

# Easy Steps



## Unit 122 (V6)

**Provide office reception services**

- ☒ Easy to follow
- ☒ Step-by-step instructions
- ☒ Covers Unit Standard Criteria

*A Cheryl Price Publication*

## **Unit Standard 122 (Version 6)**

### **Provide office reception services**

This book covers the course outline for the following New Zealand Qualifications Authority Unit Standards:

Unit Standard 122 - BUSINESS ADMINISTRATION (Level 3, Credit 5)  
Provide office reception services (Version 6)

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# Introduction

This workbook has been written to Unit Standard 122 version 6, Provide office reception services. It covers a receptionist's function and responsibilities, how to provide appropriate reception services, eg answering telephone calls and greeting customers, the skills and behaviours required of a receptionist, and maintenance of a safe and secure reception area, including health and safety requirements and what to do in an emergency.

## How this book is organised

### Section 1 – The Receptionist

This section introduces you to the receptionist, their function, responsibilities and the skills they require. It discusses why the role of a receptionist is so important, particularly in terms of providing good quality customer service. It also identifies the attributes of a good receptionist, including personal qualities such as communication skills and maintaining a professional image.

### Section 2 – A Receptionist's Skills and Behaviours

This section explains in depth how a receptionist's skills and behaviours are used in the workplace. It covers how a receptionist looks and behaves. Both verbal and non-verbal communication skills are covered, as is the importance of recognising and dealing with confidential information in an appropriate manner. Included in this section also is information on the Privacy Act and Human Rights Act and also how to convey information clearly. For a receptionist, time management, problem solving and conflict management are all key skills – these skills and attributes and more are explained in terms of how they help a receptionist do their job.

### Section 3 – Providing Reception Services

Good customer service is key to customer retention. In this section you will learn about providing great quality customer service, particularly greeting and receiving visitors, making appointments, maintaining reception records, dealing with queries and providing information.

### Section 4 – Telecommunications Equipment

Understanding how the telephone system works is a key part of providing reception services. This section discusses how to answer the telephone correctly, respond to a caller's enquiry, transfer calls, close calls and take messages.

### Section 5 – The Reception Area and Dealing with Emergencies

The reception area the receptionist's work space. It must be inviting and safe. This section looks at what is found in a reception area, health and safety issues, and what a receptionist's role is during emergencies (fire, medical, hold-up, etc).

## How to use this book

This book has a structured progression of skills and knowledge; it is most effective if you start at the beginning of the book and work through each section in order. Each section begins with outlining what you should be able to do by the end of the section. There is a revision page at the end of each section that you can use to check your knowledge (except section 1). Role plays are also included for sections 2, 3 and 4. There is an assignment task at the end of section 5.

*It is strongly recommended that the role playing exercises and assignment in this book are completed as they help the learner with the practical element to unit standard 122 version 6.*

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## Unit Standard 122 Version 6

<b>Title</b>	<b>Provide office reception services</b>		
<b>Level</b>	<b>3</b>	<b>Credits</b>	<b>5</b>

<b>Purpose</b>	People credited with this unit standard are able to: explain the receptionist function within an organisation; provide reception services; and explain requirements for maintaining a safe and secure reception area.
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<b>Classification</b>	Business Administration > Business Administration Services
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<b>Available grade</b>	Achieved
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### Explanatory notes

- 1 All activities associated with this unit standard must comply with the requirements of: Health and Safety in Employment Act 1992, Copyright Act 1994, Human Rights Act 1993, Privacy Act 1993, and their subsequent amendments.
- 2 Definition  
*Cultural sensitivity* relates to people's age, gender, diversity within races, sexual orientation, special needs, and religion.
- 3 *Time management skills* include but are not limited to – analysis of activities, prioritisation of tasks, budgeting of time, identification of time wasters, review of use of time.

### Outcomes and evidence requirements

#### Outcome 1

Explain the receptionist function within an organisation.

#### Evidence requirements

- 1.1 The receptionist function and responsibilities are identified and described in terms of their importance in maintaining quality customer service.  
  

Range	quality customer service includes but is not limited to – customer interactions, knowledge of the organisation.
-------	-----------------------------------------------------------------------------------------------------------------



- 1.2 The skills and behaviours required by a receptionist are identified and explained.

Range skills and behaviours include but are not limited to – cultural sensitivity, time management, verbal and non-verbal communication, empathy, professional image, management of conflict, maintenance of confidentiality, discretion, respect for people and information, ascertaining requirements, problem-solving, positive attitude.

## **Outcome 2**

Provide reception services.

### **Evidence requirements**

- 2.1 Office reception services provided are in accordance with office requirements.

Range services – customer interaction, appointments, diary management, receptionist records, operation of telecommunications equipment, internal and external information provision.

- 2.2 Skills and behaviours for reception demonstrated are in accordance with office requirements.

Range skills and behaviours include but are not limited to – cultural sensitivity, time management, verbal and non-verbal communication, empathy, professional image, management of conflict, maintenance of confidentiality, discretion, respect for people and information, ascertaining requirements, problem-solving, positive attitude.

## **Outcome 3**

Explain requirements for maintaining a safe and secure reception area.

### **Evidence requirements**

- 3.1 Requirements for maintaining a safe and healthy environment in the reception area are explained in terms of office and legislative requirements.

- 3.2 The responsibilities of the receptionist role in handling emergencies and crises in the reception area are explained in accordance with office requirements.

Range may include but is not limited to – emergency procedures for fire, earthquake, hold-up, bomb scare; contact information for emergency services and for safety officer; contact information and procedures for medical and first aid emergencies; evidence of three is required.

- 3.3 The visitor security system is explained in accordance with office requirements.

Sample Document

## The Receptionist

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### Learning Outcomes

*At the end of this section you should be able to -*

- ☐ Explain the receptionist function
- ☐ Identify the responsibilities of a receptionist and describe them in terms of maintaining good quality customer service
- ☐ Identify the skills and behaviours required to provide great reception service
- ☐ Identify the various types of customers a receptionist would communicate with

# The Receptionist

In many ways the receptionist is the most important employee of an organisation. The receptionist is usually the very first person a customer meets when they walk in, and is the person who will answer all the organisation's telephone calls.



Generally speaking, a receptionist is –

The *frontline* employee of the organisation - the person employed to greet customers, answer the telephone, respond face to face to queries. The receptionist is often the public face of an organisation (while doing lots of useful work behind the scenes for other employees too).

The receptionist's role can be rewarding as they talk with many different people in a single day. It can also be demanding as they need to be able to juggle several tasks at the same time while still keeping their cool and delivering professional service.

The term *reception services* refers to the tasks that a receptionist performs, eg answering the telephone, redirecting calls, greeting customers, making appointments, providing information, keeping diaries, updating records, etc.

## Why is the role of a receptionist so important?

The receptionist is the first person that a customer will come into contact with and therefore they set the scene for how that customer will view the organisation. Every organisation strives to give good quality customer service, and this starts with the first person they meet, ie the receptionist. If the first impression of an organisation is negative, it will be very hard to change the customer's opinion. Therefore the receptionist plays a vital role in providing good customer service.

The way a receptionist talks, acts and looks will all give an impression to a customer. This impression could range from "we are an efficient, friendly company to deal with" to "we are slow, impolite, disorganised and uncaring". How the receptionist acts has a lot to do with which message is sent out.

### Exercise 1

Next time you contact an organisation think about the receptionist, was s/he polite and friendly, did s/he help you appropriately, was your query answered, did s/he look smart? In the space below briefly write about your experience and evaluate whether or not it was a good one or not and give a reason why.

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# Responsibilities and Skills of a Receptionist

A receptionist's day varies as they usually have a wide range of responsibilities. One common theme is that they will usually interact with customers for a large part of their day, rather than working on their own.

A receptionist will deal with two types of 'customer' – internal and external. An internal customer is another member of the organisation. Internal customers might contact the receptionist to find out information on the organisation such as staff contact details, policies and procedures, product and customer information. A receptionist may also perform certain tasks requested by staff, eg send a fax, photocopy a document. –

An external customer comes from outside the organisation – external customers might telephone or visit in person. They will often have a query, such as the price of a product, how to order a service, the state of their account, etc.

## A list of responsibilities

A receptionist's responsibilities can be broken down into groups as follows. Note though that not ALL receptionists will do ALL these tasks – this will depend on the particular role and the organisation.

### ***Immediate front-line responsibilities***

- Greet visitors/customers
- Screen visitors and callers
- Receive customers (record their visit, issue visitor badge, notify the staff member of their arrival, etc)
- Answer the telephone
- Redirect telephone calls to the appropriate staff member
- Take and relay messages to staff accurately
- Keep track of the availability of staff
- Provide security to ensure that only authorised persons enter the organisation's work areas

### ***Day-to-day responsibilities***

- Make calls (international, national and mobile) for other staff
- Maintain telecommunication records, eg record international, mobile, national calls, check calls made with telephone account records
- Send fax transmissions
- Deliver fax transmissions received
- Monitor the organisation's answer machine or answer service, eg record outgoing message, retrieve messages left
- Provide routine clerical and word processing services, eg type documents, send emails
- Provide information to customers about the organisation and its products and/or services
- Provide appointment scheduling, eg make and confirm appointments
- Log and sort mail
- Organise catering, travel and other activities
- Operate scanner, photocopier, binder, laminator and other office equipment

- Maintain and organise office supplies
- Look after petty cash
- Maintain a safe, healthy, appealing reception area
- Keep up to date contact details relating to the organisation and its staff
- Keep up to date emergency service phone numbers in a case of an emergency
- Provide assistance in emergencies (medical, fire, hold-up, earthquake, etc)

### ***Receptionists' functions in different organisations***

Here are several examples of different organisations and workplaces that would employ a receptionist and what the receptionist's responsibilities will be in that workplace:

<b>Organisation/ Workplace</b>	<b>Receptionist Responsibilities</b>
<b>Office</b>	In an office environment, a receptionist will handle customer enquiries related to that office's specific type of business. This could include greeting visitors, answering the telephone, taking orders, booking appointments, sending invoices, processing customer payments, organising the printing of marketing materials, organising training courses and conferences, and answering customer questions about products and services.
<b>School/University</b>	A receptionist working for a school or university will handle enquiries from students, the government, parents, administrators, and the Department of Education. They will greet visitors and guests and may also work as a personal assistant to the Principal.
<b>Hospitality</b>	A receptionist employed in the hospitality industry (eg a salon, restaurant or hotel) will provide customer service to guests and customers, by booking appointments, taking reservations, checking in customers, and providing them with refreshments if appropriate.
<b>Medical</b>	A receptionist working for a hospital, doctor's office, dentist's office, or veterinary clinic will file medical records, schedule patient appointments, answer patient questions, help with filing insurance claims, and greet patients.



## Exercise 2

Imagine that you are a receptionist for a local newspaper office. Tick the boxes below to indicate what your responsibilities are likely to be in this position.

Responsibilities	Yes/Likely	No/Unlikely
Write headline stories		
Answer telephone calls from the general public		
Decide which charity the newspaper will raise money for in the coming year		
Open the mail		
Supply refreshments to visitors		
Book appointments and meetings for the Editor		
Clean the office after hours		
Greet visiting journalists and direct them to the person they are meeting with		



## A Receptionist's Role in Providing Customer Service

Customer service is *the action of supplying customers with what they need*.

Some examples of customer service are:

- Answering a customer's query regarding pricing of services
- Referring a customer's telephone call to the marketing team
- Making a customer an appointment with the senior hairdresser



### Exercise 3

Give three more examples of customer service that a receptionist could provide.

1 .....  
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2 .....  
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3 .....  
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However, if an organisation only does the bare minimum in providing a service to a customer it doesn't give the customer any reason to want to go back to that organisation rather than any other.

As the receptionist is in the frontline of the organisation, it is up to you to carry out your services to the best of your ability so that the organisation stands out as special.

A receptionist therefore must not only provide the service, but must (depending on the organisation) look smart (or fashionable), be friendly (or authoritative) and act efficiently to ensure that the customer knows they and their request are valued and taken seriously.

Great customer service helps retain customer trade, so that they return to purchase from the organisation again and again. By earning this return trade the organisation retains business, improves its market position and gains a great reputation which in turn attracts new customers.





## Maintaining quality customer service

When performing the receptionist function, the key to providing great quality customer service is presenting yourself well to customers, enjoying positive interactions with customers and having a detailed knowledge of the organisation.

Presenting yourself well to customers involves showing cultural sensitivity, communicating effectively, expressing empathy, and having a professional image and positive attitude.

Having positive interactions with customers will be helped by the skills of time management, conflict management, maintenance of confidentiality and discretion, respect for people and information, listening and problem solving.

To understand the organisation well, you must learn and remember the organisation's policies and procedures. These will help guide you as to how to answer the telephone, how to transfer calls, what information you can and cannot divulge and to whom, where information on different aspects of the organisation are stored, what to do when certain situations arise (eg earthquake, fire, medical, etc), hours of business, delivery and postal address, etc.

You will also need to know about the products and services the organisation provides. This may involve reading product brochures, learning where the order forms and price lists are, and understanding what the products do and who would use them, if the company provides a service you will need to know what the services are and how they differ from each other.

Knowing the staff of the organisation is important for a receptionist. You will need to know what each staff member does in their job so you can correctly direct customers (external and internal) to the appropriate person. There may be organisational rules as to which staff member deals with certain customer enquiries and you will need to know these and abide by them.

Become familiar with the building the organisation is in, as you may need to explain to a visitor how to get to a certain area. Know where staff are located in the building. Understand the rules and regulations of the various working areas in the building - only authorised personnel may be able to enter, and special equipment may need to be worn in those areas. Learn where visitors can and cannot park, so when a visitor parks in an unauthorised location they can be quickly informed and given the chance to move their vehicle to an appropriate location. You should also have a good knowledge of the local area as you may be required to direct a customer to their next destination after their appointment.

By having a good knowledge of what the organisation is about, its products and services, the roles of staff and its policies and procedures, you will find it easy to help a customer.

### Exercise 4

Write down at least four things that you think a receptionist could do to help retain customer support.

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# Skills and Behaviours of a Receptionist

To be a good receptionist you will need certain skills in order to carry out your responsibilities in a way that promotes the best quality customer service. The skills required to be a receptionist include the following.

- Professional image and attitude – if you look smart, you work smart. Conversely, if you look sloppy, customers may expect to receive a sloppy service.
- Positive attitude – be a ‘solutions person’ rather than a ‘problem person’. If you are enthusiastic, helpful and friendly customers will respond far better than if you are negative. Customers therefore go away better served and with a positive opinion of the organisation.
- Good listening technique – essential for finding out what customers need and therefore how you can help them most efficiently.
- Communication skills in writing and speaking – vital for providing clear, concise, relevant information to customers.
- Ability to find out what people want or need – sometimes customers themselves might not know what information they are lacking. If you use your listening and communication techniques appropriately you can help such customers much more efficiently and quickly.
- Ability to relate to people from different cultures and backgrounds – this is called ‘cultural sensitivity’ and ensures that all customers are treated with appropriate respect.
- Time management skills – you will have to juggle many different tasks – some for yourself, some for others; some will be urgent, some not so time sensitive. Being able to work out what needs to be done and when is a key part of doing your job properly.
- Ability to deal with stressful situations in a calm, efficient manner – because you will deal with many different customers, you can find yourselves in high pressure situations. Dealing with these in the right way can defuse the situation and resolve issues calmly.
- Ability to empathise with people and show understanding – customers (particularly those with complaints) often just want to know that they are being listened to and taken seriously. Being able to empathise and build a bond with customers is a key skill in helping calm customers.
- Conflict management skills – skills such as negotiation and compromise will usually result in a win-win situation for both you and the customer. Lack of these skills can result in a deterioration in the customer-company relationship and loss of trade.
- Ability to manage information confidentially and/or with discretion – you will often have access to vital business knowledge which must not be divulged inappropriately.
- Good knowledge of the company – essential in order to provide information and assistance to customers and answer their queries.
- Problem-solving skills – when you juggle as many tasks as receptionists do, the ability to ‘cut to the quick’ of problems and put-out effective solutions saves time and promotes more efficient, good quality customer service.
- Ability to use appropriate office equipment - eg telephone system, fax machine, voice mail and/or answer machine, photocopier, computer with email, appointment scheduling and word processing applications – you might have to use all or only some of these. Lack of ability to use office equipment appropriately will impact negatively on your ability to provide good customer service as it could result in unanswered phone calls, lost emails, unsent faxes or wrongly booked meetings.

We will look at how these skills and behaviours are actually applied in the job of receptionist later in the Workbook.

### Exercise 5

Match the skill with the responsibility. One has already been done for you.

Skill	Responsibility
Time management skills	Take and relay messages to staff accurately
Good listening technique, and communication skills in writing and speaking	Calm a frustrated customer
Able to operate a computer using various applications	Juggle different daily tasks, eg urgent typing for this afternoon's meeting, photocopying for routine monthly filing, and responding to emails and phone calls.
Conflict management skills	Provide routine clerical and word processing services, eg type documents, send emails, make appointments, etc
Empathy, attitude and communication skills	Negotiate a solution to a customer complaint

Sample Document

## **A Receptionist's Skills and Behaviours**

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### **Learning Outcomes**

*At the end of this section you should be able to identify and explain the following skills and behaviours -*

- ☐ A professional image and a positive attitude
- ☐ Showing empathy and cultural sensitivity
- ☐ Verbal and non-verbal communication skills
- ☐ Conflict management
- ☐ Discretion and confidentiality
- ☐ Ascertaining customer requirements
- ☐ Time management
- ☐ Problem solving

# Professional Image

The main role of a receptionist is to meet and speak to clients, customers or visitors, either face-to-face or on the telephone. How customers are treated by the first person that they meet in an organisation determines their first impression of that organisation and helps them decide whether they want to take their business there. Their first impression will be hard to shake off. If they get a bad first impression, they may simply go elsewhere and not bother with the organisation at all.

This is why it is of great importance when meeting or speaking to customers to look, sound and act the part. We may not like to be judged on how we look, but it's all part of making customers feel that our organisation cares about them and the impression it makes.

## Not convinced that these things matter?

Consider the following scenarios.



You go into a hairdressers and the lady on the left offers to cut your hair. What do you do?

**OUTCOME:** You don't want hair like that, so you apologise and walk further along the street.

You go to the local solicitor's firm for help, and the gentleman on the right is at reception. What do you do?

**OUTCOME:** You don't want to deal with a firm that has such bad-tempered people, so you have a look in the Yellow Pages to find another firm.



If we pay attention to our personal presentation, it sends a message to clients that we care about ourselves and about the way others perceive us. This implies that we also care about the service we offer and the way we perform it. If we *look* presentable, clients will immediately have a better opinion of our organisation and how it will do its job.

There are three key aspects to portraying a professional image:

- hygiene
- what you wear (dress codes)
- the standard of your clothing (grooming)

These are all outward signs to customers about your ability to do your job.

## Personal hygiene

Personal hygiene is important in all industries. Would you like a dentist who had bad breath leaning over you to inspect your teeth? Examples of workplaces where cleanliness is particularly essential to good customer satisfaction are: hairdressing salons, make-up shops, hotels, nurses and doctors, etc.

### Example

Two customers visit a sandwich shop.

The first, Cheryl, is served by a sweaty man with dirt under his fingernails. He doesn't have an apron on and before he cuts the bread he rubs the knife on the back of his dirty jeans. He scratches inside his ears and Cheryl is sure that she even sees him pick his nose. The sandwich looks fine but Cheryl feels rather nauseous as she eats it, and puts it in the bin half eaten back at the office.

The second, Chris, is served by a lady wearing clean overalls and a hair net. She washes her hands before serving Chris and selects a clean knife before cutting the bread. Chris thoroughly enjoys his sandwich and becomes a regular customer.

How would you rate Cheryl's customer satisfaction after her visit? Explain why.

How would you rate Chris's? Explain why.

*Being clean and fresh contributes to customer satisfaction. If personal hygiene is lacking, customers won't want to return even if the service was otherwise of an acceptable standard.*

### Exercise 6

Write down two workplaces where customer satisfaction would be greatly affected by personal hygiene standards. Explain why.

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## Dress codes

The type of clothes you will be expected to wear as a receptionist will depend on *where* you work. Different organisations will want to portray different images – a hairdressers may wish to be seen as cool and modern; a law firm may wish to be seen as long-standing, dependable and reliable. As you are the first person a customer sees, you play a big part in portraying that image.

You may need to develop a separate work wardrobe as the clothes you wear during your time off may not be appropriate as work wear. We all have favourite clothes and ways to style our hair. However, when we enter the workplace we must bear in mind that what we *like* is not necessarily *appropriate* for where we work.

A basic mistake that many new receptionists make is underdressing for their position. If you are unsure of the attire required for your organisation, it is best to dress as smartly as possible.

The best rule of thumb when it comes to dressing professionally as a receptionist is to dress *how you want to be seen*. If you want to be seen as a business-like professional, then dress accordingly!

### Here are a few dress code guidelines for male receptionists:

- A button-down shirt in white or a neutral colour
- Polished black shoes
- Black, grey, or blue jacket
- Matching trousers
- Conservative tie in a neutral colour
- Black socks



### Here are some dress code guidelines for female receptionists:

- Trouser or skirt suit (a skirt that reaches the knee) or separates
- Basic jewellery
- Modest makeup
- Small heels or flats
- Plain coloured tights



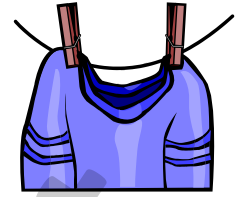
### General guidelines when starting work as a receptionist:

- **When in doubt, it is best to overdress.** If you are starting a new job and are not sure of the dress code, it is always best to overdress instead of underdress. This way, your new employer will understand that you take your job seriously.
- **Copy other employees in the office.** If you want to eventually receive a promotion and become a senior executive assistant, then emulate the employees that you hope to be like.
- **Wear clothes that fit you appropriately.** It is important that your clothing is not too loose or too tight, but that it fits just right.
- **Stay up-to-date with fashion.** There is no reason to follow every trend when it comes to work attire, but very obviously outdated clothing will not convey the smart image that is required. A good suit will normally last some years, but it is important to periodically update your wardrobe so that you appear current and relevant in the workplace.
- **Wear conservative colours.** The safest colours in the workplace for men and women are navy, dark grey, and black. If you want to have some fun, you could wear a bright accent, like a pink tie or a purple shirt, but it's wise first to observe other employees before wearing this type of clothing.



## Grooming

One thing is certain, no matter whom you deal with – and whatever you are wearing - you must always look clean and tidy. This does not mean that you need to wear expensive clothing, but your clothing must be washed, ironed, and professionally presented.



Even if your office encourages a casual environment, that doesn't mean that your clothing should be sloppy. There is no excuse for missing buttons, stained collars, or dandruff flecks on your shoulders.

Rightly or wrongly, clients may think that if we look scruffy we take a lackadaisical attitude to our work and may make careless mistakes.

### Checklist

Look at what you are wearing today and mark Yes or No in the checklist below.

	Yes	No
Does your shirt/blouse have a clean collar and cuffs?		
Do you have stray hairs or dandruff flecks on your shoulders?		
Is your outfit ironed?		
Is your entire outfit clean?		
Are your shoes clean?		
Are the heels scuffed?		
Do they smell okay?		
Do your feet smell okay?		
Any runs in your tights?		
Any buttons missing?		

If you ticked any of the shaded boxes, make sure you smarten up for tomorrow!