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ABSTRACT

In this brief course outline are material and content designed to provide students with the knowledge and skills needed to act as receptionists in an office atmosphere. Functional duties—telephone calls, petty cash, simple typing jobs, making travel arrangements and appointments—compose the course content. Also provided: performance objectives (listing 40 specific tasks), learning activities, strategies and learning activities, evaluative instruments, and resources for students and teachers. (NH)



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7716.12 (New: 764..12)

Business Education



DADE COUNTY PUBLIC SCHOOLS

DIVISION OF INSTRUCTION-1971

RECEPTIONIST TRAINING

7716.12 (New: 7644.12)

Business Education

Written by Frederick Reed
And Approved by the Business Education Steering Committee
For Quinmester Courses

for the

DIVISION OF INSTRUCTION
Dade County Public Schools
Miami, FL 33132
1972



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- I. COURSE TITLE-RECEPTIONIST TRAINING
- II. COURSE NUMBER-7716.12 (New: 7644.12)

III. COURSE DESCRIPTION

A. Synopsis

For students desiring knowledge and skill needed to perform basic reception duties. Includes instructions on handling telephone calls, petty cash, and simple typing jobs; making telephone calls, travel arrangements, and appointments; and receiving visitors.

- B. Textbook-Wood, Merle W. and McKenna, Margaret A. <u>The Receptionist</u>. New York: Gregg Division of McGraw-Hill Book Co., 1966 or one of the department's choosing.
- C. Occupational Relationships—Receptionist
 Secretary
 Office general clerk
 Switchboard operator

IV. COURSE ENROLLMENT GUIDELINES

- A. Prior Experiences Needed

 The student should have attained the objectives of Filing and
 Finding and E-Z Way to Type prior to enrollment in this course.

 The student would profit by taking Rapid Writing as a supplement to this course.
- B. Student Classification
 This quinmester course may be offered as early as the tenth
 year of school; however, its value as an employment skill makes
 it advisable for students to enroll in the eleventh or twelfth
 year.
- C. Pretest
 The test should cover the objectives of Filing and Finding and
 E-Z Way to Type as well as the objectives of this course. The
 Course of Study Performance Objectives that follow this section
 are arranged to enable the teacher to prepare this portion of
 the pretest with a minimum of modification. Since this course
 lends itself very well to individualized instruction, the
 pretest should prove invaluable in determining individual
 placement of each student.
- V. COURSE OF STUDY PERFORMANCE OBJECTIVES

Upon completion of this course, a student will be able to-

- 1. list at least five duties that may be required of a receptionist;
- 2. give the placement of a receptionist job in the hierarchy of office occupations;



V. COURSE OF STUDY PERFORMANCE OBJECTIVES, Continued

- 3. list three types of company publications and their purposes;
- 4. describe several reference books that the receptionist should have on hand;
- 5. give an acceptable response to a request for an appointment;
- 6. explain why the receptionist should know about the products or services and the history of her company;
- 7. explain why the receptionist should make each caller feel that he is important;
- 8. match three given case histories of problem callers with three given techniques for receptionist action;
- 9. describe how the receptionist can show that she is interested in the caller and his problem;
- 10. state the criteria for determining regular callers who should receive special consideration;
- 11. give at least three reasons why the receptionist should be thoroughly familiar with the hiring procedures of her company;
- 12. list five pointers that would assist a receptionist in dealing with difficult callers;
- 13. list four procedures that could be used to usher a caller from the reception room to the office he is visiting and explain why it is important for a company to have an efficient procedure for ushering callers;
- 14. list three ways in which a receptionist can demonstrate courtesy over the telephone;
- 15. list four important sections of the telephone directory, other than the alphabetic section;
- 16. name three ways to ask a telephone caller for his name;
- 17. describe briefly the information that should be recorded in a telephone message;
- 13. give three reasons for sending a telegram as a day letter, and three reasons for sending it as a night letter;
- 19. describe how the telegraph company determines the word count of numbers, letters, and abbreviations;



V. COURSE OF STUDY PERFORMANCE OBJECTIVES, Continued

- 20. demonstrate his knowledge of a six-button telephone and a card dialer by answering 8 out of 10 objective questions correctly;
- 21. name the two important skill areas of the switchboard receptionist;
- 22. list the items the switchboard operator should have on hard:
- 23. differentiate between the cord-type switchboard and the cordless switchboard;
- 24. list at least two unique features of the call director;
- 25. determine the mail classification to be used in four given situations;
- 26. give at least two common practices in sorting incoming mail:
- 27. give three advantages of using a postage meter;
- 28. give four steps, in order, for using a postage meter;
- 29. describe the process of using vouchers when disbursing petty cash and of replenishing a petty cash fund;
- 30. state two important features that distinguish traveler's checks;
- 31. describe two types of check endorsement;
- 32. prepare an itinerary that could be used by an executive to a city out of this state given the method of travel and time:
- 33. prepare a deposit ticket from given information on currency, coins, and checks:
- 34. list six sources of information about receptionist employment;
- 35. prepare a personal resume;
- 36. type given information on printed forms using proper alignment:
- 37. type from rough draft copy making one carbon copy at a minimum rate of 15 words a minute for three minutes with no more than three errors:
- 38. correct typewritten errors using eraser, correction paper, and correction fluid;
- 39. address envelopes at the typewriter, using correct placement and making corrections, at the rate of two envelopes per minute; and



V. COURSE OF STUDY PERFORMANCE OBJECTIVES, Continued

40. Match the following terms with given definitions:

accessories accommodations air parcel post appropriate area code attitude auditing automatic dialer budget call director carriage certified mail clientele COD collating communication competition confirmation consideration courteous cross-reference day letter DDD deposit slip direct inward dialing directory discretion duplicating efficiency emotion empathy employment agency endorsement etiquette expression fluid duplicating foreign exchange full rate image impression indexing initiative intercom

itinerary judgment magicall marine service mimeograph mobil service money order multiple line unit multiple listing night letter objectivity overseas service PBX periodical personality personal calls petty cash philosophy postage meter procedures qualifications receptionist reference registered mail résumé routing slip shuttle service sincerity solicitor stability station calls sympathetic tact ticket file tie line time zone touch tone telephone traveler's check verif" versa. .ity

voucher WATS

ZIP code

interview

VI. COURSE CONTENT

A. Introduction

1. Definition

insured mail

2. Usual duties



- B. Desirable Qualities
 - 1. Personal characteristics
 - a. Empathy
 - b. Thoughtfulness
 - c. Tact
 - d. Discretion
 - e. Versatility
 - f. Objectivity
 - g. Initiative
 - 2. Professional attitudes
 - a. Dependability
 - b. Accuracy
 - c. Organization
 - 3. Communication techniques
 - a. Listening
 - b. Speaking
 - c. Telephoning
 - 4. Business skills
 - a. Typewriting
 - b. Processing mail
 - c. Filing
 - d. Keeping records
 - e. Making notes
 - 5. Appearance
 - a. Clothing
 - (1) Appropriate
 - (2) Becoming
 - (a) Style
 - (b) Colors
 - (3) Maintenance
 - (a) Clean frequently
 - (b) Press
 - (c) Repair
 - b. Accessories
 - (1) Shoes and stockings
 - (2) Handbags
 - (3) Jowelry
 - (4) Scarves
 - c. Good grooming
 - (1) Cleanliness
 - (2) Complexion
 - (3) Cosmetics
 - (4) Hair care
- C. Overall Impression
 - 1. Physical image
 - a. Facial expression
 - b. Carriage
 - c. Voice
 - d. Health
 - (1) Weight control



- (2) Nutrition
- (3) Exercise
- (4) Relaxation
- (5) Sleep
- 2. Attitude
 - a. Pleasant
 - b. Alert

D. Employment Opportunities

- 1. Specialized office
 - a. Lawyer
 - b. Doctor
 - c. Dentist
- 2. Small company
 - a. Professional office
 - b. Partnership
- 3. Corporation
 - a. Service oriented (as utility, insurance, or finance)
 - b. Manufacturer
- 4. Sources of employment
 - a. School
 - b. Employment agencies
 - (1) Commercial agencies
 - (2) Covernment agencies
 - (3) Non-profit agencies
 - (4) Large company personnel departments
 - c. Advertisement
 - (1) Newspapers
 - (2) Trade journals
 - d. Yellow pages
- 5. Letter of application
- 6. Résumé
 - a. Personal data sheet
 - b. Letter of application
- 7. Interview
- 8. Application form
- 9. Follow-up

E. Learning Your New Job

- 1. Discover expectations of the employer
- 2. Adjust to the situation
- 3. Learn company policies
- 4. Get acquainted
- 5. Adjust to problem co-workers
 - a. Critic
 - b. Gossip
 - c. Despot

F. Know Your Company

- 1. Gather information
 - a. People



- b. Company publications
- c. Organizational charts
- d. Plant map
- e. Departmental meetings
- f. Telephone directories
- g. Miscellaneous references
 - (1) Local newspapers
 - (2) Postal manuals
 - (3) World almanac
 - (4) Dictionary
- 2. Retain pertinent information
 - a. Various departments
 - b. Company history
 - c. Company's business philosophy
 - d. Special services
 - e. Company's products
 - f. In-service training programs

G. Greeting Visitors

- 1. Welcoming the caller
 - a. Indicate an interest
 - b. Give complete attention
- 2. Making the visitor comfortable
 - a. Provide information
 - b. Suggest activity (if arriving early or unexpected)
- 3. Announcing the caller
- 4. Special situations
 - a. Difficult callers
 - b. Talkative callers
- 5. Recording the visit
 - a. Visitors' log
 - b. Executive card file
 - c. Visitors' cards
- 6. Regular callers
 - a. Recognize regular visitors
 - (1) Remember names, company represented, and products
 - (2) Special considerations
 - b. Repeat callers
 - (1) Executives' friends
 - (2) Executives' families
 - (3) Branch office executives
 - c. Special problems
 - (1) Overfamiliarity
 - (2) Special favors
 - (3) Imposing on your time
 - d. Receiving job applicants
 - (1) Philosophy of personnel department
 - (2) Interview policies of the company



- Dealing with Difficult People
 - 1. Possible problem types
 - a. Nervous person
 - b. Aggressive caller
 - c. Uncooperative visitor
 - Angry caller
 - (1) Hear him out
 - (2) Be sympathetic(3) Don't criticize

 - (4) Take positive action
 - e. Fund solicitor
 - Peddler
 - Children
 - hardicapped caller
 - (1) Hard-cl-mearing
 - Blind
 - 3) Elderly
 - (4) Foreigners
 - Guidelines for difficult moments
 - a. Remain objective
 - b. Keep calm
 - c. Be sympathetic and pleasant
 - d. Attempt to help
 - e. Be tactful
 - f. Think before you act
 - g. Expect the best of people
- I. Escorting Visitors
 - Procedures for escorting the visitors
 - a. Give oral or written directions (small office)
 - b. Receptionist escorts the visitor to the office
 - (1) Set a reasonable pace
 - Warn him of any hazard (2)
 - (3) Clear the way for him
 - (4) Introduce the visitor
 - Introduction
 - a. Simple courtesies
 - (1) Pronounce each name clearly and slowly
 - (2) Give each person's title and company accurately
 - (3) Mention first the person you want to honor
 - b. Basic guidelines for persons involved
- J. Effective Telephone Techniques
 - 1. Voice
 - a. Speak naturally and pleasantly
 - b. Speak using variety and flexibility
 - c. Speak clearly and distinctly
 - 2. Answering procedures
 - a. Answer promptly
 - b. Greet the caller
 - c. Indentify the company



- d. Determine the caller's name
- e. Aid the caller
- f. Holding a call
- g. Interrupting a call
- h. Use courteous expressions
- i. Use the caller's name
- j. Give complete attention
- k. Be genuinely sincere
- 1. Verify important facts
- m. Take messages
 - (1) Call for
 - (2) Call from
 - (3) Date
 - (4) Time
 - (5) Telephone number
 - (6) Check list
 - (7) Message lines
 - (8) Initials
- n. Deliver messages
- 3. Originating procedures
 - a. Placing calls
 - b. Dialing correctly
 - c. Giving messages
 - d. Leaving messages
 - e. Transferring calls
 - f. Handling cut offs
 - g. Receiving assistance from operator
 - h. Learn telephone tones
 - (1) Busy signal (60 interruptions a minute)
 - (2) Fast signal (120 interruptions a minute)
 - i. Telephone directory
 - (1) Listings
 - (2) Cross-references
 - (3) Multiple listings
 - (4) Direct inward dialing
 - (5) Designations
 - (6) Government listings
 - (7) Yellow pages
 - (a) Index
 - (b) Advertisements
 - (8) Special information

K. Long Distance Telephoning

- 1. Types of calls
 - a. Local
 - b. Station
 - c. Person
 - d. Collect
 - e. Credit card
 - f. Billing to a third number



- 2. Rates
 - a. Day
 - b. Evening
 - c. Night
- 3. Business services
 - a. Foreign exchange
 - b. Tie-lines
 - C. WATS
- 4. Time zones
- 5. Recording long distance charges
- 6. Special calls
 - a. Conference
 - b. Mobile and marine service
- 7. Direct distance dialing
 - a. Placing DDD calls
 - b. Information
 - c. Wrong numbers
 - d. Cutoffs
- L. Telephoning Equipment and Telegraph Service
 - 1. Telephone instruments
 - a. Six-button telephone
 - b. Touch-tone telephone
 - c. Multiple-line units
 - 2. Automatic dialers
 - a. Card dialer
 - b. Magnetic tape dialer
 - 3. Telegraph service
 - a. Companies offering services
 - (1) Domestic telegrams (Western Union)
 - (2) International telegrams
 - (a) Radio Corporation of America
 - (b) International Telegraph and Telephone
 - (c) Western Union International
 - b. Domestic service classes
 - (1) Full rate
 - (2) Day letter
 - (3) Night letter
 - c. International classes of service
 - (1) Full rate cable
 - (2) Letter telegram
 - (3) Shore-ship message
 - d. Word count
 - e. Typing
 - f. Sending
 - g. Receiving
 - h. Special services
 - (1) Verification
 - (2) Charge and collect
 - (3) Messengers
 - 4) Money



- The Switchboard Receptionist
 - 1. Available positions
 - a. Hospitals
 - b. Notels
 - c. Hotels
 - d. Advertising concerns
 - e. Fashion houses
 - f. Sales offices
 - 2. Switchboard receptionist skills
 - a. Knowing the switchboard
 - b. Greeting callers
 - c. Handling interruptions
 - d. Assisting callers
 - 3. PBX boards
 - a. Cord-type PBX
 - b. PBX consoles
 - 4. Switchhoard techniques
 - 5. Call directors

N. Handling Mail Efficiently

- 1. Processing incoming mail
 - a. Postage-due mail
 - b. Mail sorting
 - c. Mail opening routines
 - (1) Hechanical letter opener(2) Hand letter opener
 - d. Stamping date and time
 - e. Sorting mail
- 2. Processing outgoing mail
 - a. Sorting
 - b. Weighing
 - o. Stamping
 - (1) Postage stamps
 - (2) Postage meter
- 3. Organization of routine
 - a. Specialize
 - b. Arrange material
 - c. Avoid backtracking
 - d. Use mechanical devices
- 4. Classes of mail
 - a. First-class mail
 - b. Second-class mail
 - c. Air parcel post
 - d. Third-class mail
 - e. Fourth-class mail (parcel post)
 - f. Special fourth-class mail
 - g. Airmail
- 5. Special services
 - a. Special delivery
 - b. Special handling
 - c. Registered mail



- d. Certified mail
- e. Insured mail
- 6. ZIP code system
- 7. International

O. Money Responsibilities

- 1. Petty cash
 - a. Analysis sheet and vouchers
 - b. Replemishing
 - c. Care of the funds
- 2. Bank deposits

 - a. Deposit slipb. Endorsing checks
- 3. Money orders
- 4. Travelers checks

P. Travel Responsibilities

- 1. Making arrangements
 - a. Air travel
 - (1) Time considerations
 - (2) Reservations
 - (3) Confirmations
 - 4) Payment
 - Shuttle service
 - hirport transportation
 - (7) Baggage
 - Railroad or bus travel
 - c. Boat travel
 - d. Hotel reservations
 - (1) late arrival
 - (2) Deposit
- 2. Organizing arrangements
 - a. Trip folder
 - b. Itinerary

Typing

- 1. Forms
- 2. Envelopes
- 3. From rough drafts
- 4. Carbon copies
- 5. Corrections

SUGGESTED PROCEDURES, STRATEGIES AND LEARNING ACTIVITIES VII.

The teacher must attempt to present realistic situations that are applicable in business and government. The student's attention must be focused on the role of the receptionist, and she should be aware of the opportunities available through this position.

If the school has a course Employability Skills, the teacher should consider having the students participate in that course instead of including Parts B, C, and D in Section VI of this course.



VII. SUGGESTED PROCEDURES, STRATEGIES, AND LEARNING ACTIVITIES, Continued

Since the receptionist spends the major portion of her time working with people, special emphasis is placed on human relations. The following techniques may be utilized in presenting the content of this course. Select any or all of these suggestions that you feel will be beneficial.

A. Reading from Basic Text

The basic text will serve as one of the primary sources in obtaining information as it contains detailed explanations, examples, and illustrations.

B. Discussing Content

Discussion of important topics will aid greatly in comprehension. Discussion may occur in standard class size and small groups. In small group discussion, group leaders who have the ability to work with individuals should be assigned.

C. Reacting to Case Studies

Case studies are available in many leading textbooks or may be prepared by the teachers. Each case should be read carefully because each illustrates some kind of mistake made by the receptionist or a problem confronting her. Some cases will contain one major error; in others, the student will find several mistakes. The student will answer the questions that follow indicating his knowledge of a receptionist's duties and her ability to make good judgments.

D. Solving Problems

Many problem situations are included in basic textbooks. These problems have been developed to give students some experience in the everyday work of a receptionist. The problems are designed to lead students to think about their qualifications and qualities and to relate them to the job of receptionist. The problems acquaint the students with the processes and methods involved in arriving at a solution.

E. Completing Projects

Group projects are extremely useful in the preparation of bulletin board displays and exhibits. Individual projects could include notebooks and scrapbooks.

F. Presenting Reports

The students may be assigned topics to research thoroughly (job interview, job search, filing, telephone techniques, etc.).

They could share the results of their studies by giving oral



VII. SUGGESTED PROCEDURES, STRATEGIES, AND LEARNING ACTIVITIES. Continued

F. Presenting Reports, Continued

reports to the class or by providing class members with copies of their written reports which would be included in the class notebook.

G. Collecting Resources

Notebooks, scrapbooks, and/or folders may be used by the students to collect various materials that would be applicable to the course. Much supplementary printed material exists and should be included in the curriculum. Teacher prepared materials supplementing the text should be saved by the students for future reference. The students should be encouraged to search for valuable tips in newspapers and appropriate magazines (see Resources for Students).

H. Using the Teletrainer

Southern Bell's Teletrainer unit is especially helpful in developing telephone manners and voice control. If this is not available, the teacher can devise a program using a tape recorder.

I. Training Outside of the Classroom

The telephone and its effective use plays an enormous role in this course. It is very possible that students could receive supervised PEX training on the school's switchboard with the cooperation of the office staff. Students, on a rotating basis, could strengthen telephone techniques and strengthen skills by using learned information.

J. Listening to Guest Speakers

Community resource people add a touch of variety in content and presentation that may be beneficial to the class. Guest speakers with job experience could answer many questions regarding local job opportunities, salary ranges, and fringe benefits. Girls now working as receptionists might explain the importance of appearance and discuss their special responsibilities.

K. Completing Individualized Activities

Many activities exist that can be done by an individual. Since the class will be made up of people interested in different areas, varied activities may be developed to enable students to select a particular activity of their choice. They might include planning a clothes budget, making a wardrobe inventory, and completing a self-analysis inventory.



VII. SUGGESTED PROCEDURES, STRATEGIES, AND LEARNING ACTIVITIES, Continued

L. Listening to Teacher Presentation

A lecture may be presented to the entire class or less formally to a small group. The lecture presentation is helpful in presenting new concepts and helps to reinforce content presented in some other activity.

VIII. EVALUATIVE INSTRUMENTS

A. Pretest

A pretest may be administered on the first day in order to determine what the students already know about the course content. Pretest results are very beneficial as they provide valuable results which may be used in planning individual activities and assisting in general placement within the course. It may be impossible to measure all of the objectives in one class period; if so, the teacher should divide the test into two or more parts.

B. Interim Tests

Interim tests should be used to measure the objectives that are included within the individual units. All of the course of study performance objectives should be measured within the series of interim tests. The test results will indicate strengths and weaknesses of various concepts. Those students that demonstrate a weakness in a given area should be guided into activities that will enable them to meet the objectives of that area before proceeding to the next area.

C. Posttest

A posttest may be administered at the end of this course. It should be a parallel of the pretest and should assist in evaluating the effectiveness of the learning activities, methods, and strategies. It may be impossible to measure all of the performance objectives within one class period; if so, the teacher should divide the test into two or more parts.

D. Products

Product evaluation is effective and may be used as a part of the interim tests; such as evaluating a personal résumé, report, essay, written explanation, or bulletin board display.

E. Observation

Visual checks assist in evaluating discussion or participation, reactions, behavior patterns, and the operation of related equipment (e.g., six button phone or card dialer).



IX. RESOURCES FOR STUDENTS

A. Books and Booklets

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- Office Girl's Workshop-Portfolios 1 through 17. Waterford: The Bureau of Business Practices, Inc., 1964.
- Secretarial Shortcuts. International Business Machines Corp., 590 Madison Avenue, New York, 1970.
- Silverthorn, J. E. and Perry, Devern J. Word Division Manual, 2nd edition. Cincinnati: South-Western Publishing Co., 1970.
- United States Government Printing Office Style Manual Superintendent of Documents, U. S. Government Printers Office, Washington, D. C. 20402.

C. Media

- Business Education Series. Young America Filmstrips, Color. New York: Gregg Division of McGraw-Hill Book Company.
- Secretarial Training. Sound Filmstrips, black and white.
 New York: Gregg Division of McGraw-Hill Book Company.
- Secretarial Training Records. New York: Gregg Division of McGraw-Hill Book Company.
- Teletrainer. Local Southern Bell office.

X. RESOURCES FOR TEACHERS

A. Books, Manuals and Handbooks

Teachers' editions, manuals, and keys are available for most



X. RESOURCES FOR TEACHERS, Continued

- A. Books, Manuals and Handbooks, Continued
 - of the books listed in the "Resources for Students" section of this outline.
 - A Guide to Business Education in Florida Schools, bulletin 72.
 Tallahassee: State Department of Education, 1967.
 - Business Education Yearbooks, annual. National Business Education Association, 1201 Sixteenth Street, N.W., Washington, D. C. 20036.
 - Teaching Business Education in the Secondary Schools, bulletin 11. Tallahassee: State Department of Education, 1959.
 - Terry, George R. Office Management and Control, 4th edition. Homewood, Ill.: Richard D. Irwin, Inc., 1965.
 - Tonne, Herbert A. Principles of Business Education, 3rd ed.
 New York: Gregg Division of McGraw-Hill Book Company, 1970.
 - Tonne, Herbert A.; Popham, Estelle L.; and Freeman, M. Herbert.

 <u>Methods of Teaching Business Subjects</u>, 3rd edition. New
 York: Gregg Division of McGraw-Hill Book Company, 1965.

B. Periodicals

- Balance Sheet. The. Cincinnati: South-Western Publishing Company. Monthly, October through May.
- Business Education Forum. Washington, D. C.: National Business Education Association. Monthly, October through May.
- Business Education World. New York: Gregg Division of McGraw-Hill Book Company. Five issues each school year.
- Journal of Business Education. East Stroudsberg: Robert C. Trethaway. Monthly, October through May.
- Modern Office Procedures. Cleveland: The Industrial Publishing Co., Division of Pittway Corporation. Monthly.
- Office, The. Philadelphia: Office Publications, Inc. Monthly.
- Today's Secretary. Teacher's edition. New York: Gregg Division of McGraw-Hill Book Co. Monthly.

