



Receptionist Training

(Revised 5/30/19)

Customer Service Pre-Test

A strong customer service ethic means understanding the positive techniques and skills for interacting with the public. CCAR skills include: welcoming demeanor, active listening (confirming your understanding of what was discussed), knowledge of addiction recovery, positive attitude, positive language, and positive body language. For this pre-test, write TRUE next to the actions you should do and FALSE next to the ones that you should not do.

- _____ 1. A phone call is long and a little confusing, so you repeat the caller (in your own words) to confirm your understanding of what has been said.
- _____ 2. If a caller is taking a long time to explain themselves, interrupt them as you need to help visitors at the desk.
- _____ 3. The CCAR phone rings and you ignore it because you are on an important personal call.
- _____ 4. Your pen and notepad are always ready to take messages.
- _____ 5. Give the caller your full attention and don't work on unrelated tasks when the person is speaking.
- _____ 6. Speak clearly and slightly slower when answering the phone than you would during face to face conversations.
- _____ 7. Smile when you talk on the phone, as people can actually "hear" you smiling on the phone.
- _____ 8. Have all visitors sign themselves in.
- _____ 9. If they want to remain anonymous and not sign in, that's okay – just let them in with no name.
- _____ 10. The center has been so busy that you eat lunch at the desk while answering phones.
- _____ 11. Offer a visitor coffee, water, and a seat. Call staff to let them know of their arrival.
- _____ 12. If you need a staff person but they are on the phone or with another person, immediately knock on their door or tap on their window.
- _____ 13. It's okay for two people to sit at the receptionist desk.
- _____ 14. It is okay to leave the receptionist desk to show an interested visitor around.
- _____ 15. Show a visitor the calendar of events and program brochures and call a staff person or another volunteer if the visitor wants more information.
- _____ 16. If a visitor asks about volunteering, give them a volunteer application and write down the date for the next volunteer orientation and Info Session classes.
- _____ 17. A visitor has an appointment but is not sure who it is with. So, you ask them who sent them and what the appointment is about and call another volunteer or staff person for assistance.
- _____ 18. If the center is really busy and you are feeling overwhelmed, ask staff for help.
- _____ 19. The center is empty, so feel free to play some loud music and sing.
- _____ 20. You are the face of recovery, so you represent CCAR in all you say and do.
- _____ 21. A person shows up intoxicated, so immediately get them out of the center – no questions asked.
- _____ 22. It's fine if a person says, "I'm not here for recovery – I'm just grabbing a cup of coffee."
- _____ 23. If it's raining or windy, it's okay if people smoke near the doorway of the center.
- _____ 24. People should not cut through the big meeting room if a meeting is in progress.
- _____ 25. Most of the rules at CCAR do *not* apply to volunteers and staff – they are exceptions to the rules.
- _____ 26. A receptionist – or any CCAR volunteer – can remind a person at the center to refrain from cursing or using offensive language, or talking too loudly.
- _____ 27. Good or bad, your attitude is your attitude – people can take it or leave it!
- _____ 28. (BRCC and WRCC) During an All Recovery Meeting, set the phone to Do Not Disturb, so the meeting will not be disrupted.
- _____ 29. Pets are always welcome at CCAR.

General Etiquette Expectations

Etiquette is a set of behaviors that is considered the best method for performing certain tasks. Listed below are examples of typical receptionist tasks and their corresponding best methods (etiquette).

Answering the Phone

1. End any conversation before picking up the call. Give the caller your full attention – don't watch the computer or your cell phone.
2. Always have a pen and notepad handy.
3. Answer the phone promptly, by the third ring if possible.
4. Use a warm and welcoming voice, even if you are busy. (Did you know that a caller can "hear" your smile? It's true! Always try to smile, even when you are on the phone.)
5. Say with a smile: "Thank you for calling CCAR. This is _____. How may I help you?"
6. Speak clearly and slightly slower than you would during a face to face communication.
7. Allow the person to complete their message without interrupting them.
8. Use active listening to give the caller your full attention. Avoid multi-tasking.
9. Repeat back your understanding of what was discussed.
10. Say that you need to transfer the caller to someone else.
11. Provide the name and direct number of the staff person to whom you are transferring the call, just in case you get disconnected, or if the caller prefers to call the person directly later.
12. Thank the caller for holding.
13. Have a "cheat sheet" of resources available at the front desk.
14. Connect the caller to staff when there is a question or concern that you cannot answer.
15. How to transfer a call:
 - a. While the person is still on the line – and after giving the caller the direct number - press the button with two phones on it (lower right, just above the green phone button).
 - b. Dial the extension or another telephone number.
 - c. Press the two-phone button again. Your call has now been transferred. (If no one answers the transferred call, voicemail will pick up and take a message.)
16. DISTRESS BUTTON – if you need to contact a staff member quickly to draw attention to you at your desk (for example, an agitated visitor or someone acting up), press the DISTRESS button – you will see it on the screen. This will send an alert (from you) to every phone in the building, and will automatically switch to speaker phone, so other people can hear what is occurring. It is not 911.

PRACTICE TRANSFERRING CALLS!

Are you familiar with all the staff names and departments? Are you familiar with the other Recovery Community Centers, as well as Young Adults & Families? Don't forget Stacy Rosay, who is located at the CART office on Charter Oak Avenue in Hartford.

For all people entering the RCC, always greet them with a smile and say, "Hello, my name is _____. Welcome to CCAR – how can I help you with your recovery today?" Make sure you politely ask for the person's full name so you can sign them in – explain the reasons for this, if necessary.

For visitors wanting to volunteer:

- Show visitor the calendar of events and program brochures.
- Offer visitor a seat, water or coffee.
- Contact a Key Volunteer who is in charge of center hospitality for the day to see if they are available to give a mini tour and answer questions.
- OR call the Volunteer Coordinator. It is always best to introduce a potential volunteer to the Volunteer Coordinator.
- Give interested visitor volunteer application and write down the date for the next Volunteer Info Session and Volunteer Orientation class.
- Offer the guest the option of filling out the application or they may take it and return it at a later date
- If the guest chooses to fill out the application on the spot, give the completed application to the Volunteer Coordinator.

For Visitors:

- Show visitor calendar of events, event flyers, and meeting schedule.
- Offer peer to peer program brochures, such as Telephone Recovery Support (TRS), Recovery Coach, etc..
- Know the recovery coach schedule and availability.
- Discuss computer resource room; making sure visitor knows computers are primarily for job related activities and housing searches; there are time limits for usage; and to ask a staff person or Key Volunteer if computers are full.
- Contact a Key Volunteer (or an experienced volunteer) to see if they are available to give a mini tour and answer questions.

For Visitors Asking for Specific Staff Members:

1. Have a list of staff name, position, office number, and email directory.
2. For Phone calls: (follow procedure listed above)
3. For appointments with staff:
 - Offer the visitor a seat, water, and/or coffee.
 - Write down the full name of the visitor.
 - Call staff and give full name of the person waiting.
 - Ask staff if they are coming to receptionist to greet appointment or if appointment should be directed to their office. (If the visitor is going upstairs at HRCC, they should be accompanied by the receptionist or a Key Volunteer.)

For Help Finding Recovery:

- Sign in the visitor.
- Offer a seat, water, and coffee.
- Offer the visitor a recovery coach or Key Volunteer or staff person.

For visitors asking if a specific person has been to the center:

- If anyone (such as a police officer or parole officer) comes in and asks if a person has been here, tell them politely to wait and get a staff member to assist them. NEVER show another person the sign-in book.

Quick Reference Sample Scripts

A caller looking for staff: "Thank you for calling CCAR. This is _____. How may I help you today with your recovery? The staff person's name and direct number is _____. Please hold while I connect your call."

All walk-ins: "Hi, my name is _____. Welcome to CCAR. How may I help you today with your recovery?" And then, "What is your name so I may sign you in?"

Staff Appointment: "Please have a seat while I contact _____. Can I get you coffee or water?" (Inform staff person their appointment is here.) "Would you like me to send them to your office?" (At HRCC, a visitor should be met by staff or accompanied to the second or third floor.)

Recovery Coaching: "Please have a seat while I contact today's recovery coach."

Resource request: "I have some resources at my desk that may help you. OR "Have a seat and I will get a staff member (or volunteer) who can help you."

Help with Recovery: "Please have a seat. Can I get you coffee or water? A Recovery Coach or another volunteer or a staff person or will be right out to help you."

CCAR information: "Are you familiar with CCAR? CCAR's mission and vision is... The center offers a variety of activities and peer support services. Here is our calendar, flyers on CCAR or community events and our program brochures. Are you interested in volunteering? Here is a volunteer application. Please fill it out and bring it with you for the Volunteer Orientation or Information Session. The next orientation or Information Session is scheduled on _____. Have a seat and I'll find a volunteer to show you around and answer your questions."

Other Duties for Receptionists

The receptionist is a critical role – an effective receptionist is a friendly face who welcomes vulnerable people and explains CCAR’s mission, but at the same time, an effective receptionist also enforces rules in a polite but firm way, being assertive but not aggressive. It is an important role (and yes, all volunteers are important) and every visitor is due our respect from the start – our RCC is here for the recoveree.

Please keep the reception area neat. Are there current calendars on the desk? Are there brochures neatly arranged on the desk? Are the posters up to date? Make sure you have what you need to do your job: the staff contact list, the resource book, phone message pads, pens...

The reception desk is for trained volunteers ONLY. Do not invite friends – or other volunteers - to sit there with you. If you must leave the desk, please inform the Volunteer Coordinator or the Center Manager, and they will assist you in getting another volunteer to cover in your absence.

When you are at the desk, there is often a temptation to focus on the computer or your cell phone, especially when things are quiet. Please keep your focus on the door, the lobby and our visitors. Always make the visitor your priority. Give the visitor your full attention, which includes eye contact. Smile and be welcoming.

Pets are not allowed at CCAR – only service animals (not therapy pets, emotional support pets or companion pets). They must have a harness and/or leash, and the owner needs to be in control of them at all times (and the pet must be housebroken). Let a staff member know if a person arrives with a Service Animal (or a pet).

Be familiar with the calendar. Know the meetings and events that are scheduled for the day.

Please make sure that people are not smoking in front of the building, even if it is raining. Inform them (politely but firmly) that they can smoke _____.

Make sure that it does not get too loud in the lobby area – voices carry. Politely tell visitors there is a meeting in progress.

If there is an All Recovery Meeting going on, then that is the only activity in the RCC for that hour: no computers can be used at this time. Ten minutes before a meeting, walk through the center and remind people that a meeting will soon take place (and if it is an ARM, all are invited to attend this meeting, or else they must leave for the hour). TRS calls may be made, and staff can keep appointments. Volunteers may stay in the computer area if they are quiet. People (staff and volunteers included) should not cut through the big room during an ARM or another meeting. (The HRCC receptionist should unlock the side door so that HRCC visitors can walk around the building and use the side entrance, The BRCC receptionist should lock the front door and sign people in at the computer entrance. The WRCC receptionist may stay at the reception desk, or have ARM attendees sign themselves in). At BRCC and WRCC, the phone should be set to Do Not Disturb: after the meeting, return it to regular operation.

If there is another event occurring in the big room, remind people (about ten minutes before the event starts) that an event will occur there in ten minutes. This meeting should not be interrupted by people cutting through or getting coffee (this includes volunteers and staff – no exceptions). Cutting through a room during a meeting or training is very distracting and disrespectful – please try to walk around the room so the group may continue without interruption.

Please collect the mail and deliver it to staff. (At the HRCC, only a receptionist or Key Volunteer may go upstairs to the second or third floor. No else should be in the stairways. If someone (volunteer or visitor) needs to go upstairs, please contact the staff person they are seeing, to get the okay from them. Once the staff person knows someone is coming up to see them, you can then send the visitor with another volunteer to see them.)

A good receptionist will walk through the center - or at least look around it - periodically to ensure that all is well and people are where they should be (it is harder to visually sweep the HRCC than the other RCCs). The TRS phones are for TRS calls only. The computers are for job and housing searches and communication, not for playing games and watching videos (another volunteer should be supervising the computers, but a receptionist can remind visitors of the rules).

Are you familiar with the Emergency Response Procedures, posted by the desk? You should know what to do in case of an emergency, such as a fire or medical emergency. If a police officer shows up, immediately inform a staff member.

Please read “Stay In Your Lane,” a short article by CCAR’s Executive Director Phil Valentine. This article defines what a Recovery Community Center is *and* does – a good receptionist helps us “stay in our lane,” and he/she also defines that lane to visitors. A good receptionist is familiar with CCAR’s Vision Statement, Mission Statement and Values, too. If you had ten seconds to explain what a recovery center is, what would you say?

Always consider the CCAR values and follow them to the best of your abilities:

- Recovery first!
- You are in recovery if you say you are.
- There are many pathways to recovery.
- Focus on the recovery potential, not the pathology.
- Err on the side of the recoveree.
- Err on the side of generosity.

Our RCC should be a judgment-free zone, and that starts with the receptionist, who is often the face of CCAR. All CCAR volunteers should be respectful, courteous, positive and helpful, but especially the receptionist, who helps set the tone for the RCC.

We thank you for your time and dedication to being a receptionist. **Please make sure that your shift is accurately listed on the white schedule board near the Volunteer Coordinator’s office.** If you can not keep your shift, or if you are running late, please contact the Volunteer Coordinator or the Center Manager.

Practice Role Play Activities (or Post-Training Test)

Below are examples of some of the situations a recoveree may have to deal with while volunteering as a receptionist. What would you do if faced with the following situations? Review the responses or role-play.

1. A visitor comes into the center and says his probation officer sent him to do his community service work at CCAR.
2. A visitor shares that he is new in recovery and is interested in volunteering because he want to give back.
3. An extremely frustrated and irate caller demands help because they are about to get kicked out of their sober house and do not have a job. They keep interrupting you every time you try and say something.
4. A mother and her toddler walk-in; they are homeless. She asks for help telling you she does not know what to do or where to go.
5. A recoveree walks in who has heard that CCAR has a program to help him/her get a job and wants to hear more about it.
6. A person just got out of treatment, needs housing and was told that CCAR can help him/her.
7. You answer a call from someone who wants to speak to a staff person.
8. A person walks in the door stumbling, with slurred speech and asks for help.
9. A person arrives for an All Recovery Meeting smelling like alcohol.
10. Two people who have not seen each other in a while are hugging and loudly catching up with each other while a meeting is occurring in the next room.
11. A recoveree comes in and says he/she just got in a fight with a family member, is stressed out, and feels like using.
12. A visitor arrives who has an appointment with a staff person, but that staff person is on the phone or meeting with someone else.
13. A visitor tells you they have an appointment but does not know with whom or what it is for.
14. A visitor refuses to tell you his last name when you ask to sign him in.
15. When you ask, "How may I help you in your recovery?" a visitor replies, "I'm here to get a cup of coffee."
16. A visitor says he needs to use the phone (or the copier, or the fax machine...)
17. A visitor comes in and asks for a bus token (or for clothing).
18. A police officer enters the RCC and asks you if you have seen a person who fits the following description...
19. A visitor comes in and it looks like she has a can of beer in her pocketbook.
20. A visitor comes in but does not speak English.
21. A person asks if you can store their backpack behind the desk while they do something.
22. The center is quiet, so another volunteer sits with you behind the reception desk.
23. An All Recovery Meeting is about to start and you (the receptionist) want to attend it.
24. A person arrives 30 minutes late for an All Recovery Meeting.
25. While you are covering the desk, a friend asks you to come get lunch with him.
26. You need to leave the reception desk before your shift ends.
27. A person arrives with a dog, saying it is a therapy dog.
28. A service dog wanders around the center sniffing people.