Meadow Ridge Front Desk Training Manual

Represent the Heart of the Community

You're not "just answering phones," you're the voice and face of the community.

As the first point of contact for residents, families and future residents, the front desk team plays an essential role in representing the warmth, professionalism and distinctive excellence that Meadow Ridge is known for. Your warmth helps residents feel safe, families feel confident and visitors feel welcome.

This manual acts as a reference to help you provide outstanding service and ensure consistent communication. Every kind interaction makes a difference in someone's day.

Section 1: Phone Etiquette

We want every caller to experience the professionalism, care and attention that define Meadow Ridge. How we answer the phone and interact with callers says a lot about our organization.

These practices apply to every call you receive.

ANSWERING THE CALL:

- **Answer promptly**. Pick up within two or three rings.
- **Never answer mid-conversation.** Finish speaking to anyone nearby or pause the conversation before answering the phone
- **Avoid using speakerphone.** Use the handset or headset for privacy and sound quality.

Phone answering script example:

"Thank you for calling Meadow Ridge. This is [your name]. How may I assist you today?"

DURING THE CALL:

Speak with a smile. Smiling changes your tone—it helps callers feel welcomed and valued.
Be clear and professional. Enunciate your words, use a moderate pace and tone and avoid slang.
Listen actively. Give the caller your full attention, take notes and repeat key details back to confirm understanding.
Be patient. Some residents may have hearing or cognitive challenges.
Be discreet. Maintain confidentiality in all resident-related matters (HIPAA compliance).
Avoid distractions. Do not eat, drink or converse with others while on a call.
Be a positive problem-solver. Instead of saying 'I don't know,' say, 'Let me find out for you.'
Check back in when on hold. Always check back in with the caller if they are on hold for more than 30 seconds to remind them you are still there.

ENDING THE CALL

Ask before placing on hold. 'May I place you on hold for a moment while I check that for you?'
Transfer calls carefully. Let the caller know who they are being transferred to and why.
End gracefully. 'Thank you for calling Meadow Ridge. Have a [pleasant, wonderful] day.'
Take accurate messages. Record the name, phone number, date, time and reason for the call clearly and completely.

Section 2: Transferring Calls

Identify: Nature of the call
Acknowledge and reassure: "I am at the Front Desk, let me find the right person to support your question."
Cue it up: Before transferring, be sure the team member knows it's coming.
Transfer with care: 'I'm transferring you now to [team member]. Have a wonderful day.'
No direct transfer: If direct transfer isn't possible give the direct line of the team member: "I cannot transfer you directly, but here is the number for [team member]."

Section 3: Specifics When Receiving Sales Calls

Callers may mention how they heard about our community, and understanding their source of information can help guide the conversation. Our Marketing Team uses a variety of channels to reach prospective residents, including:

Community events: Open houses and educational seminars
Website: Meadow Ridge website and online inquiry forms
Paid Ads: Paid online advertising like Google, news outlet sites
Local marketing: WTNH, Channel 12 TV buys, community sponsorships, radio, print
Social media: (Facebook, Instagram, LinkedIn)
Direct mail and email campaigns
Referral partners (current residents, family members, professionals)

Check the upcoming events calendar regularly and be ready to provide details about opportunities for events and open houses.

When transferring, keep in mind:

Tours, pricing, lifestyle questions, etc. = sales inquiry
If you are about to transfer: "I'd be happy to connect you with someone who can answer your questions about Meadow Ridge."
If the sales team member is unavailable, do **not** tell them the sales team member went home for the day, simply say 'They are unavailable, but I can transfer you to their voicemail so you can leave a message.
If they are not asking for a specific salesperson, always send the calls to Kim

Current Sales Team contact extensions:

Ann Sertl 406
Laura Bennett 460
Kim Picone 405

Section 4: Information to Collect for Call-Ins for the Sales Administrative Assistant

Please be sure to collect the following information:

Name of caller
Phone number and/or email
Who they are calling for (self, parent, spouse, friend)
How they heard about Meadow Ridge (website, ad, event, referral, etc.)
Summary of their inquiry (tour request, pricing, general information, etc.)
Date and time of the call
Your name or initials

Example note:
"Jane Smith called on 10/13 asking about availability and pricing for her mother. She found us online and would like a call back tomorrow morning. – K.F."

Section 5: Call Scenario Scripts

The scenarios below illustrate a common type of inquiry you may encounter during a call and suggestions on how to respond:

✅ Use positive phrases:

- "I'll be happy to check on that for you."
- "Let me connect you with the right person."

❌ Avoid:

- "I don't know." → Instead: "Let me find out for you."
- "That's not my job." → Instead: "Let me direct you to someone who can help."

#1: Scheduling a Tour

Front Desk:
"Thank you for calling Meadow Ridge. This is [your name]. How may I assist you today?"

Caller:
"Good morning, I would like to schedule a tour."

Front Desk:
"I'd be happy to help you schedule a tour. May I place you on a brief hold while I connect with a member of our sales team who can assist further?"

Caller:
"Yes."

Front Desk:
"Thank you! Please hold for just a moment."

[Call the sales team and let them know someone is inquiring about a tour. If a sales team member is available, let them know you'll be transferring [caller's name] to them.]

Front Desk (after connecting with sales):
"Thank you so much for holding. I'm now going to transfer you to [sales team member name], who will be happy to help schedule your tour. Thank you again for calling Meadow Ridge—we look forward to welcoming you to our community!"

[Transfer the call]

#2: RSVP'ing to an event—for the Sales Administrative Assistant

Sales Desk:
"Thank you for calling Meadow Ridge. This is [your name]. How may I assist you today?"

Caller:
"Good morning, I would like to RSVP to [event name]."

Sales Desk:
"That's wonderful—I'd be happy to help you RSVP. May I please have your first and last name? [wait for caller response] Will any guests be attending with you? [wait for caller response, be sure to collect the full name(s) of the guest(s)] And could you also provide your email address and the best phone number to reach you?"

Caller:
[Provides answers]

Sales Desk:
"Thank you! Just to confirm, I have [repeat name, number of guests, email, and phone number]. Is that correct?"

Caller:
[Confirms]

Sales Desk:
"Perfect—you're all set! We look forward to welcoming you to [event name] on [date/time]. Is there anything else I can assist you with today?"

[Record all RSVP details and email them to the sales team.]

#3: Family member calling

Front Desk:
"Thank you for calling Meadow Ridge. This is [your name]. How may I assist you today?"

Caller:
"I'm calling to check on my mother, Mrs. Johnson."

Front Desk:
"I'd be happy to help. May I ask your name, please?"

🔒 **If unsure whether the caller is an authorized contact, say:**
"For privacy reasons, I can connect you with the nurse or resident care office who can assist with updates."

Section 6: In-Person Interactions & Visitors

Treat every interaction as important:

- Whether it's a delivery driver or the CEO, greet everyone with the same courtesy.
- Use eye contact and smile when residents approach the desk.
- Always stand or sit upright—posture reflects attentiveness and respect.
- Inquire about where visitors parked
- Offer refreshments and create a comfortable environment

Section 7: Frequently Asked Questions

Q: How many apartments are there at Meadow Ridge?
A: Meadow Ridge is an award-winning senior living community comprised of more than 285 Independent Living apartment homes. Our on-campus health center, Ridge Crest at Meadow Ridge, offers Assisted Living, Memory Care, Rehabilitation and Skilled Nursing.

Q: Can I visit the community?
A: Absolutely! The Sales Team can schedule private tours of the campus any day of the week.

Q: What activities are available on campus?
A: Residents can engage in physical activities such as

- Pilates
- Gardening
- Swimming in the heated indoor pool
- Walking their dogs on lush trails
- Playing croquet
- Intellectual enrichment through Meadow Ridge University, foreign language courses, painting and involvement in the resident-run country store, clubs and committees. There's something for everyone to nourish their mind, body and spirit. The level of involvement is entirely up to each individual's preference.

Q: What types of residences are available at Meadow Ridge?
A: Meadow Ridge offers spacious one- and two-bedroom apartment homes with various floor plans.

Q: Is Meadow Ridge pet-friendly?
A: Yes! We welcome four-legged family members and offer various perks for them, including social events like "Yappy Hour" and our Bark Ridge Dog Park. Recently, our dog show was a tail-wagging success. Pets are an important part of what makes Meadow Ridge the height of senior living.

Q: What health services are available on campus?

A: Meadow Ridge offers on-site care through Ridge Crest, the health center on campus. It offers Assisted Living, Memory Care, Rehabilitation and Skilled Nursing.

Q: Do residents have to move to another community if they need more care?

A: No. As a Lifecare community, residents can receive increasing levels of care without leaving Meadow Ridge. As more care is needed, Independent Living residents transition to Ridge Crest which is the Health Center on the campus at Meadow Ridge.

Q: What is included in the monthly fee?

A: The monthly fee includes dining, housekeeping, maintenance, transportation, fitness programs and access to community amenities.

Complete FAQ list (see MeadowRidge.com/our-community/faq)

Section 8: Basics of Lifecare

Lifecare at Meadow Ridge offers the security of knowing your care needs will be met right here on campus, with more predictable monthly costs—even if your level of care changes in the future.

Helps protect residents from rising healthcare costs.
Offers potential tax benefits.
Provides peace of mind and stability for residents and their families.