Front Desk Management Key Terms

Term	Definition	Introduced In
Active listening	A communication technique where the listener is engaged and entirely focused on the speaker	Module 3
Customer service	Support offered to individuals that use a company's products and/or services	Module 2
Drag task	A priority category that is low benefit and high effort	Module 4
Fill-in	A priority category that is low benefit and low effort	Module 4
Major task	A priority category that is high benefit and high effort	Module 4
Priority categories	Are a means to prioritize tasks based on the amount of effort required and benefit provided	Module 4
Quick win	A priority category that is high benefit and low effort	Module 4
Stress management	A technique or multiple techniques used to minimize an individual's level of stress	Module 5
Time management	The practice of prioritizing by examining time/resources to plan for a specific task or project	Module 4

MANAGING FRONT DESK
MODULE ONE – FIRST IMPRESSIONS

Male: Module One – First Impressions. What we're going to discuss today in module one is how the front desk, how your reception area and the person working behind that desk, makes a first impression on those visitors coming to your office, and what it is about this first impression that makes it so important for us to make sure it's a positive one. And to discuss that, let's first talk about why it's so important that first impressions are made in a positive way. Studies have been done time and time again. One of the ones that really amazed me is the analysis they've done about communications. And what they're saying is that 93 percent of our communication is nonverbal. Only 7 percent is verbal. And why this is so important is when people walk into your office, before words are ever said, there is so much that they are seeing that is nonverbal, obviously, and they are making decisions or judgments about. So when we talk about communication from one person to another, we talk about how the words only account for 7 percent, and then usually it's the body language that make up the next 93 percent – really the body language and the tone, all right? But when we talk about the front desk, there's more to it than that because we haven't even gotten to the point yet where we speak to the person. They're just walking into our office space. And they are looking at everything. So when we talk about, in this first module, is not just about the receptionist or the person working behind the front desk. We're also talking about the entire environment. So today in module one, we're going to take a look at how does the receptionist or the person behind that front desk – how do they make a positive first impression, but also how does your office area, your reception area – how do we use that to make a positive first impression? Let's talk first about our receptionist. So the first thing we want to discuss is their attire – the way they dress. And why is that important? Because as I'm walking up to that desk, I'm looking at that person. And the first thing that I'm going to make a judgment on is their appearance. And now what you wear – we'll start with our attire, our clothing – is going to say something. That's going to be the common theme through this whole first module, and maybe through this entire webinar, is what are we saying? What are we conveying by the way we conduct ourselves? First we're talking about attire. What is our dress saying to the person? And this is why the policies of the corporation of your company about how people dress are important. A lot of people will say, "Well what does it matter whether or not I wear a business suit or I wear a pair of jeans and a tee-shirt as long as I'm getting my work done? What does it matter?" Well, this is one of the areas where do does matter, and I can tell you there are other areas that it matters as well, but we're not going to get there for now. We're going to stay focused here on our front desk, our receptionist. And if I walk in and I see that person in business attire, it says something. If I walk in and they're literally in jeans and a tee-shirt and a pair of sneakers, that's saying something as well. Is one more positive than the other? No. It depends on what message you want to send. So if you want to send a message – a very corporate, very structured, like a law firm, like a financial firm, a bank – you want business attire. But now if you want to convey something to the other extreme, maybe similar to a Silicon Valley software development company, you may want them in jeans and a tee-shirt because that has become accepted – not really accepted - expected. Because it allows them to become innovative and think. Those are the kind of things that we make judgments on. So what that person is wearing has a lot to do with what you're saying. So dressing appropriately – one of the things I find amazing, or I shouldn't say amazing. Frustrating – is you have a policy of business attire, and gentlemen will wear a button-down shirt with a tie. But then that tie will be undone and the top button will be undone. Well, what's the point? Now you just made yourself look messy. And that conveys something. That says something. It says something about you and it says something about the company that you're sitting there at the front desk in a business suit with your top button undone and your tie down. The question is, what it's saying, is that what you want it to say? Grooming as well – your hair is important, your makeup for women - and for anybody, piercings, whether they be ear piercings or nose piercings or anything else like that, it all says something. And what do you want to convey? You need to think about all of this and ask yourself, "What is it saying?" For me to make a positive first impression, what must I be doing to really make that positive first impression? But to say it's a positive first impression first makes us ask the question, what makes it positive? Do we want to convey casual, relaxed, innovative? Or do we want to convey structured, powerful, business-like? Moving now, our body language. Our body language, again going back to verbal, there's nonverbal communication. Our body language is saying so much more than the words coming out of our mouth will ever say. And when I'm walking up to that front desk, what is your posture? Are you sitting straight up? Are you focused? Or are you slouching down, leaning over, hunched back, laying back in your chair like you're ready to take a nap? What is your body language conveying? The next thing is, as the person is walking into your office, do you turn and make eye contact? And you should, because making eye contact is saying to them, without saying a word you're saying to them, "I want to hear what you need. I'm here to help you." By making eye contact, that's what you're doing. So many people don't bother with eye contact. They never pull their eyes off their computer screen or the papers on their desk to look up and see you and look you in the eyes and say, "How may I help you?" Because honestly, you don't even need to say those words. All you need to do is establish eye contact, and the person knows that you are basically saying, "How can I help you?" It makes them feel valued. And also, relax. Don't fidget. If you're nervous and you're fidgeting with things, it distracts people. It takes the focus away. Also, be relaxed. I'm not saying be strict and rigid. I'm just saying make sure everything is in line, because that person walking in is making a judgment about this for your organization based on just a few seconds' worth of time with you. And don't forget to smile. Nothing really changes the mood than a smile, especially if you have an irate customer or an irate person coming in. Just smiling has a tendency to disarm them quite a bit. You make eye contact, and you smile. It changes people's demeanor. It changes people's attitudes. And then your attitude. I like the phrase "attitudes are catchy." Is your attitude worth catching? It really is very important. If you have a positive attitude, if you're confident, if you give off that feeling, they're going to sense it. If you're in a good mood, they're going to be disarmed, especially if they're in a bad mood. The next one is be yourself. There's nothing worse than people who are disingenuous. When you're not genuine, when you are faking it, people know. They can sense it. How many of you called like a customer support line or a customer service line, and they say "thank you" 18 times within the first ten seconds of conversation? And I'm not saying they're disingenuine, but I'm saying it makes me question it, because I'm pretty sure they're reading off a script and they're being told what to say. And that's somewhat of a problem, because that's the impression you're giving off now – that you are not genuine about what you're saying or what you're trying to do for them, but that somebody has scripted it out for you. And therefore, you're not genuine about what you're doing. There's a big benefit to just being yourself and being genuine. Now, that all starts with you wanting to do good customer service. That starts with you wanting to make a good first impression. So if you don't have that, then you have no choice but to fake it. But it is a far better impression on people coming in if you are genuine about your interest in what's going on. The last but not least is remember names, and repeat names. When someone comes into your office, and they say, "Hi, my name is John. I'd like to see so-and-so," well, you have to remember their name because now you have to call so-and-so and let them know that John is here. But beyond that, if they walk in and say, "Hi, my name is John. I have blah blah...," and they keep going, when you respond, you really should try to respond with, "John, thank you so much for coming in. Blah, blah, blah." Point is, use their name back. So again, five keys – your attire; your body language; your attitude; be genuine, be yourself; and remember people's names. Now the next thing I want to talk about is the three keys to your office making a positive first impression. So we talked about the receptionist, the front desk person, and what they should do to make a good solid first impression. Let's take a quick look at a few things that you may want to consider in your organization. Your reception area – is the layout inviting? Is the receptionist desk, is the front desk in the middle of your reception area? Is it pushed off to the side? Is it almost hidden? Is it a nice desk? Is it just a chair with a folding table? I know those are kind of extremes, but what are you saying? When people walk in and they look at your office space, they're making an impression. Do they care about their organization? The chairs that you sit in, are they circled around a little coffee table? Or are they pushed up against the wall so that everybody's sort of isolated? The decoration – is your office decorated? Do you have pictures on the wall? Whether they be motivational type posters, whether they be show posters, whether they be just general artwork – all of these things – the layout, the decorating, the furniture, the walls – they're all conveying a message to the person walking into your office. And the last is literature. What do I mean by that? What's on your coffee table? What magazines are on that table? Because they, again, by themselves they say something. And depending on your organization, that literature, depending on your organization, should change. If you're into the performing arts, what is on that coffee table is going to be completely different than if our a law firm or a financial firm or a marketing firm. So I want you to think about all of that, is that when looking at your office space, what are you saying again? What does the layout say? Do we encourage people to collaborate and talk and have a comfortable environment? Or am I laying out – do I have a layout that isolates people? My decorating, is it warm and inviting? Or is it cold and basic? And what literature is on my tables?

[End of recording.]

Male: So let's take a look at what contributes to customer service and high quality customer service. The three components here is professional behavior, problem solving, and follow-through. If you perform in a professional way, if you really work to solve the customer's problem, if that's what they have, and if you really do follow through on the commitments you make, you will develop and deliver exceptional customer service. So let's discuss these things in a little bit more detail, specifically, professional behavior. We've all heard the term, "You're a professional. Act like it." They have a professional demeanor. I think we all have sort of our own preconceived notions or our own thought process as to what professional behavior means. And that's going to change from organization to organization, person to person. And that's fine. It's a very subjective term here. But let's throw some specifics in there for us to think about to help us understand how we would deliver a professional behavior. The first one I want to talk about is something that I think is very challenging in our society today, which is be attentive. Focus on the task at hand. With the unbelievable amount of stimuli that is out there hitting us today in the environment we have with our cell phones and our Internet access, it is very, very difficult if not almost downright impossible sometimes, to stay focused on your task at hand. But a professional – a successful professional trying to deliver customer service needs to be attentive and focused on that customer that they're working with at that moment. They need to ignore that when they bring up their web browser, the CNN that pops up with all the news stories around the world. They need to avoid – and this is probably the hardest – is your cell phone. Your cell phone with the phone calls, text messages, Facebook posts, emails, Tweets – that device is always buzzing. Some people, it never seems to ever stop for. How can you focus on your task at hand? How can you focus on that customer if you're constantly turning around or looking down or being distracted by the fact that your phone is always going off with one of these many different distractions? Now to that point of being attentive, when the phone rings, we need to have a goal of answering it within three rings. And depending on your organization, depending on your structure, that may or may not be feasible. But it should be a goal. It should be a goal to answer that phone within three rings because it says that that call coming in is important enough – not that I'm going to ignore it till the last second, not that I'm focused on something else, but the phone rang. That's my focus. I pick it up and I answer it within three rings. After the fourth or fifth ring, you start to ask either A, is somebody either on the other side, or do they even care if the phone gets answered? Now, so that should be your goal. Now along with that, I know most organizations, or many organizations, have automation for dealing with their phone calls. And we really need to look at minimizing it. Some would say get rid of it altogether. It's good in theory, but a lot of us economically can't really do that. The question, though, is how do we balance the two? How do we minimize the use of automation, especially as it relates to being professional? And the way I would advocate is this – if you have customers, if you have vendors, if you have people calling into your organization and they know your organization, and they know who they want to speak to, that's where you use your automation. Give them the ability to go straight to the person they want to talk to without having to talk to an operator. Most people accept that. That's a standard thing. What we should try to minimize, though, is that long list of options. So if I know about your organization, I want to go straight to that person, I can make that happen. If I don't know anything about your organization, that's where I have a tendency to get into these automated menus, and if you're this, press that. If you think you want this, press this. And it's frustrating for the person on the other side of the phone. If there's any way you can pop that person back out, send them to the receptionist, allow the receptionist to make your first impression being a human being and not an automated device. Going back to our module one and first impressions, think about the first impression it makes to have a new person calling your organization looking for help and getting nothing but a sea of menu prompts. Now look at the other side of that and look at it as if somebody doesn't know who to talk to and they need some help, and they call in and they get a very nice, helpful receptionist who then is able to listen to what they need and direct them appropriately to the right department. Think about the difference in those two options. Now we can get into a whole bunch of other things, but we do have a limited amount of time today. And unfortunately, I'm going to go to the unprofessional behavior because sometimes we can learn as much about what not to do as what to do. So let's take a look at some of the unprofessional behaviors that you should avoid. Arguing with coworkers in an open area – very unprofessional, especially if you're doing it at the front desk. It's an open area. You may have customers, vendors, visitors in that room, and now again, you are giving off a very, very disturbing first impression. Any kind of argument or disagreement should be done behind closed doors. Inappropriate jokes or comments. Be careful what you say, especially up at that front desk. Your buddy walks in, a friend of yours, a coworker stops by the front desk and you just have a little chitchat. It's just between the two of you, but others are within earshot, especially at that front desk. What you say, what you joke about can have a really negative impact on how people see you and the organization. I would also encourage you to avoid raising your voice. The most common reason to raise your voice is in anger. So therefore, absolutely don't do it. But also, someone's walking down the hall, it's really not a good idea to just scream out, "Hey, Susie, come back!" It's really inappropriate. It's really unprofessional. You really should try to maintain a reasonable voice level. Okay, beyond – the next thing is problem solving. We need to solve problems for our customers. And it's not always about solving problems, but we'll talk about that in a second. Let's talk about solving a problem. People call in with a problem.

The first and foremost thing that you need to do is listen. I know, that sounds obvious. You know what? It sounds obvious, but most of us don't. They say three or four words, maybe a sentence or two, and we jump to conclusions. Listen to them. Let them finish. You need to identify really what the issue is. So by listening to them, letting them speak, letting them explain what's going on, throwing in a couple of key open-ended questions so that they can expand on their issue. That way, you can correctly identify the problem, because that's where it all starts. If you identify the problem correctly, everything else doesn't matter. Everything else will be wrong. So you need to start by identifying the real core problem. A lot of times people call in and they think the problem is one thing, but when you really listen to them and when you really poke and prod with open ended questions, you find out that the problem is different than they thought. Then you need to analyze that problem, figure out what the background is, where it came from, why it happened, and then you need to identify some decision criteria. What do I mean by decision criteria? When I talk to people about project management, we always talk about the barriers. We always talk about the constraints of project management. The constraints of a project are typically time, money, and performance – performance being things to function the way they were supposed to. So when I talk in project management, we talk about identifying the high priority of those three items, because when something goes wrong in the project and you need to correct, you either need to figure out that you can lower your performance, meaning not deliver on everything; you can spend more money; or you can extend the project out. So you have these options, and developing solutions starts with identifying the decision criteria. Now I know what my priorities for my decision criteria are. Now I can develop multiple solutions, and I emphasize multiple solutions. Developing a single solution and enacting it may mean you left out what might be the better solution. So I strongly encourage you when you're doing problem solving, don't look for just one solution. Identify two or three and then pick the one that's optimal. Which one is optimal? Well, based on the decision criteria that we identified, we look at the different solution options we have and pick the one that matches best. So that's how we handle problem solving. That's the structure. Now I want to talk a little bit about dealing with complaints. Now, complaints can be problems. So the first thing we're going to do when someone calls in to complain is listen, because if there is a problem, then I'm going to follow the procedure we just talked about – identifying the problem, analyzing it, identifying decision criteria, developing solutions, and then picking a solution. But what if there is no problem? What if there is a problem, but there's nothing you can do about it? There's no problem to solve. It's just something that happened. Then what you need to really do is acknowledge that it happened. In a lot of ways, sympathize or empathize with the person, apologize for it, and just try to diffuse the situation. And a big no-no after the apology is to then start defending yourself or defending the organization. Something went wrong. The customer's unhappy. Acknowledge it. Sympathize, apologize for it, and diffuse the situation. If you start trying to defend, "Well, I'm sorry that happened, but it was because … I'm sorry that happened, but the store should have … I'm sorry that happened, but you know, you could have ..." See, all of those are I apologized, but now I'm going to defend myself. And what happens when you start defending yourself? Now the person on the other end feels like they need to defend their position. Now you've created a very difficult situation even more difficult, because now the two of you become adversaries. Rather than trying to diffuse it, rather than trying to calm them down, you have now thrown gasoline on a fire. So you've got to be aware of that. Don't get in defense mode. If there's no value to defending the position, then your best bet is not to defend it, but just calm the whole situation down. It will benefit you more long term than it would be to try to defend the situation and end up in a much more difficult situation. And the last item is follow-through. Whatever comes out of the beginning, the first few parts, especially the problem solving, you need to follow through on it. Identifying a problem, coming up with solutions – none of it matters if you don't follow through on the execution. Now follow through, if you have a problem, follow-through is obvious. You've got to put the solution into place and make sure it works, make sure it makes the customer happy. Well, what if it's just a complaint? Even then, you may want to do follow-through. You may want to take that extra step and call them. Maybe it's just an extra phone call or two to make sure it didn't happen again, or to make sure that whatever the problem was is not still an issue. So sometimes follow-through is just an extra phone call or two to make sure everything is good. The other part is, follow-through, if you have the ability, throw something in – a discount, a gift certificate – something. And I always think about Disney when I talk about this because Disney empowers their employees to make the customer happy. They need to have a magical experience. And if that means a customer's upset and the employee, then, needs to actually spend a little bit of money, whether it be to send flowers to their room or to personally hand carry their bags over to their room, or a discount for lunch – anything, they empower their employees to be able to do that. So if your company has empowered you to do that, use it. Use it to take a customer who had nothing more than a complaint, and use that to try and, again, diffuse the situation and put them, get them to see you and your organization in a more positive light.

[End of recording.]

Male: Module Three – Communications. Now let's start off by taking a look at the different forms of communications. We talked about this a little bit earlier in the first module, and we're going to expand upon it now. Now, there are basically three different forms of communication. Some would argue two, but I wanted to break it up into three, and I'll explain why as I go along. First of all, the first one, the largest one, is non-verbal communication, otherwise known as body language, okay? What you're saying with the way you hold your body, the way your hands move, the way your head is positioned, where your eyes are focused – all of those different things contribute to what we're saying with our body. Now another form of nonverbal communication is your tone. Now I know some people would disagree and say, "Well the tone of how you say a word is verbal." It's not really. When we talk about verbal, we're talking about written words or spoken words – the actual words themselves. So the nonverbal tone is just the inflections that I put on the words, just like how I would move my hands or my body as I'm speaking. And then verbal, which are the spoken words, or if you're doing email or texting, the written word – the actual word that you use themselves. Now if you look at this breakdown, the actual words are only 7 percent of our forms of communication, meaning when I talk to somebody, only 7 percent of what I understand from their saying are the actual words themselves. The tone accounts for 28 percent. And the nonverbal body language is 65 percent, which equates to 93 percent being nonverbal and only 7 percent being verbal. If anybody has encountered this, and I'm willing to bet probably 100 percent of you out there have – having difficulty communicating appropriately in an email, or even worse, in a text message. It is very difficult for us to communicate using only 7 percent of our ability to communicate. Now let's look at the different ways we communicate. Obviously face to face. We have access to 100 percent of the forms of communication. When we talk on the phone, we limit ourselves to now only 35 percent of our ability to communicate. 35 percent of the forms of communication are available to us - the words and the tones, which makes it harder. They don't see your body language. If anybody's ever done negotiation, you'll know it is very difficult to read somebody just based on their words and their tone. And then if you move on to email and texting, now you've gone from 100 percent to 35 percent to only 7 percent. And I really want to let that sink in for a second as to how hard it is to communicate appropriately via those electronic methods, and therefore why it is so important to be careful when we communicate with email and texting, because we lose 93 percent of our ability to communicate what we really want to say. So as we sit at that front desk, as I talked about earlier with first impressions, your body language, how you're sitting, whether you're upright, slouched – it's saying something. That's 65 percent of your communication. They haven't even opened their mouths and 65 percent of what you're trying to say to them is already being said. So look at our different forms of communication just to rehash it a bit. Face to face, we have 100 percent of our ability to communicate. On the phone, we limit that down to 35 percent of our ability to communicate. And on email and texting, we limit it all the way down to only 7 percent. Kind of amazing, isn't it? Okay, now let's move on to a very important part of communication, which is listening. What we just talked about is expressing ourselves – or at least that's my focus, was more on expressing ourselves. Now when we listen, we're using everything I just discussed. When we listen to somebody, it's not just about their words. As I just mentioned, it's about their words, their tone, and their body language. And their body language in a lot of cases will tell you so much more than the others. But we will talk about active listening here. And there's a structure here that I love. It's called repeating, rephrasing, and reflecting. This requires us to be an active listener to do this. It makes us an active listener, I should say. So let's talk about repeating. In repeating, which is the first part of active listening, we perceive what is being said; we pay attention to what is being said as well as the body language, nonverbal; we remember what was said; which all seems pretty basic; and then we repeat what was said. This is important. Pay attention, remembering, and then repeat. And what we want to do when I say repeat is repeat their words back to them. The reason I find this so important, and I'm just going to break a little bit, I'll never forget – I was in a meeting once and there was four of us in the meeting, my boss, two colleagues, and myself. When we left that meeting, and I spoke to my two colleagues separately, I was shocked to hear that they had two completely different accounts of what went on in that meeting. And that happens more often than not. It's like the game of telephone where you tell one person, you tell another person, and it seems to change along the way. Well, that changes along the way going from person to person. Even if you're not going from person to person, but everyone is hearing the same thing, and yet they take away two completely different things. And that's why this process of active listening is so important, because the first thing I do is I perceive, I pay attention, I remember, and then I repeat back to the communicator – the sender – what they just said to me. I repeat it in their words to make sure that we both now have an understanding that we've heard – I've heard exactly what they have said. My next piece to this, the next stage in active listening, is to, same thing, perceive, pay attention, remember, but then I add in I think and reason about what was said, and then I rephrase it. The difference in rephrasing is now I'm not going to use their words. By adding in that piece, I'm going to think about it, I'm going to reason through it, and then I'm going to rephrase using very similar words, but I'm going to rephrase it a little bit more in my wording back to them what they just said to me – what I understood that they just said to me. And again, the thinking and reasoning means I'm interjecting a bit of my own thought pattern into it, because repeating their words to them doesn't say I understood what they expected the message to be when it came to me. I'm just repeating their words, and we're saying, "Yeah, those are the words I said." That doesn't mean I have received their message as they intended. All they know is that I used the same words. When I rephrase, now I'm starting to interject and say, "Well, basically what I've heard is kind of this," and I'm using similar words to be sure that I'm on the same page. The last step is reflection, or reflecting. Again, perceive, pay attention, remember, think, and reasoning. But now I'm going to reflect on what they said and rephrase it back to them, but in my words. Now I'm saying to them, "What I heard you say in my words is this." Now this is a very important procedure, whether it be in negotiations, whether it be in problem solving, whether it be in project management – it doesn't matter. Related to us here in our discussion today about the front desk, when we get involved in customer service, communications, first impressions, we need to understand what they're saying, and then make sure. "So what I've heard from you is X," because if I don't hear what they're saying properly, if I don't understand it properly, if me and the sender, the communicator, are not on the same page, then I can't help them, because I am going to do the wrong thing for them because I misunderstood what they were trying to communicate. Communication is not easy. Just because somebody said it, and they think they said it appropriately for me to understand it, doesn't mean I understood it. And this process of active listening helps us work towards being sure that when two people communicate, they verify that they both understand exactly what message was in fact communicated. And just a few words on some other aspects of good listening is you've got to listen between the lines. You want to focus on the speaker entirely. What do I mean by that? Again, avoid distractions, barriers to communication, which we'll talk about in a second. But you need to focus. Use silence effectively. I love this one. Sometimes when you're listening to somebody and you're not sure what they just said, repeat it back and then go silent. Let them think about what you said, and respond back. Silence is a great thing because people don't like silence, and it encourages them to speak more. It encourages them to communicate more. Try looking at it from their standpoint, and try addressing their feelings before the facts. In other words, understand the feelings that are behind the facts that are being given to you, going back to that verbal/nonverbal communication. Always ask open ended questions for clarification and elaboration. Don't ask yes or no questions because that's what you'll get, is a yes or no answer. Ask an open ended question. "So how did you feel about our customer service?" Not just, "Were you happy with our customer service?" And the last piece I want to talk about is barriers to communication. Now barriers to communication can be psychological, meaning your emotions, or physical – noise, distractions, things around you. Psychological, your emotions is sometimes people are trying to communicate to you, but you have an emotional attachment to the situation, and therefore, you can't hear what they're saying. And a lot of times in business, that comes out in prejudices. And I'm not talking about just race and stuff like that. I'm talking about prejudices like, "I always heard that this person I'm speaking to has a tendency to be this way or that way." So therefore, as I'm listening to them, I'm filtering what they're saying through that psychological barrier. So you've got to be careful of that. And then of course the physical, which we all know about – the noise in the background, being interrupted, telephone calls, cell phone situations, those kinds of things. We need to avoid those barriers.

[End of recording.]

MANAGING FRONT DESK
MODULE FOUR – TASK MANAGEMENT

Male: Module Four – Task Management. Now let's take a look at task management. Well first of all, before we even get into task management, why is this even part of this webinar? Well, it's a part of it because it's important. Most people working at the front desk don't do just the front desk work. They don't just worry about phone calls and people walking in. They generally have other tasks that they need to deal with. And that's why we talked about customer service in our last module. What I want to look at now is structuring ourselves so that we manage our tasks appropriately so that we are not overworked, overstressed, and creating a bad environment up in the front. Now one of the reasons why people do other things other than just the front desk work is, well, it's not usually a hundred percent of your time to deal with people coming in and answering phones. Now, there's the economical reason. Well, if I've got an employee and I'm paying them, I want them to be as productive as possible. The other side of it, too, is the fact that again, creating impressions. Working at the front desk you have employees coming through there, you have visitors coming through there, you have vendors, you have a lot of people coming through there. One of the last things you want is to give off that impression that you have people sitting around doing nothing. So if your person working at the front desk doesn't have enough work to do that they end up sitting around staring at the wall, staring at the ceiling, reading, or browsing online, or texting and calling friends all day, you've created a problem. You've created a bad perception. So it's good to keep them busy, but we also have to be careful not to keep them too busy, because if they're too focused on tasks, then they lose their focus of taking care of customers and visitors when they come to the office, or telephone calls. So we've got to find and strike a nice, delicate balance between their role as a front desk, as in handling people coming in and setting them up, and dealing with phone calls that come in. So let's take a look now at how we're going to manage our tasks. This is important, because proper task management can really help in a lot of different ways, especially when it comes to stress, which we'll talk about in our next module. Now what I'd like to do is just get some terms down and some basic information. So when we start our task management, we want a list. We want a list of all the things that we need to work on. Now I generally break my list into two things – tasks that are project related. So you generally get a task that is part of a project that somebody else might be working on, but then you also might have to do items that are non-project-related. They have nothing to do with any project or initiative that's going on. It's just day to day stuff that you need to do, whether it be running reports, returning phone calls, anything like that. Now some people need it this way. Some people prefer not to differentiate between a task and a to-do item. Now the next thing we're going to do is once we have this list of our task items and our to-do items, so let's take that list, and the next thing we need to do is we need to put prioritization and some other information with it. First, we need the priority. I don't care if you use a scale of 1 to 5, low, medium, high, what you call it doesn't matter as long as you understand what each of the levels mean. You need a due date. You should have a tickler date or a reminder date. And that's different from the due date. The due date is when this task or to-do item is due. A lot of times, we need to work on it prior to the date that it's due. And a tickler date or reminder date is the date that you want to work on it. So if I have it due on Friday, but I want to start working it on Tuesday, I'm going to put a tickler date or reminder date for Tuesday. Then we're going to create a priority category. This is a little unique, but the priority category is something we should add in. Now let me show you what the priority categories are so that you know how to put them in. And it's this graphic right here. What we're looking at is a basic quadrant setup where we have the benefits are going from bottom to top, and the effort is going from left to right. So the first quadrant we have is low benefit, low effort. We call them fill-in tasks. Then we have low effort, high benefit. And we call those quick wins. They're not going to take us a whole lot of time, but we get a big benefit out of it. Now, then we have low benefit, high effort. We call them drag tasks because they just seem to drag on forever because we know there's not a big benefit to it and we know it's going to take a lot of work, so we have a tendency to avoid it, and it drags on. Then we have high benefit, high effort, and those are your major tasks. Some might call them major wins. So that's how you put each individual task into a product – excuse me, into a priority category. Now what do we do with all of this? Then we move on to our scheduling. Now before we even get into scheduling our tasks and to-do items, we first put into our schedule any appointments that we have, including recurring appointments. Now with the recurring appointments, I talk here, the next one is not just your scheduled recurring appointments, but also email, voicemail, and paperwork. You should be scheduling into your day when you're going to go through your emails, your voicemails, and your paperwork. Now at the front desk, email and voicemail may need to be all day – just like you need to deal with people walking in all day. So you might not end up scheduling that. And then we work on scheduling our to-do items and our tasks. And you'll see by that graphic the end result is our schedule. But notice the balls that are going in. They're going in in a very specific order. What I want you to think about this is if I've got a tub that I need to fill up and I can't go over the top – I have a certain amount of time, a definitive value that I need to fill in. So you think of this as rock, sand and water, and you go to fill in your bucket, you're going to want to put your rocks in first, and then you're going to want to put your sand in, and then your water because the sand will fill in around the rocks, and then the water will fill in around the rocks and the sand. But if you do it the opposite way, and you put the sand in first, you then have trouble sticking the rocks into the sand and finding places for it. You have to move the sand all around. It's not as efficient. And you want to do the same thing with our tasks or our to-do items. We want to take our major tasks or our drag tasks – either one or both, actually – and you want to schedule those. Then you want to put the sand in next. The sand would be our quick wins – those that take a little bit of effort, but give us a big benefit. We want to get those in there. Then the water, they're our fill-ins – those low effort, low benefit tasks that we call the fill-ins. So you go rock, sand, water. Major or drag tasks, quick wins, fill-ins. And that's how you should schedule yourself. Now I strongly encourage you, too, when you go to schedule yourself, we have a normal 8-hour work day. Depending on your role, and if we're talking about a front desk person right now, you have to gage on average how much time during your day is spent dealing with walk-ins and phone calls. And if that happens to be three hours, then you should schedule yourself for five hours' worth of tasks or to-do items. If you spend six hours a day with walk-ins, then you should be filling it in with two hours' worth of tasks and wins and to-do items. So you have to be flexible based on the environment that you're working in. And then now that you have all of this – you've got your lists and your schedule, you should be doing a review. Monthly you should review it from a high level to make sure that your drag tasks are getting done, your major tasks are getting done, and then you should look at it weekly to make sure you schedule that week and fill things in. You can't really schedule your entire month at the beginning. I would encourage you to review monthly the things that you need to do, and then weekly, you actually put them into your schedule, and then daily you review what has gone on so that you can deal with any adjustments that then need to be made. And if you do this, if you get better control over your schedule and your tasks, and you do it appropriately so that you take into account – and this is critical – that you take into account how much time you spend dealing with walk-ins and phone calls, you can schedule yourself so you get things done. You’re productive, but you’re not stressed out. And that’s what we’re going to talk about in our next module, is how to deal with things when the stress hits.

[End of recording.]

MANAGING FRONT DESK
MODULE FIVE – STRESS MANAGEMENT

Male: Module Five – Stress Management. As we go through this webinar, we've talked a lot about the front desk – the receptionist. And perception a lot of times is an easy job, not very stressful. And I would actually argue that point. And I would argue it because if you think about it, we talked just in this webinar about how we need to make sure we give off a good, solid first impression. We need to deal with customer service issues. We need to worry about our communication. Then we have tasks that we need to do on top of all of that. And the truth of the matter is when you combine everything together, this job actually can be quite stressful. So we really do need to talk about how do I manage that stress? How do I maintain a reasonable level of stress so that I really don't burn myself out? So let's take a look at some stress management techniques and things to really consider about how to manage our stress. Now the biggest thing is to remember we are all different. What types of things stress us out are different for everybody. Some people get stressed out about money. Others don't. Some people get stressed out about being on time. Others don't. Some people get stressed out when there's a lot of things going on, and some don't. So we all are vastly different. So I don't have one thing, one magic bullet to make everything okay. But we will talk about a number of different things, and you should utilize these to deal with your own stress – the things that stress YOU out. So the first one you see here is avoid. Well, if I could avoid stress, it'd be easy, right? Well, there are things we can do to avoid unnecessary stress – things that we really shouldn't be doing in the first place. And one of the first things is learn how to say no. Know your limits and stick to them. It's not always something you can control at work. But a lot of times, it is. People ask you to do something, and you have to have the ability to say, "I'm a little overworked right now. I can't take that on." You also need to try and avoid people who stress you out – coworkers, now you can't avoid your boss. You can't avoid certain people. But there are people in your office that just kind of the way they are, the way they deal with things, they stress you out a bit. If you can avoid them, that'd be great. The next thing we have on here is alter. Alter your situation. One of the things is to express yourself. A lot of people keep things bottled up. The problem with bottling it up is then when it does finally release and when it does, it's never done an productive way. It just sort of explodes. And yet if we can allow ourselves to release those feelings, express them, but in a meaningful and productive way, we can avoid this concept of bottling things up and we can settle issues before they become big. The other thing is, as you express those, be willing to compromise. Give a little, take a little concept. Now also, alter the situation. Manage your time better. Managing your time is really important. Traffic is more stressful when you're rushing to get somewhere; not as stressful if you've got extra time to kill. So you've got to think of things like that. That's why that whole module we did on task management was all about managing your time better, structuring things so that you're not always behind the 8-ball. You're not always behind on deliveries, which has a tendency to stress many people out. And the third one is to adapt – adapt to the stressor. If you can't change the stressor, change yourself. Learn to adjust to situations. Reframe your problems. Try to view a stressful situation from a more positive perspective rather than fuming, like we talked about, rather than going nuts about a traffic jam. Look at the positive side of it. It's a time for you to listen to some music you like, listen to a talk show, just think about things. Take it as an opportunity rather than a negative. You also have to take a look at the big picture. Take a bigger perspective of the situation and try to find real solutions to the stressors. Sometimes all we try to do is cover up the stress – make the stress go away temporarily. We never take a step back and say, okay, these are the types of things that stress me, so this is what I have to do overall goal-wise to avoid those, to make them not even happen. And the key is try to focus on the positive. To adapt means you focus on the positives. You adapt to the situation. Number four is accept. Accept the things you can't change. This is going to bring us to Stephen Covey's Seven Habits of Highly Effective People. One of the habits in there that he talks about, which I think is amazing, is what he calls the sphere of influence. Identify those things that are inside the sphere that you can influence. Everything outside of that sphere, ignore it. And the reason you have to ignore it is because if the things that you can't control stress you out, that's a problem because there's nothing you can do about it. You have to adapt, alter, or avoid those situations or yourself so that our not stressed out about things that you can't do anything about. Don't try to control the uncontrollable. And you have to look for the upside. This one, you've got to learn to accept the things you can't change. And if you can't change them, avoid them, find ways to alter yourself to deal with it, or adapt to it. But the bottom line is if they are outside of your sphere of influence, you need to find a way to deal with it because you have no control over it. And our number five is fun time. You need to make time to relax and of a little bit of fun. What that means to you? I don't know. For some it's going for a walk; some it's curling up with a book, listening to music, getting a massage, writing in your journal, working out, taking a long bath, calling a good friend, playing with your pet – there are so many different things. You need to identify what helps you relax and recharge and take advantage of that, because if you don't put some time aside to relax and recharge yourself, everything's just going to keep stressing you out. It's amazing how just a little bit of a step back, avoid everything, calm down, clear your brain out, allow yourself to decompress – all of a sudden, things that you had no idea how to deal with, you find ways to deal with them, or they end up being just a little less stressful. And a bonus one, as some would say, adopt a healthy lifestyle. Exercise regularly, eating better – there are benefits, both mentally and physically, to exercising regularly, eating a better diet. So that's just a bonus one to try and think about adopting a healthier lifestyle, which to be honest, you look at that, it's all five of what we just talked about combined together.

[End of recording.]