

R The Receptionist

Your
Complete
Guide to
Visitor
Management

5 steps to making a secure,
efficient visitor management
system for your company

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Step 1: Establish Visitor Types and Procedures

Welcome!

You're probably here because you've realized that the way you handle visitors at your organization could be improved a little -- or maybe a lot.

Whether you're looking to start fresh with a completely new visitor management system or just want to improve a few things, you're in the right place. By the end of this ebook, you'll have everything you need to implement a visitor management system that's optimized for security, branding, and productivity.

Let's start with your objectives.

The Key Benefits of a Visitor Management System

What's your primary goal in implementing a visitor management system? For most people, it's to improve at least one of these things:

- **Security** - Visitor management can help protect trade secrets and maintain the confidentiality of clients and employees.
- **Safety** - Having a defined visitor management process can make sure each visitor gets necessary safety information and equipment and can help in emergency evacuations.
- **Compliance** - Visitor management systems can help demonstrate that you're following the laws that regulate your industry.
- **Productivity** - A visitor management system can boost productivity by simplifying things for your front desk staff, which frees them up to do other work. No front desk staff? A visitor management system cuts down

- visitor-related interruptions for everyone.
- **Company Image and Branding** - A streamlined and easy-to-use visitor system shows visitors that you're competent and value their time.

Usually, organizations of all sizes and in all industries have a lot to gain from improving each of these components. As we dive in to create specific procedures, it helps to keep your primary objectives at the top of your mind.

Creating Your Visitor Types

Now it's time to establish the foundation of your visitor management system: An understanding of which kinds of visits happen the most at your business.

Don't skip this step. It may seem simpler to start by creating a uniform check-in procedure for all visitors, but thinking about visitors in a generic way won't get to the heart of the myriad specific needs and situations that come up in the reception area.

Don't forget to consult with all your colleagues when creating a list of visit types, including these examples:

- **Deliveries** - Lots of visits are simply to deliver water, food, supplies, individual packages, or even legal documents.
- **Services** - People may come to your office regularly to provide services such as catering and cleaning.
- **Appointments and Meetings** - You can keep this visit type general, or split it up into specific meeting types (job interviews is an example of a type of meeting that might need its own button).
- **Staff Check In** - While most companies don't require their full-time staff to check in, it may be required of contractors, part-timers, interns, or volunteers.

Make sure to include any temporary or seasonal types of visits on the list, too

The most important thing is to get an initial working list together -- you can always revise it later.

Mocking Up Your Check-In Procedures

Next, create a check-in procedure for each type of visit you listed. Each visit type requires five decisions:

1. **What information you'll collect about the visitor** - Examples: Name, photo, visitor type/role, the company they're affiliated with, their job title, their citizenship status.
2. **What information you'll collect about their visit** - Examples: Who at your company they're visiting, the time and date of check in and check out, their security level as it pertains to your facility.
3. **Which legal documents or agreements they should sign** - Waivers, visitor agreements, and even things like non-competes, privacy policies and non-disclosure agreements could be required for certain types of visits.
4. **Who on staff should get notified when they arrive** - Perhaps everyone in the human resources department should get notified when a candidate arrives for a job interview, for example. Or, perhaps you will only notify the person he's there to meet. Either way, get the procedure in writing to prevent any confusion.
5. **Whether this type of visitor requires a badge** - Many companies completely opt out of badges. However, they can be a good security measure and a helpful way for employees to identify visitors.

You don't need to limit yourself to the ideas suggested above. Create procedures for collecting any information that might be useful for your company.

Then, take yourself through these five steps for every visitor type you listed and document the answers.

Congrats! You've just created the skeleton for your visitor management system.

Step 2: Structure and Train Your Staff

Now that you've established procedures for each type of visit, you'll need to figure out who's in charge of making sure they're carried out consistently and smoothly.

Below, we list different ways you can structure your staff when it comes to visitor management.

One of them probably describes how your office works now. However, for an optimal visitor management system, changes might be necessary -- especially if your current structure doesn't have contingencies in place.

Consider which of these is the best fit for your company's visitor management needs:

Model 1 - A dedicated, full-time receptionist

This is the best scenario: someone fully devoted to visitor management is the best way to make sure it gets the attention it deserves.

Full-time receptionists also may take care of other office tasks like answering phone calls and entering data, but their focus is on the impression your company makes in its reception area.

Full-time receptionists are often seen as "brand ambassadors" for the company. They should understand that they're making the first impression on behalf of the company and share some enthusiasm for the company's goals and values.

This Model is Best For: Companies that get lots of visitors each day and can

afford to invest in making a great impression; companies with sensitive security concerns or more complicated check-in procedures.

Have a Backup Plan: Your receptionist will need to take breaks, and will sometimes be unavailable (sick, vacation, etc.). You can designate other employees to step into the role of dedicated receptionist in these cases, or you can switch to one of the models below to fill in the gaps.

Model 2: A Receptionist-Combo-Employee

If you're like many companies, you don't have quite enough visitors or phone calls to justify hiring someone just for reception.

However, you can probably still identify someone on staff to head up visitor management. They might be in human resources, office administration, or even customer service.

Adding visitor management to an existing employee's duties can work if they're not overwhelmed with other responsibilities.

This Model is Best for: Businesses who have several visitors each day (but not so many that the receptionist can't complete other work); businesses who frequently host clients who are valuable to the business and who expect to be greeted in person.

Have a Backup Plan: In this model, the designated front desk manager may often get pulled into meetings or involved in projects that take them away from the desk. Consider splitting visitor management duties among at least a few staffers, or plan to use one of the following models when they're not available.

Model 3: The Group Effort

If no one on your team seems particularly suited to the duty of visitor management or has the time to dedicate to it, individual employees can manage their own visitors.

Of course, the group will have to decide on workflows and procedures together to make sure everyone is on the same page before they go on to manage their visitors individually.

This Model is Best for: Small companies in tucked-away offices that don't get much foot traffic or solicitation. Companies that have minimal security concerns and a simple check-in procedure.

Have a Backup Plan: We all have great intentions of meeting our visitors up front, but sometimes it doesn't happen (we forget, meetings run over, visitors show up at the wrong time, etc.) For the "group effort" model to work, employees need to give any scheduled visitors instructions about what to do when they arrive and how to contact them. It's also courteous to keep the rest of the office in the loop about visitors so no one is startled to find a stranger at the water cooler.

Model 4: The Unstaffed Front Desk

This is similar to the group effort option, but with a twist.

Instead of visitors hanging out in the empty lobby until their host arrives, they encounter a prominent touchscreen or tablet loaded with visitor management software.

The software should make it easy for them to check in, sign anything necessary documentation, and send messages directly to the person they came to meet. The system may also send the host a visitor photo so they know who to look for and can introduce themselves with confidence.

This Model is Best for: Businesses who want a high-tech image and whose visitors will appreciate the tool.

Have a Backup Plan: The nice thing about this model is that as long as the equipment holds up and stays charged, you don't need a backup plan. In fact, this is an ideal backup plan (or supplement) for all the other models listed.

Once you've decided which model works for you, get everyone on the same page about who's in charge of visitor management, what's expected at the front desk, and what's expected of employees who are hosting visitors.

Your internal visitor policy could make a nice addition to the employee handbook if you don't already have one.

Step 3: Choose Your Assets

Now that you have an idea of who will be in charge of the visitor management procedures you set up, it's time to start executing. Let's talk about your visitor management "infrastructure."

In order to collect visitor data, you need a physical system that works for each of the steps you created. Here are some thoughts on how to choose a tool for each job.

Sign in and sign out

In a world full of new digital tech tools and apps, a surprising number of companies still rely on paper visitor logs to track their visitors' details and coming and goings. But paper logs present more than a few problems.

The first one is privacy. Especially in certain industries (i.e., legal and healthcare), names on the check-in sheet constitute confidential information that could even be protected by law.

Old-fashioned paper sign in sheets could also disclose relationships with important consultants or clients that you'd rather keep confidential.

Several products are available now that keep paper logs more private using things like carbon paper, peel off sheets (once the visitor signs in, the line they wrote on can be easily removed and stuck on their file, for example), and even sheet covers designed to be moved down line by line.

These are improvements, but paper solutions are still inadequate compared to the power of digital tools, which generally remove the possibilities of illegible writing or seeing the names of other visitors. Plus, digital tools automatically

store critical data like visitor date and time.

Digital sign-in tools abound online. Choose one that's well-established and secure to establish your trustworthiness.

Regardless of whether your sign-in sheet is electronic or paper, consider using some of these [best practices](#): brand the sheet with your company's logo or colors and include a warm greeting near the sign in sheet and a friendly parting message near the sign out.

Data storage

Compared to paper files, digital files are more affordable, better for the environment, easier to store, and generally safer from damage or misplacement. But that doesn't stop plenty of businesses from still relying on paper to keep track of visitor data.

If that includes you, it's time to upgrade. When you choose a program to store your visitor data electronically, make sure it has these features:

- **Reports and filters** - Visitor reports can yield valuable insights about when your lobby gets the busiest, when certain types of visits tend to occur, and more. Filters enable powerful at-a-glance views of who is in the office at any moment.
- **Exportability and scheduling** - You should be able to export any set of data to CSV and PDF formats for handy printing, sharing, and storage.
- **Auto-erase** - Some companies have policies about keeping personal information for only a certain amount of time. Your software should be able to comply with these settings automatically.

Staff notifications

Talking on the phone is becoming increasingly obsolete these days, and office communication is no exception.

If your receptionist still has to pick up the phone and dial an extension to notify a colleague that their visitor has arrived, there may be a better solution.

If you're already using a staff-wide chat app such as Slack to keep everyone in the loop, you may be able to use that for visitor notifications. The best visitor management software will create these notifications automatically when the visitor signs in.

Other options for notifications that might be built into your visitor software or chat application are SMS and email notifications. Ideally, your software will make it easy to choose which notifications and intervals work best for each employee and visit type.

Document signing

Your visitor management staff will need quick, easy access to any agreements that visitors might need to sign (NDAs, waivers, and non-compete agreements, etc.).

As little as a few years ago, that might have meant keeping a stack of the printed agreements in a file folder in the desk and plenty of pens handy. These days, agreements can be signed electronically using a variety of tools and apps.

Especially in the case of these legal documents, secure storage is of the utmost importance. Make sure these documents are backed up in the cloud and that everyone knows exactly where and how to find them.

Badge printing

If you've decided to incorporate badges into the visitor management process, you'll need to make sure your staff has the ability to design the badges and print them.

The printer and paper you choose will depend a lot on the program you use for design. For more on visitor badge design, [see an entire post on the topic](#).

Ideally, the badge printer will be connected to your visitor management software or sign in sheet software so that process is automated, which saves time for your front desk staff.

Workflows

All your efforts to create systems won't mean much if your staff gets confused

about procedures or skips an important step.

Give your staff easy access to all procedures and make them very clear.

Store the procedures along with other important procedural office documents. If necessary, print them for keeping near the desk. Bonus points if there's some kind of checklist or system in place that your staff can use to note when they've finished each step.

Step 4. Review for Safety, Security and Compliance

It's time to review the procedures you've put together to make sure they're optimized for safety, security and compliance. For certain types of businesses, insecurities in the reception area could be especially dangerous, and may even be illegal.

Here are the biggest concerns in this area for any visitor management system.

Safety

When visitors check in, they might need certain instructions in order to stay safe. This may include clarification of emergency exit procedures or other safety protocols either in written or in video form. Make these a standard part of the check-in procedure.

If you use visitor badges, consider adding space to note any special needs that will help them get the assistance they need -- especially in the case of an emergency.

There's also the safety of your employees to consider. Along with keeping the front desk staffed to monitor who is coming in and out, consider adding a photo requirement to your check-in process. That can give the staff a visual alert regarding who's trying to check in.

Privacy

We already mentioned how paper sign-in logs need to hide visitor names. But you also need to protect digital information.

Put a system in place to shred and dispose of old visitor logs if necessary. As we mentioned earlier, you may also be able to set auto-delete feature for certain

intervals to comply with office privacy policy.

Your responsibilities don't stop with protecting your visitors' privacy: Sometimes it's your employees who need protection.

Don't give visitors access to any details on your employee list unless that visitor is expected by the staff. Some visitor management software has the ability to hide employee contact lists for certain types of visits, which keeps solicitors from trolling your staff's names.

Another big part of respecting your employees' privacy when it comes to visitor management is keeping the desk staffed so people don't wander into the office unannounced. Not only could visitors hear or see things that were meant to be confidential -- a situation that occurs much too often -- but your staff deserves to know when to expect strangers in the office.

Finally, there's your company's overall privacy to consider. It might be worth incorporating some non-disclosure or photography/videography policies into a visitor agreement to protect trade secrets. [For more on this topic, see the full article.](#)

Emergency Planning

The U.S. Occupational Safety and Health Administration recommends that businesses have emergency evacuation plans in place.

We go into this topic in more detail [in our blog](#), but to summarize, everyone who's in your building -- including visitors -- should know how to get out in the case of an emergency. And you should have a clear list of who is in your building at all times so you know who needs to be evacuated.

Cloud-based visitor management systems are great for this, because they let you search for visitors by date and category quickly and from any internet connected device.

Regulatory Compliance

For many companies, such as those that handle food or develop sensitive technology (aerospace, military), having specific visitor protocols is not optional. There are several laws that could apply to your business that regulate

aspects of visitor management.

Here's an overview:

ITAR

ITAR stands for International Traffic in Arms Regulations. It's a set of export control laws to prevent sensitive information from getting into the hands of foreign nationals. All manufacturers, exporters, and brokers of defense articles, defense services, and related technical data are required to be ITAR compliant. To be ITAR compliant, companies must have a documented visitor management process that involves verifying whether visitors are United States citizens. Visitors may be required to sign an ITAR NDA and a technology control plan (TCP) briefing. Companies must also maintain comprehensive visitor records. [Learn more about on the U.S. State Department website.](#)

C-TPAT compliance

The Customs-Trade Partnership Against Terrorism (C-TPAT) is a U.S. Customs and Border Protection (CBP) program to ensure the safety of all goods entering the United States. C-TPAT is like TSA Precheck for containers arriving in the United States from foreign suppliers. Under this voluntary program, importers are responsible for implementing best practices for security across their supply chain so that they don't run into any problems when the goods arrive at the border. Like ITAR, C-TPAT involves several processes, but its foundation is visitor management. The required best practices include taking photos of all visitors, issuing ID badges, and keeping records in a visitor database. [Learn more at C-TPAT on the U.S. Customs and Border Protection website.](#)

FSMA compliance

If you're in the food industry, you've undoubtedly heard of the Food Safety Modernization Act (FSMA). These seven FDA rules set a new bar for food safety practices and procedures. Like the other regulations on this list, the Food Defense Rule has many aspects, including requirements for visitor management that include a check-in/check-out procedure at security or reception areas that includes verification of proper identification, screening equipment, and relinquishment of prohibited items; a visitor policy which requires proper identification, escorts, and adherence to rules regarding restricted access, a

policy for driver check-in and vehicle documentation review. [Learn more about the Food Defense rule on the FDA website.](#)

FedRAMP compliance

The Federal Risk and Authorization Management Program (FedRAMP) spells out the set of privacy and security protocols that businesses need to follow if they want to host government data. These include lots of technical specifications for the equipment and software, but there are plenty of requirements for non-tech internal procedures, too. Some of these regulations specify staff security training, authorization procedures for people who have access to the system, incident response training, and handling departing personnel. At FedRAMP-compliant facilities, all physical access must be monitored, and logs of those visits must be reviewed at least monthly and maintained for at least a year. These companies also need records that people given access a sensitive area have read and understand role-appropriate rules.

Rules and regulations may change, but being on the more secure end of visitor management can only help your business. Taking extra security precautions now may also go a long way toward getting you ready for any security regulations that come up for your industry in the future.

Step 5. Review for Usability and Branding

You're almost finished with your visitor management system.

However, it will only be successful if it's easy and pleasant to use for both visitors and staff -- and it will only work as a branding tool if you take the time to consider whether it reflects your company's values.

Take these steps to make sure your visitor management system is aligned with the best interests of both its users and your company.

Test for Usability for Each Visitor Type

Review the types of visits you used to create your procedures and give some more thought to who exactly visits your business.

Ever heard of [customer personas](#)? Think of some visitor personas. Then, ask yourself if there's anything you could do to make check-in easier or more pleasant for each particular visitor.

Once you've done that, it's time for some real-life testing. Have visitors check in with your new system and monitor how things go. If you're using visitor-facing check-in software but your visitors can't figure out how to use it on their own, it might be too complicated. Simplify the process until you don't get as many questions.

Get Buy-In From Your Staff

It's not just the visitors who require great usability. Any successful visitor management system absolutely requires buy-in from the staff, too. They'll use it

just as much as the visitors -- and sometimes even more.

When you give your new system a test run, you should also be assessing how your front staff likes it.

For example, if your program requires “training” on the staff end, it probably won’t be welcomed with open arms. Today’s SaaS products are simple and niche enough that most computer-savvy people can pick them up on their own. If they can’t, it’s not a good sign.

Keep modifying as necessary. Your visitor management process should be considered a living system, not a one-and-done task.

If your procedures or tools are too annoying to use, your employees will start skipping steps at every opportunity -- putting you back at square one. That’s why it’s worth taking the time to invest in a system that your employees will appreciate and look forward to using.

Usability Checklist for Visitor Management Software

If you’re considering using a software solution, either to assist your front desk staff or as a standalone check-in system, there are a few things you should look for:

- **Simple, button-based screens** - Buttons for each option make things simple, clear, and readable for each step of the check-in process.
- **Automated workflows for each visitor type** - A system that takes visitors through the steps you already set out eliminates the chance of error and alleviates tedium from front desk workers.
- **Easy WYSIWYG editors** - Drag-and-drop editors that anyone on staff (certainly not just designers) can use for screens and badges are a must-have.
- **Shortcuts for certain visitors** - Returning visitor functionality and pre-registered visitor functionality means that people who come in regularly can simply approve their info instead of entering it all each time.

Review Your Brand and Mission

Now that you've considered usability, take a moment to review your brand identity and company mission. Just like anything else in your company, make sure visitor experience reflects your brand values.

Here are a few suggestions:

- **Visual Branding** - Have you incorporated your logo, brand imagery, and colors everywhere you can, such as on welcome screens and sign-in sheets?
- **Language and Tone** - Does the language used in reception reflect the tone that you use throughout the rest of your client-facing copy? For example, a company that wants to come off very professionally might stick with simple, direct labels for their intake forms, but a company that values friendliness might try something for a field like "Hi there! What's your name?" instead of the simple "Name" label.
- **Values** - Does the check-in system generally reflect the values of your company? If you're trying to present an image that's cutting edge and modern but are using a paper sign in with manual visitor tags, that's a branding conflict. Along the same lines, an unmanned iPad may not reflect the values and needs of a senior living facility or an elementary school.

When visitors check in to your facility, the system they use should look and feel uniquely your own, not something you've essentially borrowed from someone else. Remember, it's all part of making a great first impression that can pay off big time for your company.

How The Receptionist for iPad Handles Visitor Management

So, you've reviewed your visitor management system, have optimized its potential for security, and checked its usability and its consistency with your brand. You also have an idea of what people and equipment you need to get things going.

Are you ready to put it all together?

We have some good news: [The Receptionist for iPad](#) was designed to put a complete and automated visitor management system together for you.

The Receptionist for iPad guides you through the steps of creating visit types and custom procedures for each, including editable fields and legal agreements. It has a robust reporting system and all the features for security, usability and branding that we've suggested in in this Ebook. It also integrates seamlessly with a badge editor and printer.

One feature that we're particularly proud of is the ability to get as customized as you want with staff notifications, which may include SMS, email, or even Slack pings at custom intervals after client check-in. You can choose to notify a whole group or certain individuals, and even designate back-up employees for those notifications in case the first employee doesn't respond.

As we mentioned, all these features keep your company more safe, secure, and may even help you comply with legal regulations. If that weren't enough, they also boost productivity for all your employees by making check-in faster and easier and reducing errors and unnecessary interruptions.

At The Receptionist, one of our crowning achievements is our dedication to RadicalService for our customers. We've installed a chat box on every screen of

your software so you can get in touch with us quickly and easily at any time, and our attentiveness to user concerns is something that our customers rave about.

Plus, with The Receptionist for iPad, all features and unlimited customer support are included in every plan, even the free 14-day trial. Ready to see it for yourself? [Start your trial](#), or [contact us](#) for more information.

Here are just a few testimonials about The Receptionist for iPad from our happy clients (source: [Capterra](#)).

"We have been very happy with the service. It has allowed our receptionist to step away when needed. We are extremely happy with the amount of customizable options. We have many large meetings and training conferences and this allows us to set up specific sign in buttons that keep track of who came, what time they arrived and how long they were in the facility. The report option has been incredibly helpful to keep paper trail down and able to keep things electronically." Tanya M., Autoneum

"The Receptionist is simple and easy for our customers to use. Love the customizations and the customer service I am provided when I do need to contact someone. They are always friendly and issues are fixed usually within less than a five minute time frame." -- Crystal C., ReTeck

"Fantastic! Makes my job so much easier! I like the ease of use and the customization options. Also, the customer support is amazing. They are quick to answer and so helpful. -- Renae B., MTI

Ready to get started? [Click here to start a free 14-day trial](#), or [contact us](#) for more information.

Questions and Answers about The Receptionist for iPad

Still have questions? We can help. Here are a few questions that tend to cross the mind of people who are considering trying out our visitor management software.

Is this program designed to replace your receptionist?

No way! We recently wrote a [detailed response](#) to this very question. In short, we want to be your receptionist's most valuable asset. We are certain there are other things going on in your office, and being tied to a desk is no one's favorite responsibility. The Receptionist gives your office manager, front desk person, welcoming committee, or "the person nearest the door" the freedom to tackle other tasks while we keep your entry area running smoothly.

What physical equipment do I need to make this work?

In short, you need an iPad and an iPad stand (either for the desk or the floor), and you may also want a badge printer. We've made it as easy as possible for companies to get the equipment they need with our [Receptionist in a Box](#).

You can also use your own iPad if it runs on iOS 8.0 or higher. This includes the iPad Mini, iPad Mini 2, iPad 2, 3, 4, iPad Air, iPad Air 2, and iPad Pro. No Android tablets are supported at this time -- but we've found that most companies prefer to buy a new, dedicated tablet for their reception area anyway.

You can update The Receptionist for iPad's settings (along with all your account details) from any internet-connected computer via [TheReceptionist.com](#). Only a

few settings need to be updated using the tablet itself.

Is support included?

Absolutely. We want to show you how much we care, and the best way to do that is to be here when you need us. We believe that we have the easiest, fastest set up on the market. To prove it, we offer free unlimited support (even during your free trial) to answer any questions you have.

How much does The Receptionist for iPad cost?

We charge per month, per location. The only difference between plans is the number of people at your location who are registered in the system to receive visitors.

Plans are currently \$49/month for up to 24 registered employees, \$99 for up to 49 registered employees, and \$149 for up to 99 registered employees. If you opt to pay for the whole year, you get one month free.

For more details or if you have more than 99 registered employees, check out our [pricing page](#).

Do I have to sign a long-term contract?

After the free, 14-day trial, each level of pricing is available on a month-to-month basis, and you can cancel at any time.

Heard enough? [Click here to start a free 14-day trial](#), or [contact us](#) for more information.

We hope you've enjoyed this Ebook, and we hope to hear from you soon.

Andy & the Team at [The Receptionist](#)

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Looking for a turn-key visitor management solution?

Increase efficiency, improve security
and compliance, and free up staff.

[Try the Receptionist for iPad](#)