCUS ON POSITIVE .
- TAKE NOTES .
- ASK FOR FEEDBACK .
- WATCH TONE .

LOST

# The art of listening

Most of us like people who will *really* listen to us and encourage us to talk about things that are of special interest. Because we want to talk and express our own thoughts, listening seems to be one of the most difficult skills to develop.

To give yourself a listening "check up," ask yourself the following questions:

1. Do you limit your own talking and refrain from interrupting before the person is finished? You cannot talk and listen at the same time.
2. Do you ask open-ended questions? If you do not understand something or feel you have missed a point, clear it up then before it embarrasses you later.
3. Do you refrain from mental arguing or forming opinions *before* others have finished explaining themselves?
4. Do you take notes about important points? It is a good idea to have a pencil in your hand *before* you answer the telephone or begin talking with someone in your office.
5. Do you try to think like those talking to you? Empathy can save the day.
6. Do you make occasional "listening" sounds, such as "Yes" and "I see," or paraphrase and repeat back some of what is being said to verify to yourself and others that you are "on track?"
7. Do you concentrate and try to block out distracting thoughts, noises or interruptions? (This may mean calling the person back or asking that calls be held while you deal with a difficult situation.)

- ASK QUESTIONS
- FOLLOW UP QUESTIONS
- CLARIFYING
- TAKE NOTES.

# Positive phrasing

Working in your groups, respond in a caring and positive manner to the following questions and statements without using one "negative" word or phrase (such as, "You will *have to*" ... "not" [in any form] ... "unable" ... "against policy or rules" ... "no" ... "never" ... "should not" ... and other negative word combinations). Be careful. Really think about this new technique.

1. I have left messages three times today for one of your staff members to call me with some information. I cannot get a response – why not?

LET ME SEE HOW I CAN HELP YOU OR  
FIND OUT FOR YOU.  
VERY BUSY MISSED LUNCH WILL RETURN  
ASAP.

2. Your other receptionist was rude to me. I do not have to put up with that kind of treatment!

IM SORRY YOU FEEL THAT WAY  
LET ME SEE HOW I CAN HELP YOU.

3. I cannot keep my appointment today. I would like to come in tomorrow morning instead. (The calendar is already full for tomorrow morning.)

THANK YOU FOR CALLING.  
LET ME SEE OUR NEXT AVAILABLE DR  
OR OFFER 2 NP OTHER LOCATIONS.

4. My business is not doing well, and I cannot make my payment this month.

SO SORRY TO HEAR THAT  
A GOOD WILL GESTURE \$20 WOULD BE  
GREAT.

# Message taking

How many parts of a good telephone message can you list?

1. CALLERS NAME
2. WHO FOR
3. ORGANIZATION
4. RETURN # & EXT
5. DATE & TIME
6. RETURN CALL OR MESSAGE
7. BEST TIME TO RETURN
8. YOUR NAME
9. COMPLETE MESSAGE

How to save time with "call returns": schedule one or two best times for the telephone call to be returned, whether you are leaving a message or taking one.

GATE KEEPER  
Screening telephone calls

Be assertive and in control.

Get results.

**Instead of:**

"May I ask your name?"

Say: WHO AM I SPEAKING TO

**Instead of:**

"May I take a message?"

Say: WHAT IS THIS IN REFERENCE TO

**Instead of:**

"OK", in reply to "I'll ring back later."

Say: LEAVE YOUR NAME & # HE WILL CALL ASAP.

If you are usually asked by your managers or colleagues to take a message, avoid an unpleasant situation by reversing your response and offering the probable excuse *before* asking the caller's name.

- TAKE CONTROL
- DO NOT GIVE OUT PERSONAL INFO -
- GET ALL INFO.

# Steps for dealing with upset people

1. Be glad when a person shares with you his or her feelings of discontent. It can be a compliment that implies that the person still has confidence in your interest in the problem and your ability to do something about it.
2. Think of the situation as an opportunity to "shine."
3. Do not take it personally or become defensive.
4. Show genuine care and concern.
5. Listen.
6. Let the complaining person "vent"; do not interrupt with defensiveness.
7. Do interrupt the *confused* caller and offer guidance.
8. Apologize assertively when you have made a mistake.
9. Express empathy.
10. Take notes about the situation.
11. Tell the upset person what you can do.
12. Try to find a solution you can both agree upon.
13. Thank the person for sharing his or her concerns.
14. Follow up later when appropriate.
15. And remember: phrase your comments *positively*.

L - LISTENING  
E - EMPATHY  
A - APOLOGY  
P - POSITIVE PHRASING  
S - SOLUTIONS

Q - QUIT  
T - TAKING  
I - IT  
P - PERSONALLY

# Notes

= THIS SOUNDS IMPORTANT HERE'S WHAT I CAN DO .

- RESPONSE ANSWERS IN BOOK.

# Difficult situations

1. Demanding caller: "I have to have that information now! I cannot wait until tomorrow afternoon!"

I WILL DO MY BEST TO HAVE THAT  
DONE FOR YOU. THIS AFTERNOON WE USUALLY  
ASK FOR A DAY OR TWO TO HAVE READY  
LET ME CALL YOU WHEN ITS DONE.

2. Rambling caller: "Hello. How are you? How was your weekend? Let me tell you about my grandchildren. ..." (Three other lines are ringing.)

- HELLO, PLEASE HOLD FOR A MINUTE  
I'M ALONE & THE PHONES ARE RINGING.  
- PLACE OTHERS ON HOLD & ANSWER IN ORDER.  
- TRY & KEEP IT SHORT & SWEET.

3. Confused caller: "I do not know if you can help me. I have telephoned everywhere. I am not sure I have the right place. These things are so difficult."

LETS SEE WHAT WE CAN DO  
TRY & HELP ie: GOOGLE # THEY ARE LOOKING FOR.  
- CALLING FOR  
- CALM CALLER DOWN.

4. Foul-mouthed, abusive caller: "!! # \* sxgth! yzqf!"

THERE IS NO REASON FOR THAT LANGUAGE.  
LETS CALM DOWN & SEE WHAT WE  
CAN DO.  
TO  
- STAY CALM TALK THEM IN CALMING MATTER.

FAQ

# Time-saving techniques I will begin using

1. Have a pre-workday conference
2. Communicate internally
3. Conduct a "busy circuit" study
4. Use an in/out board
5. Post messages at your desk
6. Plan your telephone calls before you make them
7. Use answering machines
8. Create a resource book
9. Provide cross-training
10. Learn to say no assertively
11. Assess priorities
12. Monitor the department's budget, especially for expenditure
13. UNDER PROMISE OVER DELIVER.
- 14.
- 15.

# Notes

## SAFETY TIPS!

- KEEP PERSONAL INFO PERSONAL.
- HIDE ITEMS THAT CAN BE USED AS WEAPON.
- HAVE PANIC BUTTON
- EMERGENCY PROCEDURES.
- CLEAR VIEW LOBBY AREA.
- KEEP AN UNBLOCKED EMERGENCY EGRESS.

## - TIME MANAGEMENT:

- USE DAILY TO DO LIST
- PRIORITIZE
  - IMPORTANT / NOT IMPORTANT (I/NI)
  - URGENT / NOT URGENT (U/NU)
- KEEP INTERRUPTION LOG.
- TRY A TIME AUDIT TO SEE WHERE YOU ARE SPENDING YOUR DAY.

## MULTI-TASKING

- DO I&U FIRST
- HAVE SYSTEM TO IDENTIFY I&U
- DON'T BE AFRAID TO ASK FOR HELP
- KEEP A NOTE BOOK WRITE EVERY THING YOU ARE WORKING ON. GO BACK OVER CROSS OUT WHEN FINISHED

