

A Customizable Front Desk Resource Manual

A detailed review of the tasks that are to be fulfilled by a front desk employee. Everything you need to train and continue professional development for the front desk staff, from etiquette and organization tips, to a checklist and worksheet templates.

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An Introduction

As an office manager, you'll want your front desk staff to be organized and focused on daily, weekly, and monthly goals. To make that happen, management should provide employees with clear guidelines and helpful checklists. We've created a fully customizable manual for your use at the office to make things easier.

This guide includes a detailed review of the tasks that are to be fulfilled by a front desk employee. You'll find everything you need to train (and continue professional development) for the front desk staff, from etiquette and organization tips, to a checklist and worksheet templates.

What can the Front Desk Resource Manual help you with?

- *New Hire Trainings*
- *Staff Development Meetings*
- *Gaining Efficient Front Desk Employees*



Front Desk Duties

A Primer

Front desk administrators are essential to any business. These professionals are often the first impression that anyone has of a business, whether it's a college mailroom, a doctor's office, or other institution. In addition to that, they are the person that everyone goes to when they have a question and continually keep the office in check. Truly, what don't they do?

When you take a position as a front desk clerk, it's important that you can work well under pressure while maintaining a consistently pleasant and professional demeanor when communicating with the public. Understanding your duties, and how they affect the day-to-day of the office's dynamic, will make your work decisions smarter and more effective.

Remember this: Do not minimize the impact that you and your job performance have on visitors and other employees. Your job is exceptionally important.

Ready to dive into it?

Section

Main Duties

Greeting Visitors and Helping Them Find Their Way

Again, the most important duty on your list is customer service. When a guest arrives you should:

- Greet them warmly.
- Help them with their needs; offer them your help immediately.
- Provide knowledgeable answers to any questions they may have about the business' operations.

In addition to in-person greetings, a front desk receptionist is responsible for answering all incoming calls politely and efficiently. Depending on the size of the office, you may have to deal with a sophisticated telephone system that receives multiple calls at once.

It's advised that you ask your supervisor for a cheat sheet with important extensions and phone numbers (refer to our Checklist section for a template). Having these numbers close by will eliminate wasted time, allowing you to go through different calls quicker. Having a pen and paper nearby will also be helpful when taking messages.

Distributing and Preparing Mail

As a front office receptionist, you may have to oversee the distribution of incoming and outgoing mail. In the case of incoming mail, you should:

- Sign for priority or overnight packages as they arrive.
- Eliminate junk mail immediately and then identify mail of the highest priority.
- If applicable, first process incoming mail; enter or scan mail information into the computer (if there is a log or application in use, ask for instructions).
- Hand-deliver each piece directly to its respective recipient or place the parcels in an appropriate interoffice mail slot.

In the case of outgoing mail, you should:

- Prepare outgoing mail for pickup by the postal service or overnight courier.
- Weigh each letter and package using a postal scale and apply the proper amount of postage to each envelope/package, if needed.
- Regularly check the mailroom supplies to maintain a full stock on-hand. Order new supplies as needed.

In the case of outgoing packages, you should:

- Place each type of package in the designated area. UPS, Mail, and FedEx should each have their own “place”. If a package accidentally goes out with the wrong carrier it is often never recovered.
- Scan or write the tracking numbers of out-going packages in a log so you know what you have taken responsibility for and what you haven’t.
- Make urgent delivery arrangements if someone in the office needs to mail documents in a rush.

Administrative Duties

As a front desk clerk, you may be asked to take care of other miscellaneous, but very important tasks.

These may include the following:

- Prepare financial spreadsheets and create presentations.
- Manage the calendars of senior team members and organize necessary business travel arrangements.
- Order office supplies.
- File documents.
- Make photocopies and maintain working knowledge of the copy machine.
- Send and receive faxes.
- Perform bookkeeping tasks.

Front Desk Etiquette

Phone Conversations

A front office receptionist should respond quickly to phone calls and answer callers with enthusiasm in a professional manner.

As a receptionist, you should always:

- Display professional behavior, which means avoiding things like chewing gum or eating during phone calls.
- Attend to the caller right away without putting them on hold.
- Be thorough and attentive to the caller's needs even in hectic times.
- Keep personal conversations to a minimum.

Even over the phone, people can hear you when you smile. Smiling when you answer the phone helps to set the tone of the call and helps to calm angry callers.

Please answer the phone using the following method:

1. [SMILE]
2. "Thank you for calling the front desk, YOUR NAME speaking."
3. "How may I help you?"

Appearance

A front office receptionist should always look his/her best. You are, in fact, the first person a guest interacts with.

Personal hygiene must be well attended to, attire should remain professional, and overall grooming should be neat and orderly at all times.

**Company Dress Code should be well-defined and communicated.*

Customer Relations

Not matter what industry you are in, you'll always encounter angry customers. It's imperative that you master the act of handling unhappy visitors.

A few pointers for dealing with disgruntled customers:

- Don't take it personally! They are probably not mad at you, so do not try to defend yourself. Start by just listening to their whole story while acknowledging them quietly.
- When the customer is at the peak of expressing anger, sorrow, or distress, show concern for them silently.
- In this battle, you and the customer are on one side and the problem is on the other. Work together to solve the issue.
- If you encounter a loud and abusive customer, respond by speaking softly and with a very steady tone.
- Make sure that you are addressing the technical, administrative, and emotional aspects of the customer's concerns.
- It does not matter who created the problem or what transpired before the customer got to you. Tell the customer that you'll resolve their problem and will apply your personal effort to achieve results.
- Always remember that you can speak to a manager if things start to feel out of hand.
- If you ever, ever feel threatened with bodily harm, walk away immediately. Do not be afraid to call for help.



The Importance of Checklists

As a receptionist, the reception area is your responsibility from the minute you get to work. Everything from cleaning to organizing and dealing with visitors is your shared responsibility with other fellow front desk clerks.

No matter how long you've been doing your job, it's always good to have a checklist you can follow for each and every one of your responsibilities. The more organized you are, the better.

Having such lists is also a great help if someone is covering your shift. It'll ensure that all tasks are carried out properly without having to worry about duplication.

In this next section, you'll find checklists and templates that you can customize as needed.

A Daily Checklist for Receptionists*

	MORNING SHIFT	EVENING SHIFT
Everyday	<input type="checkbox"/> Check phones for pending messages. <input type="checkbox"/> Pass on any relevant messages. <input type="checkbox"/> Check fax machines and distribute any pending faxes. <input type="checkbox"/> Ensure that visitor book is ready to use. <input type="checkbox"/> Receive and distribute mail. <input type="checkbox"/> Prepare outgoing mail. <input type="checkbox"/> Ensure that reception room is tidy. <input type="checkbox"/> Turn reception computers on. <input type="checkbox"/> Go through the daily cleaning checklist before clocking out.	<input type="checkbox"/> Turn on the answering machine before leaving the office. <input type="checkbox"/> Fill up paper trays on fax and printer machines. <input type="checkbox"/> Put visitors book away. <input type="checkbox"/> Ensure that all visitor information is put away securely. <input type="checkbox"/> Ensure that you leave the reception area tidy. <input type="checkbox"/> Turn reception computers off. <input type="checkbox"/> Empty all garbage bins in reception area and review the daily cleaning checklist before closing the office.
Mon/ Thu	<input type="checkbox"/> Get confidential waste ready for collection at _____.	
Friday	<input type="checkbox"/> Organize and develop additional to-do lists for the following week.	<input type="checkbox"/> Refer to the cleaning checklist to complete remaining cleaning duties.
When Used	<input type="checkbox"/> Tidy up the conference room.	<input type="checkbox"/> Tidy up the conference room.

*Customize if necessary

Housekeeping Checklists

Daily Cleaning Checklist

Daily cleaning lists will address communal areas of an office: the reception or lobby areas and workspaces (offices or cubicles).

- Empty waste bins, wash as needed and add new liners
- Use standard glass cleaner to wipe down all glass areas
- Damp-wipe hard surfaces with mild disinfectant
- Clean walls and painted surfaces as needed
- Wipe down door handles, light switches, and baseboards

Weekly Cleaning Checklist

A weekly cleaning list will ensure a more thorough cleaning of all communal areas in the office. Getting this done on a weekly basis will create a healthier work environment for employees and guests of the office.

- Vacuum and mop all floor areas
- Clean glass windows inside and out
- Throw out old foods in the communal refrigerator, and then clean and disinfect.
- Empty and disinfect all trash receptacles and add new liners

Monthly Cleaning Checklist

Monthly checklists only address items that will not endanger the health or safety of the office population if not cleaned on a daily or weekly basis.

- Vacuum all fabric chairs (clean as needed)
- Vacuum all vents
- Dust all high surfaces

Professional Email Responses

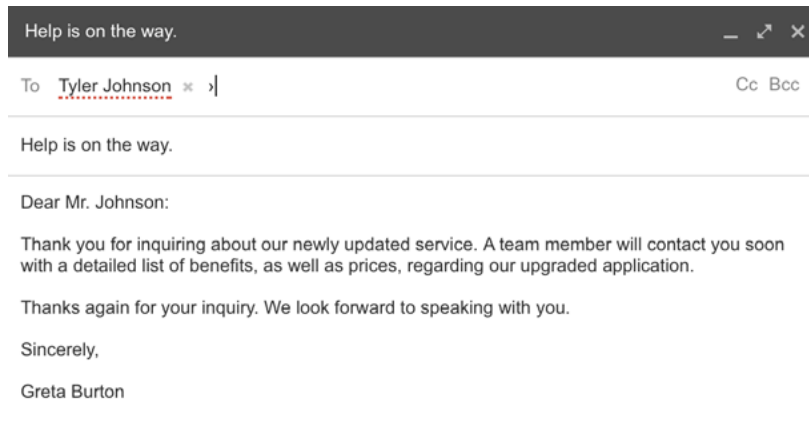
A Quick Overview

There are different ways to respond to emails professionally, depending on your intention with the email. Emailing for acknowledgment requires very succinct responses, but most other circumstances will require carefully crafted answers.

Also, always acknowledge the emails you receive, even if you cannot fully reply within 24 hours of receiving them. Let the customer or coworker know that you are on top of it and will get back to them as soon as possible.

A very important last tip: Never forget to spell check and double-check for grammar mistakes!

Examples



Help is on the way.

To Tyler Johnson x | Cc Bcc

Help is on the way.

Dear Mr. Johnson:

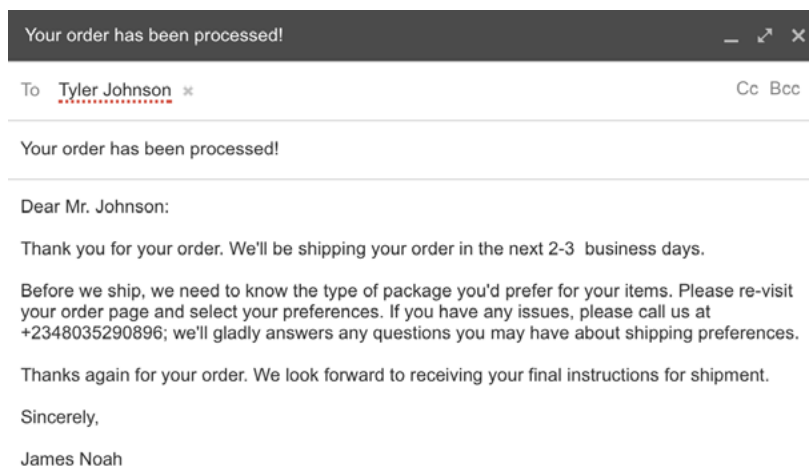
Thank you for inquiring about our newly updated service. A team member will contact you soon with a detailed list of benefits, as well as prices, regarding our upgraded application.

Thanks again for your inquiry. We look forward to speaking with you.

Sincerely,

Greta Burton

A simple acknowledgement



Your order has been processed!

To Tyler Johnson x | Cc Bcc

Your order has been processed!

Dear Mr. Johnson:

Thank you for your order. We'll be shipping your order in the next 2-3 business days.

Before we ship, we need to know the type of package you'd prefer for your items. Please re-visit your order page and select your preferences. If you have any issues, please call us at +2348035290896; we'll gladly answers any questions you may have about shipping preferences.

Thanks again for your order. We look forward to receiving your final instructions for shipment.

Sincerely,

James Noah

A more detailed response

Best Practices: How to Handle Visitors

Have the reception team discuss the most frequently asked questions (as asked by office visitors) and, together, come up with the best answers.

Use your responses as a guideline when on the phone or answering emails; that way, everyone is on the same page.

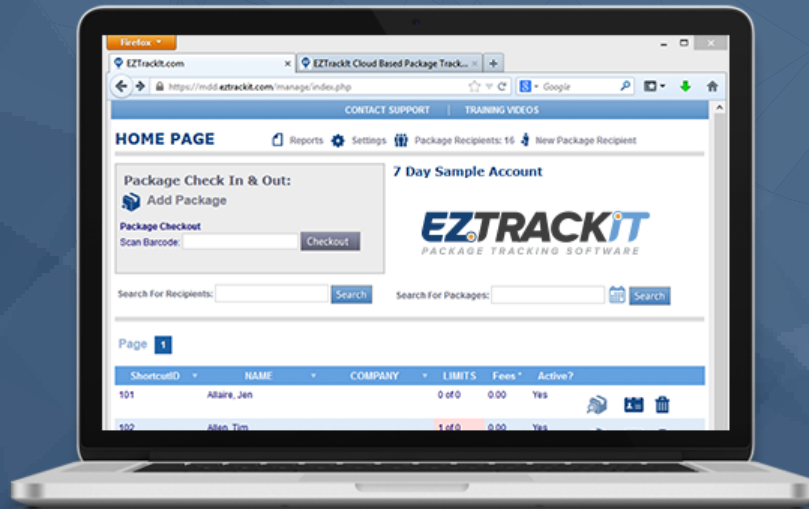
Sample Question	Sample Answer

Important Numbers and Extensions: A Reference Sheet

Name	Title / Office	Phone #/ Ext. #

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