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## **ADMINISTRATIVE/PERSONAL ASSISTANT & SECRETARIAL DUTIES**

### **STUDY GUIDE FOR MODULE ONE**

(A full 'Study & Training Guide' will accompany the Study or Training Manual(s) you will receive soon by airmail post.)

This Study Guide - like all our Training Materials - has been written by professionals; experts in the Training of well over three million ambitious men and women in countries all over the world. It is therefore essential that you:-

- \* Read this **Study Guide** carefully and thoroughly BEFORE you start to read and study Module One, which is the first '**Study Section**' of a CIC Study or Training Manual you will receive for the Program for which you have been enrolled.
- \* Follow the **Study Guide** exactly, stage by stage and step by step - if you fail to do so, you might not succeed in your Training or pass the Examination for the CIC Certificate or Diploma.

#### **\* STAGE ONE**

Learning how to **really STUDY** the College's Study or Training Manual(s) provided - including THOROUGHLY READING this **Study Guide**, and the full '**Study & Training Guide**' which you will soon receive by airmail post.

#### **\* STAGE TWO**

Studying in accordance with the professional advice and instructions given.

#### **\* STAGE THREE**

Answering Self-Assessment Test Questions/Exercises.

#### **\* STAGE FOUR**

Assessing - or having someone assess for you - the standard of your answers to the Self-Assessment Test/Exercises.

#### **\* STAGE FIVE**

Preparing for your Final Examination.

#### **\* STAGE SIX**

Sitting the Final Examination.

Remember: your CIC Program has been **planned** by experts. To be certain of gaining the greatest benefit from the Program, it is **essential** that you follow precisely each one of the **SIX stages** in the Program, as described above.

**STAGE ONE** is your thorough reading of this 'Study Guide'



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## **ABOUT CIC STUDY and TRAINING MANUALS**

A CIC Study or Training Manual (which comprises 4 or 6 Modules - the first Module of which follows) supplied by the College as part of your Course or Program is **NOT** simply a text book. It must therefore **not** be read simply from cover to cover like a text book or another publication. It **MUST** be **studied**, Module by Module, exactly as explained in the following pages. Each CIC Study or Training Manual has been designed and written by specialists, with wide experience of teaching people in countries all over the world to become managers, administrators, supervisors, sales and accounting personnel, business-people, and professionals in many other fields.

Therefore, it is in **your own best interests** that you use the Study or Training Manuals in the way CIC's experts recommend. By doing so, you should be able to learn easily and enjoyably, and master the contents of the Manuals in a relatively short period of time - and then sit the Final Examination with confidence. Every Study Manual and Training Manual is written in clear and easy to understand English, and the meanings of any "uncommon" words, with which you might not be familiar, are fully explained; so you should not encounter any problems in your Studies and Training.

But should you fail to fully grasp anything - after making a thorough and genuine attempt to understand the text - you will be welcome to write to the College for assistance. You must state the **exact** page number(s) in the Study or Training Manual, the paragraph(s) and line(s) which you do not understand. If you do not give full details of a problem, our Tutors will be unable to assist you, and your Training will be delayed unnecessarily.

Start now by reading **carefully** the following pages about Stages Two, Three and Four. Do **NOT**, however, start studying the first Study or Training Manual until you are **certain** you understand **how** you are to do so.

## **STAGE TWO - STUDYING A CIC MODULE**

### **STEP 1**

Once you have read page 1 of this document fully and carefully, turn to the first **study section** - called **Module One** - of **Study or Training Manual One**. (Note: In some Manuals the term "Chapter" is used instead of "Module").

Read the whole of Module One at your normal reading pace, without trying to memorise every topic covered or fact stated, but trying to get "the feel" of what is dealt with in the Module as a whole.

### **STEP 2**

Start reading the Module again from the beginning, this time reading more slowly, paragraph by paragraph and section by section. Make brief notes of any points, sentences, paragraphs or sections which you feel need your further study, consideration or thought. Try to absorb and memorise all the important topics covered in the Module.

### **STEP 3**

Start reading the Module again from its start, this time paying particular attention to - and if necessary studying more thoroughly - those parts which were the subject of your earlier notes. It is best that you do **not** pass on to other parts or topics until you are **certain** you fully understand and remember those parts you earlier noted as requiring your special attention. Try to fix everything taught firmly in your mind.

**Note:** You may not wish to, or be able to, carry out Steps 1, 2 and 3 one after the other. You could,

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for instance, carry out Steps 1 and 2 and then take Step 3 after a break.

## **STAGE THREE - ANSWERING SELF-ASSESSMENT TESTS**

### **STEP 4**

When you feel that you have **fully understood and learned everything** taught in the whole Module (and if necessary after a further careful read through it) turn to the Self-Assessment Test set at the end of it, and read the Questions/Exercises in it carefully. You do not have to attempt to answer any or all of the Questions/Exercises in the Test, but it is **best** that you do so, to the best of your abilities. The reasons for this are:-

- ❁ By comparing your answers with the Recommended Answers printed in the Appendix at the end of the Module, you will be able to assess whether you **really have** mastered everything taught in the Module, or whether you need to study again any part or parts of it.
- ❁ By answering Questions/Exercises and then comparing your attempts with the Recommended Answers, you will gain experience - and confidence - in attempting Test and Final Examination Questions/Exercises in the future. Treat the Self-Assessment Tests as being “*Past Examination Papers*”.

### **Professional Advice on Answering Self-Assessment Test (and Examination) Questions and Exercises**

1. You may answer the Questions/Exercises in a Self-Assessment Test in any order you like, but it is best that you attempt **all** of them.
2. Read very carefully the first Question/Exercise you select, to be quite **certain** that you really **understand** it and what it requires **you to do**, because:
  - ★ some Questions/Exercises might require you to give full “written” answers;
  - ★ some Questions/Exercises (e.g. in English) might require you to fill in blank spaces in sentences;
  - ★ some Questions/Exercises (e.g. in bookkeeping) might require you to provide “worked” solutions;
  - ★ some Questions/Exercises (called “multiple-choice questions”) might require you only to place ticks in boxes  against correct/incorrect statements.

In your Final Examination you could **lose marks** if you attempt a Question/Exercise in the wrong way, or if you misread and/or misunderstand a Question/Exercise and write about something which is not relevant or required.

3. Try to answer the Question/Exercise under ‘**true Test or Examination conditions**’, that is, **WITHOUT** referring back to the relevant section or pages of the Module or to any notes you have made - and certainly **WITHOUT** referring to the Recommended Answers. Try to limit to about two hours the time you spend on answering a set of Questions/Exercises; in your Final Examination you will have **only two hours**.
4. Although you are going to check your Self-Assessment Test answers yourself (or have a friend, relative or colleague assess them for you) practise writing “written” answers:-

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★ in clear, easy-to-read handwriting;

and

★ in good, grammatical language.

The Examiner who assesses your Final Examination answers will take into account that English might not be your national or main language. Nevertheless, to be able to assess whether you really **have** learned what we have taught you, he or she will need to be able to read and understand what you have written. You could lose marks if the Examiner cannot read or understand easily what you have written.

5. Pay particular attention to neatness and to layout, to spelling and to punctuation.
6. When “written” answers are required, make sure what you write is **relevant** to the Question/Exercise, and concentrate on **quality** - demonstrating your knowledge and understanding of facts, techniques, theories, etc. - rather than on quantity alone. Write fully and clearly, but **to the point**. If you write long, rambling Final Examination answers, you will waste time, and the Examiner will deduct marks; so practise the **right** way!
7. When you have finished writing your answer, read through what you have written to see whether you have left out anything, and whether you can spot - and correct - any errors or omissions you might have made.  
**Warning:** some Questions/Exercises comprise two or more parts; make **certain** you have answered **all** parts.
8. Attempt the next Question/Exercise in the Self-Assessment Test in the same manner as we have explained in 1 to 7 above, and so on until all the Questions/Exercises in the Test have been attempted.

**Note:** There is no limit on how much time you spend on studying a Module before answering the Self-Assessment Test set on it, and some Modules are, of course, longer than others. You will, however, normally need to spend between twelve and fifteen hours on the thorough study of each Module - and that time may be spread over a number of days if necessary - plus approximately two hours on answering the Self-Assessment Test on each Module.

## **STAGE FOUR - ASSESSING YOUR ANSWERS**

### **STEP 5**

When you have answered all the Questions/Exercises set in Self-Assessment Test One to the best of your ability, compare them (or ask a friend, relative or a colleague/senior at work to compare them) with the Recommended Answers to that Test, printed in the Appendix at the end of the Module. In any case, you should thoroughly study the Recommended Answers because:-

★ As already explained, they will help you to assess whether you have really understood everything taught in the Module;

and

★ They will teach you how the Questions/Exercises in subsequent Self-Assessment Tests and in your Final Examination **should** be answered: clearly, accurately and factually (with suitable examples when necessary), and how they should be laid out for maximum effect and marks.

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## MARKS AND AWARDS

To assist in the assessment and grading of your answers, the **maximum number of marks** which can be earned for each answer to a Self-Assessment Test Question/Exercise is stated, either in brackets at the **end of each one**.

**The maximum number of marks for any one Test is 100.**

Your answers should be assessed fairly and critically. Marks should be awarded for **facts** included in your answer to a Question/Exercise, for presentation and for neatness. It is **not**, of course, to be expected that your answers will be identical to all those in the Appendix. However, your answers should contain the **same facts**, although they might be given in a different order or sequence - and any examples you give should be as appropriate to the Questions/Exercises as those given in the relevant "Recommended" Answers.

Add together the marks awarded for all your answers to the Questions/Exercises in a Self-Assessment Test, and enter the total (out of 100) in the "Award" column in the **Progress Chart** in the middle of the full '**Study & Training Guide**' when you receive it. Also enter in the "Matters Requiring Further Study" column the number(s) of any Question(s)/Exercise(s) for which you did not achieve high marks.

## GRADES

Here is a guide to the grade your Self-Assessment Test Work has achieved, based on the number of marks awarded for it:

50% to 59%	PASS	60% to 64%	HIGH PASS
65% to 74%	MERIT	75% to 84%	HIGH MERIT
85% to 94%	DISTINCTION	95% to 100%	HIGH DISTINCTION

## STEP 6

Study again **thoroughly** the section(s) of the Module relating to the Question(s)/Exercise(s) to which your answers did not merit high marks. It is important that you understand where or why you went wrong, so that you will not make the same mistake(s) again.

## STEP 7

When you receive the complete Study or Training Manual One\*\* from the College by airmail post, '**revise**' - study again - Module One printed in it, and then turn to **Module Two** and proceed to **study it thoroughly** in exactly the same way as explained in Steps 1, 2 and 3 in this '**Study Guide**'.

When you have completed your **thorough study**, follow steps 4, 5 and 6 for the **Self-Assessment Test on Module 2**.

Continue in the **same way with each of Modules 3, 4, 5 and 6** until you have attempted and assessed your work to Self-Assessment Test 6, and have completed the study of Study or Training Manual One. But - and this is **important** - study the Modules **one by one**; complete Steps 1 to 6 on **each** Module **before** you proceed to the next one (unless during the course of your reading you are referred to another Module).

**\*\*Note:** When you receive Study or Training Manual One by airmail post, it will be accompanied by a 20-page '**Study & Training Guide**' (containing a '**Progress Chart**') which you **MUST read very carefully** before starting your study of Module Two.

## TRAINING ON

# ADMINISTRATIVE/ PERSONAL ASSISTANT & SECRETARIAL DUTIES

## Module One

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# THE PERSONAL ASSISTANT AND THE PRIVATE SECRETARY

## Introduction - The Need for Executive Assistance

The more senior the position of an executive in an enterprise, the more necessary it is for him (or her)\*\* to be able to concentrate on performing well the most important tasks included in his (or her)\*\* job. That job might involve the management of a section or department of the enterprise, or the enterprise as a whole. In any event, the standard of his performance of his job can affect - favourably or adversely - the success and prosperity of the enterprise.

Clearly, the more efficiently and effectively the executive performs the important tasks involved in his work - which, perhaps, only he (or she)\*\* can perform - the greater will be the benefit to the enterprise by which he is employed, or which he might even wholly or partly own. He should be able to concentrate on those important tasks if he is **relieved** of some other tasks involved in his job which - whilst still **needing** to be performed - can in reality be performed by somebody else on his behalf or under his supervision. In other words, the executive needs **assistance**, and that will be provided by **an assistant** (or more than one).

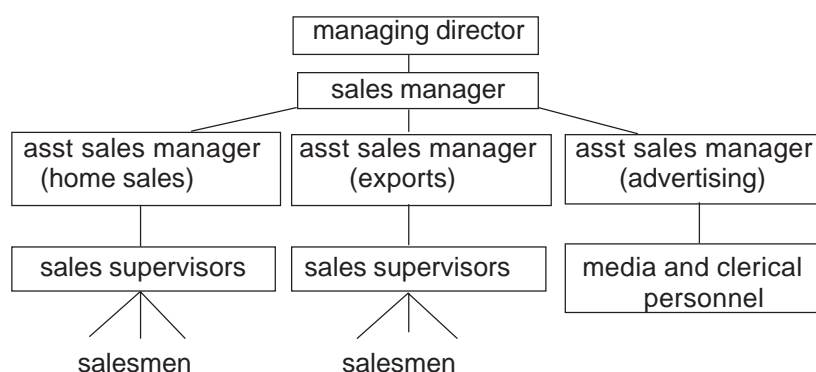
**\*\* Note:** To avoid repeating the words "him or her", "his or her", "he and she", and for convenience only, we refer to an executive (using the pronouns "him", "his" and "he") as being male; no offence is intended to female executives.

## Types of Assistants

There are different types of assistants. For example, an enterprise might have a sales manager and an assistant sales manager (or more than one); a college might have a principal and a deputy principal (or more than one). In each of those examples, the executives will in all probability perform closely related, but **different**, work; the sales executives will all be concerned with different aspects of selling the products in which the business deals; the college's executives will all be concerned with different aspects of its administration.

The assistant manager(s) and deputy principal(s) will no doubt have staff subordinate to them, over whom they have executive authority, and for whose work performance they are responsible. The organisation of the sales department of the business concerned might look as shown in Fig.1/1.

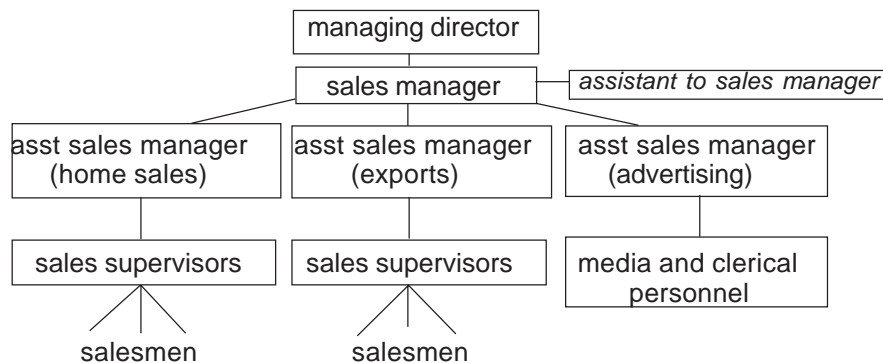
**Fig.1/1.** Possible organisation of the sales department of an enterprise



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However, this Program is concerned with assistants who work closely with specific executives to whom they are assigned - to **assist those** executives perform their work. Such people are assistants TO the executives concerned; and the description '**personal assistant**' is very apt in most cases. In general, these assistants TO executives have NO authority over - or responsibility for - other staff working in those executives' sections, departments or enterprises. Compare Fig.1/2 with Fig.1/1, and notice that the position of the assistant **to** the sales manager is very different from that of an assistant sales manager.

**Fig.1/2.** Possible organisation of the sales department of an enterprise



You can see that in Fig.1/1 the sales manager, whilst being subordinate to and responsible to the managing director, has responsibility for and authority over the assistant sales managers - and their subordinates. The assistant sales managers have authority over the sales supervisors and the salesmen, whilst the sales supervisors have authority over their teams of salesmen.

But in Fig.1/2, the assistant to the sales manager is responsible **ONLY** to the sales manager (and his senior, the managing director) and has **NO** authority over, or responsibility for, any other staff in the sales department. We can therefore say that, in general, an assistant to an executive holds a **non-executive** position. (There can be exceptions, as some personal assistants might have authority over clerical staff - see Module 12.)

## **Personal Assistants and Private Secretaries**

Although the term '**personal assistant**' - or '**PA**' - has been in use for many years, it has been very much more common for such an assistant to be referred to as a '**secretary**' or as a '**private secretary**'.

However, over the years, the word '**secretary**' has gradually come to be used as a generalised description of many different people who perform work in an office environment. Although the work they perform might vary considerably from organization to organization, in general it is of a **clerical nature**. Indeed, many of the personnel concerned are in reality no more than office clerks - although perhaps senior and experienced ones - and they are given the "courtesy" or "honorary" title of *secretary*.

Similarly, many office personnel who are actually shorthand-typists or stenographers, audio-typists or even only copy-typists might be referred to as "secretaries" (this trend of using more dignified job titles can be seen in other fields too; for example dustmen are now often called "refuse collectors".)

In recognition of the increasingly important roles played in many enterprises by assistants to executives, the descriptions '**administrative assistant**' and '**executive assistant**' are being used

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far more widely today, and it is likely that the trend will accelerate. We cannot, of course, say what descriptions you will come across - or be designated - during your career, and circumstances differ from country to country and from enterprise to enterprise.

In this Program we shall use the designations **personal assistant** or **PA** and **private secretary** - or for simplicity just **'secretary'**. But when we use either of these designations we shall be referring to a person who is **much more** than simply a typist, a shorthand-typist or an office clerk (with no disrespect intended to such people, whose work is also important, and who in any case are often themselves potential PAs/private secretaries.)

Before going further, three other points need clarification:-

1. Probably, the majority of personal assistants/private secretaries are female, but there are many who are male; merely for convenience in this Training Program the words "she" and "her" are often used when referring to a PA/secretary - instead of the rather cumbersome expressions "he or she" and "his or her".
2. In many cases the executive (or executives) to whom a PA/private secretary might be assigned - often referred to as her **'boss'** - is male, there are increasing numbers of female executives. As already mentioned, and merely for the sake of convenience, the words "he" and "his" and "him" are used frequently in this Program when referring to an executive, to avoid our repeating the cumbersome terms "he or she" and "his or her".
3. We use the term "type" to refer either to the production of letters and other documents using a **keyboard**, whether that is on a "traditional" typewriter, on a word processor, or linked to a computer.

### ***The PA/Private Secretary and other Office Personnel***

A clerk or a typist performs work for an enterprise - or a section or department of it - **as a whole**. In contrast, the duties of a PA/private secretary - despite being employed by the **same** enterprise - are concerned mainly with easing the workload of **one particular person** in the enterprise: her **'boss'**, the executive to whom she has been assigned or by whom she is employed.

Those duties, including perhaps taking dictation and typing, might include some or all of the following:-

- ❁ communicating orally or in writing - using telephones, fax machines, e-mail, computers, scanning, drafting letters, memos and other documents;
- ❁ making appointments, receiving visitors;
- ❁ dealing with incoming and outgoing mail;
- ❁ checking and paying bills;
- ❁ keeping petty cash and accounts;
- ❁ supervising office personnel;

and much more, depending on the size and activities of the employing enterprise, and the position of her boss within it. We look at all these duties, and others, during this Program.

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As we have seen, the description **personal assistant** is very apt, because that is exactly what she is - a personal assistant to the executive(s) to whom she is assigned.

As personal assistant, she needs a good knowledge and understanding of the duties which her boss is expected to perform. That is because her basic function is to act as his **'working partner'** or **'complement'** in the performance of those duties, and the tasks which are involved. She also often has to assist him in decision-making, or she is at the very least required to obtain or supply information or data upon which he will base his decisions.

An essential aspect of a personal assistant's job - the importance of which is too often underrated - is to relieve her boss of many "routine" or "mundane" business tasks - in order to leave him freer to concentrate on more important or more pressing business matters. At the same time she needs to be able to "complement" her boss; to overcome weaknesses or shortcomings he has which could prevent the most successful performance of his duties. To take a simple example, if her boss is weak in spelling, she must ensure that her own spelling is word-perfect so that she can correct any errors he makes. Similarly, if he is forgetful with regard to times, she must ensure that she reminds him of meetings he has to attend or appointments he must keep.

### **The PA-Boss Working 'Partnership'**

The ideal working relationship between a PA or private secretary and her assigned boss is a **'partnership'**. Each "partner" needs to understand the other - their individual characters, their duties and responsibilities, their skills and talents and abilities, their limitations or shortcomings, and so on, with each attempting (frequently without conscious thought) to complement and adapt to the other, to provide an **efficient** working partnership. Of course, the ideal is one thing, whilst the reality is very often quite another matter; and unfortunately it is all too often the PA who is expected to do most of the understanding and adapting, being looked upon as the "junior" partner.

It is dangerous to categorise the executives to whom PAs/secretaries might be assigned simply as **'bosses'**, because every single executive will be different, with his or her own personality, character, temperament, likes and dislikes, preferences and prejudices, talents, skills, abilities, strengths and weaknesses, and so on.

The requirements and expectations of executives from their PAs/private secretaries also vary according to their characters. Some executives are - or like to think they are - self-reliant and need little if any help or advice; often, that is, until their PAs/secretaries are away ill or on holiday/vacation! There are other executives who are too embarrassed to ask for help; their PAs/secretaries need to be able to spot quickly when and what help is needed, and to take the necessary action, often unobtrusively, without being asked. Yet other executives attempt to off-load onto their PAs/secretaries as much as possible; those PAs/secretaries must firmly but tactfully ensure that work and responsibility are **evenly** shared between the "partners".

It can therefore be seen that in the main it is the PA/secretary who is expected to "meld" - to merge or to blend in - with her boss, rather than the other way around. That is not always easy for her to do, for a number of reasons, not the least of which involve her own character and temperament and abilities, her own ambitions, etc. However, with patience and tact and understanding, an effective working relationship can generally be formed with even the most "difficult" of bosses.

Naturally there are bound to be some failures, as two people with very different characters - or conversely with very similar characters - might not be able to avoid what are called **"personality clashes"**, however hard they might try not to provoke each other. When this occurs, in order to minimise distress it is best that the partnership is quickly "dissolved". The PA/secretary concerned must try to find herself another position, within the same organization or in another, and she should

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not blame herself for the failure so long as she knows that she **did** try her best to make the partnership work.

There are situations in which one PA/secretary works for and with **two or more** executives at the same time. Great care and tact are necessary, particularly if the executives are of different levels of seniority, or if relations between them are strained, to ensure that the secretary does not find herself “in the middle” or in awkward situations.

### **PA and Secretarial Posts**

Just as there is no one “standard” boss and there is no one “standard” PA/secretary, there is no one “standard” PA/secretarial position or post. Every single PA/secretarial post will be **unique**. That is because not only will the actual PA/secretarial work differ, but because the various “characters” involved - the PA/secretary herself, the executive(s), their colleagues and associates, customers/clients and suppliers and other contacts - will all differ, and all will have some bearing on what is involved in a post and how the work concerned needs to be performed. The differences between PA/secretarial posts might be minor or major, but they **will** exist.

In this Program we examine a wide range of activities in which PAs/private secretaries **might** be involved; but it is quite impossible for us to state what activities or duties will actually be involved in a specific post. The duties which a particular PA/private secretary will be expected to perform will vary - perhaps considerably - at different stages during her career. Not only might she change employers, but she might be transferred or promoted internally within an employing enterprise, one boss might leave the enterprise or be promoted or transferred and be replaced by another person, the work of a section or department might be expanded or contracted or otherwise changed, and so on; there are many, many possibilities.

And, of course, as a PA/secretary matures and gains experience and knowledge, she should be able to undertake a greater variety of work, and assume greater responsibilities.

The point is that any PA/secretary must appreciate that her circumstances - her duties and even the executive with whom she must work closely - can sometimes change at short notice, perhaps with little warning. She needs to be able to **adapt** to changing circumstances as and when they occur, and the duties to be performed, smoothly and efficiently if she is to make a success of her career.

What is looked upon as being “career success” might vary from individual to individual. To some people, the measure of success is merely the value of the financial rewards received, whilst others also seek what is often called “job satisfaction” - performing jobs which they enjoy and which they feel are worthwhile. Other people seek promotion to more senior posts, not only perhaps for the financial rewards and fringe benefits such advancement brings, but also for the prestige and status which comes with it - such as might perhaps accrue to the “PA/secretary to the managing director”, for example.

Yet other people strive to secure promotion because they enjoy accepting greater responsibility, or revel in authority and in managing others, or because they must simply satisfy some inner urge to “get ahead”. There are increasing numbers of people, too, who today see successful careers in PA/secretarial posts as their best paths to executive posts - in business in particular.

The very fact that you have embarked on PA/secretarial training by studying this Program, shows that you are intent on making a success of your career in PA/secretarial work, by whatever terms you might gauge that success. It is therefore necessary for us to look now at some of the personal “attributes” which you will need to possess or to develop if you are to have the best chances of achieving that success.

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## **Personal Attributes Needed for PA/Secretarial Success**

Not every desirable “attribute” we now describe in the following sections necessarily applies to every person who holds, or intends to hold, a PA/private secretarial position, but all should be borne in mind as many will be looked for in those being considered (for example during interviews) as candidates for employment and/or promotion in PA/private secretarial posts.

### **Appearance**

It is important for a PA/secretary to present an **attractive** and **pleasing** appearance so she creates a good impression on all with whom she comes into contact during the course of her duties. A PA/secretary might be the first person with whom a visitor comes into contact, and if she creates a **good impression**, that will reflect favourably on her boss and even on the enterprise.

By “attractive” we do not mean “beauty” as, contrary to popular belief as portrayed by some cartoonists in particular, the majority of executives do not seek “sexily” or flashily/scantily attired PAs/secretaries! Most executives prefer PAs/secretaries who are always **neatly** and **tastefully** dressed in keeping with their organizations’ policies and the prevailing climatic conditions.

A PA/secretary whose duties include dealing with visitors (who might be potential and existing clients/customers, suppliers, etc) will usually be expected to dress in a manner which will enhance the image which her boss, his section or department or the enterprise as a whole wishes to convey: modern, conservative, dignified, efficient, unruffled, and so on, as appropriate. On the other hand, PAs/secretaries who have little if any contact with “external” personnel might be permitted to wear somewhat more casual clothes, within reason. Whatever is worn must, however, always be clean, neat and tidy and well pressed.

A PA/secretary’s hair must be clean and well-groomed at all times, and she should avoid extremes of fashion. She should also pay attention to her finger nails; dirty or badly bitten finger nails are **not** attractive, whilst overlong nails can interfere with typing and with the efficient operation of other office machines and equipment, such as computer keyboards. Particular attention must, of course, be paid to personal hygiene at all times.

**Note:** As explained earlier, we are referring in this Program to PAs/secretaries as mainly being female. However, in this instance it is necessary to mention that the choice of apparel suitable for male secretaries might be limited, either by convention, e.g. neckties and in some cases even waistcoats might have to be worn, or by climatic conditions. Nevertheless, neat and tidy appearances are still very important, as is attention to the grooming of hair and to shaving or to the grooming of any facial hair worn.

### **Personality**

A pleasing personality is usually most important, as **every** PA/secretary will need to maintain good and amicable relations with many different people, in addition to her immediate boss or bosses, of course.

Some PAs/secretaries do work for “one-man businesses”, but in most situations a PA/secretary needs to have contact with other personnel of the organization by which she is employed, some of whom will be senior in status to her (and perhaps even senior to her boss) whilst others might be junior to her, and some might be PAs/secretaries to other executives and thus be of more or less equivalent status to her.

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In addition, depending on the organization for which she is working, she might also during the course of her duties come into contact with existing and potential customers and/or clients, suppliers, those who provide services to the organization, such as lawyers, accountants and auditors, and others with whom the organization deals. The ability to get on well with a wide variety of people, and to be able to mix easily with them, is especially important in large organizations, and when many visitors are received.

Personality is not something which is easy to define, because it is made up of very many different and individual characteristics, personal traits and mannerisms. Different PA/secretarial posts might call for people with different personalities. Some are most suitable for those with bright, cheerful, outgoing personalities; whilst others call for people with more relaxed - "cool, calm and collected" - personalities, to give just two contrasting examples.

Common personality traits required, however, will include amiability, a sense of humour, the willingness to be helpful to others, patience, tact and politeness; which together ensure **a pleasant, even temper** and self-control (especially necessary during particularly busy or rush periods). The foregoing are important, as nobody likes to have to work with a bad tempered, excitable person!

### **Adaptability**

As we have already explained, during the course of her career a PA/secretary is likely to hold a number of different posts, which can require her to perform widely different tasks; and to work with different executives, each of whom will have a different character and different PA/secretarial requirements. Some of those changes in work to be performed and in bosses can occur at short notice. She therefore needs to be able to **adapt** quickly and smoothly to the changed circumstances so that her efficiency is unimpaired.

In cases in which a change of boss is involved, she might have to adapt her whole approach in order to "meld" effectively with the new executive, his character, temperament and PA/secretarial needs. She might even have to adapt or modify her personality as outwardly displayed to others to meet changed circumstances. For example, her promotion to a more senior post, say as PA/secretary to the managing director, might require her to demonstrate a more sober, dignified and responsible attitude than might perhaps have previously been necessary as PA/secretary to, say, the sales manager.

Adaptability or flexibility of mind also applies on a smaller, but no less important, scale to day to day work, as a PA/secretary must be prepared and able to leave off performing one task or type of work and switch quickly and smoothly to performing another. Quite often she might have to abruptly stop what she is doing and start on other work which her boss considers urgent (or work which circumstances dictate has become urgent) or which he wants done "at once".

She also needs the ability to decide - correctly - on the order of **priority** in which more routine work will be performed, so that all is completed satisfactorily and on time.

### **Mental Agility**

A good PA/secretary needs to be mentally **alert** and **attentive** and needs to be able to think clearly, to be receptive to new ideas and to grasp quickly - and react quickly to - new instructions and changed circumstances (that is, adaptability). She needs to be able to **reason** and to **analyse**, to possess **imagination**, and to display **initiative**; it is important that she does not have to be told how to perform every little task, even if it is slightly out of the ordinary.

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Quite often - due either to the absence of her boss or because he is otherwise occupied - a PA/private secretary will have to use her **initiative** and make decisions on her own. Such decisions as those should be based on her knowledge of the work performed by her boss, and on her experience of what he would be likely to do or want done in similar circumstances. At the earliest opportunity she should inform the executive of the decision she made or the action she initiated, and her reasons for so doing:-

\* to keep him fully “in the picture” and aware of the situation;

and

\* to give him the opportunity to make any modifications necessary.

In order for her to be able to use her initiative to make decisions and to initiate action, a PA/secretary needs **confidence**: in herself, in her knowledge and in her abilities - such self-confidence comes with experience and maturity. It is important, however, that such confidence does not lead to conceit or to arrogance which can easily offend others, or to “overconfidence” which can all too easily result in mistakes and accidents. The more senior the PA/secretarial position held - or sought - the more mature are the mental ability and sense of responsibility which need to be displayed.

### **Physical Attributes**

An executive **needs** a PA/private secretary who will be able to work well consistently; one who will **not** be “away” often because of ill health or whose performance will frequently be adversely affected by illness (or by some other “personal problems”). It might seem unfair to penalise a person for ill health, over which she might have no control, but on the other hand an executive will be penalised - and his work will suffer - if he does not have the **continuous** support and backing of his PA/secretary. (At the same time, a PA/secretary needs the ability to “hold the fort” during periods in which her boss is away ill or for other reasons.)

A PA/private secretary needs to be able to **see well**, in order to read figures, documents, machine dials, computer VDUs, and so on, depending upon the work to be performed. If necessary, glasses (spectacles) or contact lenses should be worn.

**Good hearing** is also an important physical attribute for a PA/secretary, especially for telephone work and for taking dictation.

In many cases, particularly during busy or “rush” periods, **stamina** is required to enable a PA/secretary to work long and hard without undue stress or strain. Physical fitness contributes to mental fitness or alertness which, as we have already seen, is so important for a PA/private secretary.

### **Language(s)**

A PA/private secretary needs **good diction**, that is, to be able to speak clearly, in a pleasant, well modulated and efficient-sounding voice. She needs a **wide vocabulary**, by which we mean she must have a knowledge of and the ability to spell and use correctly a wide variety of words. She needs the ability to **express herself clearly** and **fluently** without resort to “slang” terms and expressions, or to frequent “ums” and “ahs”. **Good and clear speech** is particularly important when using the telephone and/or intercom, and when receiving and dealing with visitors, so that callers gain a good impression of the speaker and of the employing enterprise.

Some PAs/secretaries need to dictate letters, reports, etc, and/or to give instructions to more subordinate office staff, which again requires them to speak well and clearly. In addition to their

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“mother” or “main” languages, some PAs/secretaries might also need to be able to speak and write well in another language - to be “*bilingual*”, or even more than one other language - to be “*multilingual*”.

In addition to speaking well, a PA/private secretary also needs to be able to **write well** and **grammatically** the language(s) concerned. Her **punctuation** must be good, as frequently those dictating do not indicate where commas and other punctuation marks are to be placed; and so she must herself decide, correctly, where to place them. Her **spelling**, too, must be excellent because:-

\* some dictators use words which they might themselves be uncertain how to spell;

and

\* because, as mentioned earlier, many executives are weak in spelling and rely on their PAs/secretaries to correct their spelling errors.

A well written and typed, attractively laid out and neat business letter gives a good impression of its writer and the enterprise on whose behalf it was written. (Business letters and documents are considered in detail in Modules 4 and 5.)

Another reason for needing a good command of the language(s) used is that a PA/private secretary might often have to check, and if necessary correct and improve, the work of clerks and typists subordinate to her. She might even have to teach them to be able to write and/or type letters and other documents to an acceptable standard.

## **Accuracy**

Most, if not all, of the many different tasks performed by PAs and private secretaries require attention to “detail” and accuracy. Carelessness, lack of attention or concentration, inaccuracies, etc, by a PA/secretary can easily lead to mistakes, delays, misunderstandings, complaints and even to losses of sales/production, money, customers and profits. They can cause problems for her boss, for the organization by which he and she are employed, and of course for herself; she could very quickly lose the confidence of her colleagues, her boss and her employers - and even her job.

Even seemingly “minor” errors, such as the misfiling of a document, can cause problems, and can waste much time and effort in locating and putting right - correcting - the mistakes. The need for accuracy and care extends to the making of calculations, to the completion of forms and to other business documents, to the making of entries in Books of Account and other records (manual and/or computerised), to the provision of information, to filing and indexing, and to many other tasks such as making appointments, travel arrangements, etc.

A duty of some PAs/secretaries might be to pay in or deposit monies into their organizations’ bank accounts, and/or to write out (“to draw”) cheques for monies to be paid out of those bank accounts, and to control and record petty cash expenditure. All of those tasks (which are dealt with in Module 10) require strict **accuracy** and **attention to detail**.

Clear, neat **handwriting** is an important feature in accuracy, as an unclear or badly written figure or word can lead to miscalculation, misunderstanding or misinterpretation, all of which can cause possibly serious problems; at the very least, time and work will be wasted in tracing and correcting errors.

A PA/secretary needs an **orderly** mental attitude towards her work - from which care and accuracy will result. Outward evidence of such a state of mind will be a neat and tidy desk and

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general work area - which might be a “private office” - cupboards, shelves, etc, and similar attention to those of the executive(s) concerned.

The ability to **concentrate** without being easily distracted is also important.

As we mentioned at the end of the previous Section, quite often a PA/private secretary also has to check the work of clerks, typists and others junior to her, to ensure the accuracy of **their** output.

### **Sense of Responsibility**

An executive needs to be able to **rely** on his PA/private secretary; to **depend** upon her to provide the support and backup he needs in the efficient performance of his work. He must be able to **trust** her to work well and thoroughly, without constant supervision, throughout the day - to arrive at work on time and not to leave early, day after day - and to complete her “share” of the work.

He must also be able to rely upon her to “deputise” for him when the necessity arises, and to rely on her to use her initiative in dealing with matters that arise which, for one reason or another, he cannot immediately deal with himself.

In other words, any executive wants - and needs - a PA/private secretary who is **reliable, dependable** and **trustworthy**.

She must also be **honest**. That extends not only to the safekeeping of all items of value entrusted to her, such as monies for banking, petty cash, postage stamps, blank cheques, stationery items, etc, but also to maintaining **confidentiality**. Quite often during the course of her duties a PA/private secretary might be entrusted with “confidential information”, that is, facts, figures and documents not intended to be generally known; it is essential that she keeps confidential all such information which comes into her possession.

She must resist any attempts by others - seniors, associates, subordinates - to obtain from her confidential information which she has not been authorised to communicate to them.

The various attributes which we have mentioned in this Section: reliability, dependability, trustworthiness, honesty and integrity all combine to form what is called a ‘**sense of responsibility**’. The possession of such a sense of responsibility is essential for progress and promotion in PA work/secretaryship, and for advancement to managerial and administrative posts. It encompasses many facets; in addition to those already mentioned:-

- ★ care to prevent damage to or losses of any *assets* (possessions) of the employing organization;
- ★ action to secure and to retain clients/customers;

and

- ★ care for others in preventing accidents and injury to colleagues and visitors alike.

### **Acquiring or Developing the Needed Attributes**

The foregoing, then, are the personal attributes which can be seen to be possessed by successful PAs/private secretaries. Of course, not everybody can be expected to possess them all, but many of them **can**, if not already possessed, be acquired and/or developed. Every person aspiring to be a successful PA/private secretary should first take a good, long, hard - *and honest* - look at herself,

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and decide which of the attributes we have described she currently lacks.

Having decided that, the second step should be to make a **determined attempt** *to remedy the situation*. That might not really be quite so difficult as it might seem, for example:-

- ★ If her “dress sense” is not good, she should seek advice from someone with an “eye” to what suits her best.
- ★ Similarly, if necessary, she can obtain professional advice on what hair style, make-up, etc, suits her best.
- ★ If she is shy, she must make a conscious effort to meet, and to mix with, other people.
- ★ If she is emotional or quick tempered, she must make a sustained effort to keep calm and collected - and to keep a hold over her temper whatever the provocation.
- ★ If her spelling is weak, she should obtain a good dictionary and refer to it whenever necessary.
- ★ If her arithmetic is weak, she should make use of a pocket calculator, and train herself to “cross check” all calculations she makes.

Many similar examples can be given, and it is important that action **is taken** to remedy any recognised “shortcomings”. The greater the efforts made, the greater will be the chances of a person making a success in her chosen profession - and it should never be forgotten that PA work/private secretaryship **is** a profession.

### ***Additional Skills Often Needed by PAs/Secretaries***

To a great extent the additional skills which might be needed by a PA/private secretary in order to perform her designated duties efficiently, will depend upon the particular post she holds at a specific time. In some situations a PA or secretary might not be called upon to use some - or even any - of the special skills she possesses. On the other hand, if she does not possess required skills, certain posts might not be open to her.

The following are skills which modern PA/private secretaries are commonly expected to possess.

#### ***Typing***

Some, perhaps more senior, PAs/private secretaries might themselves have typists subordinate to them to undertake most typing work. Nevertheless, the ability to type quickly, accurately and neatly is generally considered to be an essential accomplishment of a PA/private secretary. Frequently confidential letters and other documents - which an executive might feel uneasy about entrusting to anyone other than his PA/private secretary - need to be typed.

#### ***Word Processing***

Many modern PAs/secretaries are likely to find that they are called upon to use their typing skills on word processors (or on computers with word processing facilities) in addition to or instead of using conventional typewriters - whether old manual or electric ones or more modern electronic ones. The basic typing skills required are the same, and in general word processor and computer keyboards have the same basic layout as typewriter keyboards, although the former are likely to contain a variety of additional keys. Word processing can have many advantages over ordinary typing, and we examine them in Module 6.

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## Computer Operation

More and more organizations - small ones as well as very large ones - make use of computers, and the trend is bound to continue. It is important for modern PAs/secretaries to be familiar with basic computer operations, and to understand what a computer can do - and equally what it cannot do. This is not to say that a PA/secretary should be a computer programmer or a computer engineer; but rather that today she must **not** be "computer shy" or nervous about computers, but should accept and be able to use computers like any other piece of office equipment; the contemporary (modern) description is that she need to be '**computer literate**'.

More information about computers is given in Module 3.

## Shorthand

The ability to write one of the recognised forms of shorthand might not be as essential in a PA/private secretary today as it once was. This is because many executives make use of dictating machines - which are commonly called "*dictaphones*" - and indeed those who travel a good deal and/or who need to dictate outside normal working hours have little alternative but to use them.

There are still, however, many executives who prefer to dictate "direct" to their PAs/secretaries. And there is no dictating machine yet invented which can make selective notes of meetings, interviews or telephone conversations, or which can construct "full" letters or other documents from notes given, perhaps orally, by an executive! The ability to take down notes in shorthand - or in some form of abbreviated writing - is therefore still a valuable skill for many PAs/secretaries, and so we consider this matter in greater detail in Module 5.

We have now considered what is meant when we refer to a PA/secretary, and the personal attributes and skills which she (or he) might need to possess and/or to develop if she is to make a **success** of her chosen profession. We can now move on to consider the environment in which a PA/private secretary might work, and the types of work which she might be called on to perform during the course of her career.

## SELF-ASSESSMENT TEST ONE

Recommended Answers to these Questions - against which you may compare your answers - will be found on page 21. The maximum mark which may be awarded for each Question appears in brackets at the end of the Question. Do **NOT** send your answers to these Questions to the College for examination.

**No.1.** What do you consider is the basic function of a PA/private secretary?  
(maximum 25 marks)

**No.2.** (a) Why should a PA/private secretary always pay particular attention to her appearance?  
(maximum 20 marks)

(b) For what reasons must a private secretary always display a pleasing personality?  
(maximum 20 marks)

**No.3.** Why must a PA/private secretary be able to use her initiative?  
(maximum 25 marks)

**No.4.** Unless otherwise stated, place a "tick" in the box  against the **one correct** statement in each set of four.

- (a) *When we say that a PA/private secretary should "complement" her boss, we mean that:*
- 1  she should always tell him how clever, good looking or smartly dressed he is.
  - 2  she must complete any work which he has left unfinished.
  - 3  she should attempt to overcome any shortcoming or weaknesses he has which might prevent the successful performance of his duties.
  - 4  she should deal quickly and efficiently with any complaints made about him or the performance of his duties.

- (b) *The PA/private secretary and her boss should attempt to develop a working partnership under which:*
- 1  she takes over as many of his tasks as she can so he has as little as possible to do.
  - 2  the work to be performed is divided as evenly as practicable between them, with each performing the tasks for which he/she is most suited, and with each assisting and complementing the other.
  - 3  each does what he or she feels like doing each day, depending on the workload.
  - 4  he tells her the specific tasks she is to perform each day, and then supervises and checks every detail of her performance of those tasks.

- (c) *A PA/private secretary needs to be adaptable because:*
- 1  her circumstances, the tasks she must perform and even her boss can change, sometimes at short notice.
  - 2  she changes employers on a regular basis, being unable to settle successfully with any one of them.
  - 3  any time she is assigned to, or employed by, a new boss, she must ensure that he quickly understands her methods and techniques.
  - 4  all bosses have rapid mood changes, and she must get on with each one amiably no matter how they behave towards her.

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- (d) Tick  the **one** INCORRECT statement amongst those following.  
*A PA/private secretary:*
- 1  should be reliable, dependable and trustworthy.
  - 2  needs to be honest and to have a sense of responsibility.
  - 3  needs to be a computer expert, and preferably a programmer.
  - 4  should keep information regarding her work, howsoever obtained, strictly confidential.
- (e) Tick  the **one** INCORRECT statement amongst those following.  
*It is likely that the modern PA/private secretary will need:*
- 1  the ability to type accurately.
  - 2  word processing skills.
  - 3  familiarity with computers, and the ability to operate - or learn to operate - the system used by the enterprise employing her.
  - 4  a university degree or a qualification in office routine/administration.

(2 marks for a statement correctly ticked - maximum 10 marks)

## **RECOMMENDED ANSWERS TO SELF-ASSESSMENT TEST ONE**

**No.1.** The basic function of any PA/private secretary is to assist and to complement the executive (or executives) to whom she is assigned in the efficient performance of his duties. That assistance can take many forms, depending on the work involved, but in general she will in particular be expected to relieve the executive of many routine and perhaps mundane tasks so that he has more time available to devote to more important and pressing tasks involved in his particular job. At the same time, she must - as far as it is possible for her to do - complement the executive, that is, attempt to remedy or overcome any shortcomings or failings he might have which could interfere with the efficient performance of his duties.

**No.2.** (a) Firstly, it would not be very pleasant for an executive, or for others, to have to work closely with a person (whether a PA/private secretary or not) who is dirty or untidily or otherwise badly dressed. Secondly, quite often the initial or first contact which a visitor has with an enterprise is with the PA/private secretary to one of its executives. If the "first impression" she makes on the visitor is a favourable one, that will reflect well on her boss, and on the enterprise as a whole. An important factor in making that good first impression is her appearance, and it is therefore important that she is always neatly, tidily and tastefully attired, which will contribute to conveying an air of efficiency and competence.

(b) For many reasons, in the course of her daily duties a PA/private secretary is likely to have regular contact with a variety of personnel of different status working in the same enterprise, as well as with visitors to it. She needs to be able to mix well, and to get on well, with all those with whom she comes into contact, not only for harmonious relations but also to ensure that she and her boss receive full co-operation from others, will secure and retain customers/clients, and so on. She can only get on well with other people if she displays a pleasing personality, which will include being friendly, amiable, helpful, co-operative, and even tempered, and by remaining cool and collected whatever the provocation.

**No.3.** No PA/private secretary can expect her boss to be on hand every moment of the working day to tell her what to do and when to do it; she must be able to perform her work well and consistently without constant supervision. Furthermore, in the absence of her boss, or when he is otherwise engaged, she will often be called upon to make decisions and to take actions - on behalf of her boss - which cannot wait until he is in the position to take them himself.

It is important that she is able to use her knowledge of his work, and her experience of his methods and preferences and requirements, to take the right decisions and/or actions in the circumstances without hesitation and without panicking.

**No.4.** The right statement from each of the sets selected and ticked:

- (a) 3  (b) 2  (c) 1  (d) 3  (e) 4

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## **WHAT YOU WILL LEARN IN MODULES 2 TO 12 OF THE CIC ADMINISTRATIVE/PERSONAL ASSISTANT & SECRETARIAL DUTIES PROGRAM**

### **Module 2 - PA/Secretarial Work-Environments**

Organizations which employ PAs/private secretaries:  
the modern world of commerce:  
the public sector and the private sector  
industrial enterprises  
trading enterprises  
service enterprises  
the professions  
non-profit making organisations  
Specialisation and the variety of activities  
The functions of the office:  
its concern with information  
Centralised and decentralised offices:  
clerical centres  
Office location and planning:  
multi-room layout  
open-plan layout  
Where a PA/private secretary might work:  
considerations in accepting posts  
The avoidance of overcrowding in offices  
Minimising staff movement:  
O & M studies  
Office lighting  
Ventilation, heating/cooling in offices  
Toilets and cloakrooms  
Supervision of different categories of office personnel  
The prevention of accidents in offices  
Providing the right office environment:  
walls and ceilings  
floor coverings  
lighting  
ventilation and heating/cooling  
Office furniture and furnishings:  
utility  
cost  
image  
status symbols  
standardisation  
Harmony amongst office personnel:  
causes of friction  
Office/secretarial desks and chairs:  
desirable features

### **Module 3 - Information, Records and Filing**

PA/secretarial duties concerned with information  
Sources of information:  
from within the organization  
external sources  
the Internet:  
websites  
What records are and why they are maintained  
Ways in which information might be recorded

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Collating, analysing and presenting information  
in the required formats

Filing:

- what is involved
- it aims

Filing systems:

- installing/evolving the most suitable system

Centralised filing:

- advantages and disadvantages

Filing schemes:

- alphabetic
- numeric
- geographic
- chronological
- subject matter
- combinations

Cross referencing

Indexing

Record retention:

- microfilming
- storing computer records

Filing equipment:

- vertical filing
- lateral filing

Loose card filing systems

Visible card filing systems

Types of records:

- accounts
- sales
- stock
- personnel

Maintaining records by computer:

- characteristics of computers
- computers as aids to management and administration

computer hardware:

- the central processor
- hard disk and hard disk drive
- keyboard
- visual display unit (VDU)
- the mouse
- scanners
- printers
- floppy discs and floppy disc drives

computer software - the programs:

- tailor-made
- applications packages
- database packages

database systems:

- the advantages:
  - shared data
  - record and report design

the importance of good data

data security:

- backups of data
- security codes and passwords

data storage and deletion

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#### **Module 4 - Oral Communication, Forms and Business Documents**

Definition of communication  
The importance of good communication in any enterprise  
Oral communication:  
    advantages and dangers  
    emphasis, inflexion and tone  
    adaptability  
Unspoken forms of communication  
When written communication is necessary  
Communication by telephone and intercom  
The principles of effective communication  
The many and varied uses of forms  
Factors to consider in designing a form:  
    the information really needed  
    sizes of spaces left for information  
    logical and coherent sequence  
    standardisation of layout  
    presentation  
    catering for filing  
Illustrations and descriptions of common forms  
    and business documents:  
        order form  
        invoice  
        credit note  
        statement of account  
        cheque or check and counterfoil  
        pay-in/deposit/lodgement slip and counterfoil  
        receipt for payment  
        petty cash voucher  
        delivery note  
        goods received not  
Accuracy in completing forms  
Series of forms  
Comparison of manual and computer "completion of forms"

#### **Module 5 - Business Letters**

Why business letters are written  
Ways in which business letters differ from personal letters:  
    the letterhead  
    the date  
    the addressee  
    the greeting  
    references  
    the closing expression  
    designation of writer  
A specimen business letter examined  
Layouts of business letters:  
    indentation  
    justification  
    block layout  
Action to enhance the appearance of business letters  
Planning business letters:  
    making notes of topics  
Drafting:  
    what is involved  
    advantages  
Stock sentences and paragraphs  
Notes or annotations:  
    constructing letters from them, example

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Systems of shorthand and shortened writing:

- Pitman's shorthand
- Gregg shorthand
- Speedwriting
- Palantyping

Taking dictation by shorthand:

- matters for stenographers to remember

Giving dictation to stenographers and palantypists:

- matters for dictators to remember
- matters for stenographers to remember

Dictation into a machine:

- dictaphones
- computers
- matters for dictators to remember
- audio typists

## **6. Memoranda, Reports, Telecommunications, Word Processing**

Internal communication:

- vertical and horizontal

When memoranda should be used

How memoranda differ from business letters

Routine reports:

- gathering and compiling data

Special reports:

- aims
- essentials
- selecting the best styles and forms of presentation

Word processing:

- dedicated machines and computer WP packages
- advantages of word processing
- standard features of WP software packages
- WP spell check
- the WP Thesaurus
- learning to use word processing
- problems caused by different "packages" and updates

Desktop publishing:

- facilities offered

The electronic office

Telecommunications:

- telephones and intercoms
- fax (facsimile transmission):
  - advantages
  - fax machines
  - computer-controlled fax transmission and receipt

email:

- internal LANs and electronic mailboxes
  - advantages over paper-based memos
- external communication via Internet:
  - advantages over other methods
  - email addresses
  - causes of delays and non-receipt of messages
  - facilities offered by email packages

clarity of communications

- computer viruses:
  - antivirus software

## **Module 7 - Meetings**

The PA's/private secretary's possible involvement with informal meetings

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Written confirmation of informal discussions, decisions and agreements reached in letters, memos and forms  
How a formal meeting differs from an informal one  
Notices of meetings:  
    convening meetings  
    dates  
    times  
    venues  
Agendas of meetings:  
    why they are prepared and distributed  
Common topics listed on agendas:  
    apologies for absence  
    minutes of the previous meeting  
    matters arising  
    specific matters for discussion or decisions  
    any other business  
PA/secretarial work in preparing and distributing notices and agendas  
Minutes of meetings:  
    why they are prepared  
How minutes might be written:  
    notes during a meeting  
    subsequent action  
    rules to observe,  
    distribution of minutes  
Confidentiality  
Other possible PA/secretarial duties prior to meetings  
Possible PA/secretarial duties during meetings  
The PA's/secretary's correct demeanour during meetings  
Conferences and conventions

### **Module 8 - Incoming and Outgoing Mail**

How incoming mail may be received  
Centralised mail opening:  
    possible procedures  
    distribution of opened mail  
    supervision by an executive's PA/secretary  
Practical example of actions by a PA/private secretary  
    in dealing with:  
        incoming mail for her boss or his department:  
        personal and incorrectly delivered mail  
        removing contents of envelopes:  
            checking all information  
        marking date of receipt  
        sorting opened mail into categories:  
            processing different types  
        dealing with payments received  
Centralised despatch departments or post-rooms  
Postage rates  
Methods of postal transmission:  
    inland, overseas, surface, airmail  
Classifications of mail:  
    sealed letters, printed matter, parcels, etc.  
Special services:  
    recorded delivery  
    registration  
The responsibilities of those despatching by post  
Why the correct value of postage must be affixed to every item  
Postage stamps:  
    protection from loss and damage

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Franking machines and other mail-room equipment  
Preparing typed letters and documents for despatch:  
features to check:  
addressee's name and address  
date  
spelling and punctuation  
figures,  
layout, tying and appearance  
copies  
enclosures

Envelopes:  
correct sizes  
colours

Packing for despatch

### **Module 9 - Reception Work, Visitors and Appointments**

The reception as the enterprise's show case

Attributes of good receptionists:  
attractive appearance  
amiability  
patience and tact  
knowledge about the enterprise  
product knowledge

The main types of reception work:  
welcoming and directing visitors  
supplying information  
maintaining records  
making appointments  
accepting deliveries  
holding items for collection

Making appointments for people to see an executive in his office:  
actions depending on whether he wants to see them or  
they want to see him  
reasons  
other personnel or outsiders

Using initiative in making appointments:  
full example

Avoiding making appointments

Handling visitors:  
visitors who have to wait  
visitors without appointments

Making appointments for an executive to see people at their premises:  
actions depending on whether they want to see him or he wants to see them  
reasons  
other personnel or outsiders

Cancellation, postponement and rearrangement of appointments:  
why that can be unpleasant or disappointing for secretaries

The appointments book or diary:  
why it is used

what information might be recorded in it

Making travel arrangements for an executive:  
booking modes of transport  
reservations at convenient and/or suitable hotels  
preparing itineraries

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### **Module 10 - Money Matters**

Resources available to enterprises  
Manual and computerised bookkeeping/accounting  
Principles of double-entry bookkeeping:  
    why two entries are necessary for every transaction  
The ledger:  
    what it records  
    ledger accounts  
    the debit side of a ledger account:  
        what it records  
    the credit side of a ledger account:  
        what it records  
The cash book:  
    what it records  
    why it is used  
    its debit and credit sides  
    balancing  
The sales book:  
    what it records  
    why it is used  
The purchases book:  
    what it records  
    why it is used  
The returns inwards and outwards books:  
    what they record  
    why they are used  
The journal:  
    what it records  
    why it is used  
Banking:  
    frequency  
    pay-in or deposit slips  
Issuing cheques:  
    the parties to a cheque transaction  
    features of cheques to be checked for accuracy  
Cheque security:  
    precautions against fraud and forgery  
    open cheques and the effect of crossing  
    special crossings  
Cashing cheques:  
    why that might be necessary  
    how it is done  
Checking bills:  
    the aim  
    what matters should be checked and why  
    passing and paying bills  
Petty cash:  
    why and for what it is used  
The petty cash book with analysis columns  
The imprest system of petty cash:  
    its advantages  
Ordering stationery items:  
    by telephone  
    using an order form  
    by letter  
Ordering the printing of literature:  
    reprints  
    new jobs  
Checking incoming deliveries  
Storing stationery:  
    prevention of loss and damage

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### **Module 11 - Supervision of Office Personnel (1)**

What is involved in recruiting personnel  
Internal recruitment:  
    what might be involved  
    possible advantages  
    avoiding problems  
External recruitment:  
    possible sources of personnel  
Introductions by existing personnel  
Job analysis:  
    what is involved  
Job descriptions:  
    what they may contain  
Employee specifications  
Advertising to fill vacancies:  
    specimen advertisements  
Employment interviews:  
    their aims  
    planning and preparing for them  
    method of conduct for productive results  
Selection tests  
Selecting a suitable candidate:  
    the letter of appointment  
Trial or probationary period  
The importance and aims of good employee induction  
Stages in induction:  
    what might be involved  
Introduction to and integration into the work group  
On-the-job training:  
    why it is necessary  
    what it should involve  
    simplifying the tasks  
    avoiding problems  
  
Benefits of on-going training and job redesign:  
    job rotation  
    job enlargement  
    job enrichment

### **Module 12 - Supervision of Office Personnel (2)**

The functions of management:  
    planning  
    organising,  
    co-ordinating  
    motivating  
    controlling  
The PA/secretary as office supervisor:  
    carrying out the functions of management  
Relations with other office staff:  
    subordinate staff  
Setting good examples in attitudes, behaviour and work  
Maintaining discipline in the office  
Employee counselling:  
    what it entails  
    benefits which can accrue from it  
    work-related and personal problems  
Harmony in the office:  
    dealing with arguments and upsets

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Unavoidable and avoidable resignations

Threats of resignation:

responses

Employers' references or recommendations

Paying salaries and wages:

rates of pay

additions and deductions

pay-slips

### ***Preparing for Promotion to Supervisory/ and Managerial Posts***

The technical and managerial aspects of a management post

Steps in preparing for promotion:

studies/training

gaining practical experience

Qualities looked for in those seeking promotion:

willingness to learn and do more

relations with other people

ability to accept responsibility

ability to handle authority

trustworthiness

reliability