

So, you're a receptionist...?

This workbook is designed to help you develop your own skills and knowledge in your role as a receptionist. It is split into small chunks of learning, and is designed to enable you to develop your understanding of what it means to be an excellent receptionist by posing some questions, and stimulating your thinking.

This workbook is intended as a resource for your own learning and development. You'll get the most out of it if you jot down your ideas and questions as you work through the book. You might also find it useful to talk to others in your service or discuss your learning with a learning 'buddy' or line manager. This workbook is also designed as a resource to accompany face-to-face reception skills training and internal induction training. It is not intended just to be read – the more active you can be in your own learning, the better the learning will stick with you!

So, remember – 'Read, Reflect, Relate'

Start your learning journey by thinking about yourself

Reflect...

What motivates you to be the public face of your organisation?
What skills are you using most? What makes you a good receptionist?



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Advice Service Receptionist

Read...

In most advice services, the receptionist is the first person a client meets when s/he is seeking advice. The receptionist is the public face of the advice service and in many agencies, acts as the “gatekeeper”, managing clients’ access to the service. The receptionist’s skills and knowledge are equally as vital to the effectiveness of the advice service as those of an adviser, and reception can only operate effectively if it is properly valued and supported by the entire service.

In developing your skills and knowledge as a receptionist, it’s really important to put yourself in the client’s shoes and consider the range of emotions they may be feeling about asking for help.

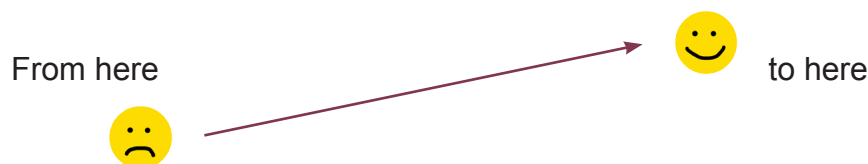
Reflect...

How might a client be feeling when they enter your advice service? Anxious? Worried? Embarrassed?
Find your learning ‘buddy’ & discuss this for 5 minutes.
Then, jot your ideas down here...

As the public face of the organisation and the first person a client meets, receptionists need to ensure they have excellent customer service skills. Clients present to the service in a range of emotional states. A receptionist has the very important job of ensuring that the client is treated with care and respect, regardless of their enquiry or whether the service is able to help them.

Relate...

What can you do to change a client's state?



Read...

In most advice agencies, the receptionist's role will include some or all of the following tasks:-

- **“meeting and greeting” clients:** making them welcome; allaying fears and anxieties; finding the most effective form of communication
- **providing information** about the services available at the advice centre
- **assessing the nature and urgency of the enquiry** and liaising with colleagues to arrange appointments or urgent advice
- **“sign-posting” clients** and providing information about other local advice services
- **supporting clients to access self-help materials**, such as PCs, leaflets, telephones etc
- **managing difficult situations:** e.g. distressed or abusive clients or large numbers in the waiting area
- **arranging and updating displays of information materials**, such as leaflets and factsheets

Advice Service Receptionist

In order to carry out this role effectively, reception staff need a range of skills and knowledge which will usually be acquired through training, shadowing others and getting on-the-job experience; all of which should be supported by supervision and appraisal.

This workbook is another string to your learning bow – use it to identify both what you already know, and perhaps also what you need to know.

We will now take each of the main reception tasks in turn and consider them in more detail.

Key task 1:

“meeting and greeting” clients: making them welcome; allaying fears and anxieties; finding the most effective form of communication

We’ve already looked a little at how clients might be feeling, and discussed the importance of good customer service as inherent to sound reception skills.

Positive body language is equally important, and should be used by the receptionist to show that they are listening to the client. Smiling, ensuring good eye contact and having an open body stance are all good ways of making the client feel welcome and at ease.

Reflect...

How else could you ensure that you’re meeting and greeting clients effectively? How do you use your body language to put clients at ease? Ask for feedback from your learning ‘buddy.

Relate...

Talk to your learning 'buddy', and together come up with a few phrases or responses that you could use in response to a client who presents in the following way:

Scenarios	Phrase/ Response 1	Phrase/ Response 2	Phrase/ Response 3
An elderly man starts coughing uncontrollably in the waiting area			
A pregnant woman is looking for a free seat in the busy waiting room			
A client you don't recognise comes into the waiting room and heads straight for the advice room			
A man who has been waiting for 30 minutes complains when he sees another client called to the advice room before him			

Advice Service Receptionist

There are some religious, cultural or practical considerations that you may need to consider. Discuss the following questions in collaboration with your learning 'buddy';

Should you shake your client's hand?

What should you do if a client stares blankly at you when you ask, 'Can I help you'?

Should you offer tea or coffee to your clients?

Key Task 2:

Providing information about the services available at the advice centre

In particular, the receptionist must have a thorough knowledge of the services provided at the advice centre and of the advice services delivered by other local providers.

Relate...

Make a list of all the services that your advice centre provides for clients

Key Task 3:

Assessing the nature and urgency of the enquiry and liaising with colleagues to arrange appointments or urgent advice

Read...

Clients who access an advice service often have lots of interlinking problems and come for help with some or all of these. They are often unaware of the processes and procedures for accessing your service. In some agencies, it is part of the receptionist's role to help clients to navigate these effectively, whilst ensuring the client receives the best care and the service takes on only those clients that meet its criteria.

The key to undertaking this task* successfully is being able to ask appropriate questions and collect brief details of the client's enquiry. This will enable you to find out:

- Why the client has attended the centre – i.e., the main issue they present with
- Which area of social welfare law their enquiry relates to, e.g., is it a benefits enquiry, housing issue, or maybe a combination of both
- Whether there are any urgent matters, i.e. court or eviction dates within the next few days

By asking appropriate questions, you should also be able to discover, at this early stage, whether the client has enquiries which are outside of the remit of your service. This is why it's important for you to have a good knowledge of the full range of services that your advice centre provides.

Other agencies have a process which takes the client to an assessor for an evaluation of their issues. It is important to fully understand the process in your agency. Within CAB services, it is often the 'Gateway' staff and not the receptionist who undertakes this triage function.

Reflect...

What sorts of questions can you ask a client?

Observe another receptionist for an hour or so, or the current receptionist if you're brand new to the role. Make a list of the sorts of questions that he or she used to discover brief details about the client's enquiry. Also make a note of the client's responses - were they brief or did they want to tell the receptionist more?

Use this template if you like.

Questions asked	Client's responses

Now discuss these with your learning 'buddy', and critically review them together.

You may also have noticed through your observations, or through your own experiences, that clients quite often have lots to say! Some may want to tell you – the receptionist - the detail of their whole story or enquiry.

Reflect...

What's the problem with this?

What skills might you need to use to ensure that you take only the key pieces of information that you need from the client?

Key task 4:

“sign-posting” clients and providing information about other local advice services

Reflect...

As a receptionist, you are likely to have responsibility for directing clients to alternative services that may be able to better meet their needs.

There are key differences between the tasks of sign-posting and referring clients.

It would be useful to check how these terms are defined within your own organisation, as the terms are sometimes used interchangeably. Team up with your learning ‘buddy’ and discuss.

Record your discussions below.

Signposting is ...

Referring is ...

You may or may not be involved in referring clients, but you will certainly have to signpost, so it’s important that you are clear about the correct procedures for this within your advice service.

Key Task 5:

Supporting clients to access self-help materials, such as PCs, leaflets, telephones etc.

Read...

Advice services in the voluntary and community sector exist to empower clients to exercise their rights and engage with their responsibilities. Often clients need specialist advice from an adviser in order to challenge decisions or determine their options. However, there are occasions when clients can help themselves. Information about certain rights and remedies can be available in many reception waiting areas. Self help materials in the form of leaflets, internet-ready computers and freephone telephones may be used by clients while they wait for an appointment; or as an alternative to an appointment, if the basic assessment reveals that service is unsuitable for their needs. One of the roles of a receptionist might be to help a client to access or understand this information.

What is involved in giving information?

Legal information consists of the provision of information about the law as it applies generally on a given matter. It is then the responsibility of the person who receives the information to decide how it applies to his or her particular situation and what actions/ he should take. For example, a client may be given information – such as a leaflet or fact sheet - about the circumstances in which a landlord may seek re-possession of a property or the criteria for entitlement to claim Income Support. It is then for the client to attempt to apply the legislation to his own specific circumstances.

Let us consider the example below.

Read...

Mr Syed calls into the advice centre and tells the receptionist that he has recently been dismissed by his employer and wants to make a claim against his employer for unfair dismissal. The receptionist makes an appointment for him to see an employment adviser and gives him a leaflet about employment rights.

Think about how the receptionist responded to the request from Mr Syed. Were her responses & actions appropriate? Write down your ideas & notes here...

Reflect...

Read...

The receptionist has given the client some general information about employment rights; she has not attempted to tailor this information to fit his particular situation. It is then Mr. Syed's responsibility to find the information he is seeking from the leaflet and to take any action which then seems necessary.

Information is usually in the form of:-

- a factsheet or leaflet
- a website: e.g. DWP, ACAS
- contact details for another service

The receptionist may perhaps indicate the sections of the leaflet or website which may be of interest to the client: for example, the information given in a leaflet on employment rights about the procedure for making an application to the Employment Tribunal. This may be especially necessary if the client appears confused or is not confident in using the internet or written materials.

However, the receptionist does not attempt to relate this information to the client's specific query nor make any comment about what action he should take. This is the key point!

So, what are the key learning points from this example? Share this with your learning 'buddy' and jot your thoughts down here...

Relate...



Key Task 6:

Managing difficult situations: e.g. distressed or abusive clients or large numbers in the waiting area

Read...

There are certain situations that you will come across, which may be unpleasant and are difficult to prepare perfect solutions for in the way that you might prepare a local services directory for clients with issues that cannot be resolved by your service.

It can be useful to think about some of these in advance, which may increase your confidence when you do come across them; which in turn is likely to improve the way that you handle them.

Relate...

Have a look at the following scenarios, and imagine the person experiencing them is you. How would you deal with them? *

There are 10 clients in the queue and the phone keeps ringing. What can I do...?	
The client insists that he has an appointment, but I can't find a record of this. What should I do...?	
A client starts shouting at me over the telephone, when I tell her that we don't give telephone advice. What should I do...?	
There aren't enough chairs in the waiting area. Some clients are standing. What should I do...?	
It's 11.50. The drop-in closes at 12pm, but the waiting area is still full of clients. What should I do...?	
I can't understand what the client is saying. What should I do...?	
I have to turn away the client who is crying in the waiting area. The adviser says we can't see her. What should I do...?	

**Always seek the advice of your supervisor if unsure*

Key Task 7:

Arranging and updating displays of information materials, such as leaflets and factsheets

It's useful to keep a log of the resources used by the clients of service, and to review this from time to time.

What could you do to check that your information materials are as up to date as possible?

How can you make sure that you have plenty of stocks of materials that are most useful to clients?

Relate...

Record your ideas here...

Now that you have travelled through this workbook and hopefully gained an insight into the key tasks, responsibilities, and challenges faced by a receptionist, it's important to create a plan of action. This should remind you of your main learning points, as well as note any action points which will help embed this.

Use the template on the next page, if you like.

My Action plan

List the top 5 learning points that you have taken away from completing this workbook.

- 1.
- 2.
- 3.
- 4.
- 5.

Now list the 3 things that you have to do to extend or consolidate your learning.

My actions	By when?	Who will help/ support me?	I'll know I've achieved this when...
1.			
2.			
3.			