

OFFICE MANAGEMENT/ADMINISTRATION

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 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 Course or 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.

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

OFFICE MANAGEMENT/ ADMINISTRATION

Module One

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THE OFFICE AND MANAGEMENT

The Role of an 'Office'

To the layman, the word "office" might conjure up a picture of just one room; the office of a manager or another executive, for example.

However, in an enterprise '**The Office**' is

"A section or department of that enterprise which is delegated the responsibility for performing certain important functions, and for providing certain essential services for the enterprise as a whole."

During this Program, when we use the word **Office with a capital O**, we are referring to the section or department.

The Office of a small enterprise might, indeed, occupy just one room. The Offices of larger enterprises, however, might occupy a number of rooms, perhaps located on two or more storeys of a building or with "divisions" of the Office located at various strategic positions in a large complex. An enterprise which comprises a number of large departments might need to have an Office situated in each such department; for example, there could be a "Sales Office", a "Stores Office", an "Accounts Office", and so on as appropriate. In addition, there might well be a "Central Office" to co-ordinate and control all the Office functions and services from wherever, for convenience, they might need to be performed.

The activities of some enterprises require them to employ large numbers of clerical, secretarial and other Office personnel; examples include banks, finance houses, insurance companies and building societies. In contrast, other enterprises of comparable size might need only small Office staffs (although their total work forces might be very large); common examples include manufacturing businesses, mines and building contractors.

Clearly the size of a particular enterprise and the nature of the activities in which it is engaged dictate the size of the Office and the Office staff which **it needs** in order to function smoothly and efficiently.

Clearly, too, the **status** of the person placed in charge of the functions performed by the Office and the services provided by it will depend upon the size of an enterprise and of its Office. In some cases he or she will be a senior clerk or an Office Supervisor working closely with the owner or manager of the enterprise. In other cases an Office Manager - increasingly being called the '**Administrative Manager**' - will be appointed, and he or she might even need to be a member of the Board of Directors (of a company).

Information

Whatever its size, the Office of any enterprise is basically concerned with **information**, which is today often referred to as '**data**'. The activities of an Office can broadly be divided into:-

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- * Gathering, receiving and recording information.
- * Collating the information collected, analysing it and then presenting it in the formats in which it is most useful to those who require it.
- * Storing the information, for example filing it or recording it in a computer, so that it is readily available when it is required.
- * Communicating the information, in the formats in which it is required, to those who need it.

We consider each of the above functions in detail in later Modules.

Information will be **received** by the Office both from within the enterprise and from “external” sources, and will similarly have to be **‘communicated’** to destinations both within the enterprise and outside it. The importance of good internal and external communications - very often the responsibility of the office manager or administrator - is also considered at length, in Module 3.

The functions performed by an Office and the services it provides have an important bearing on the smooth running and efficiency of the entire enterprise of which it forms part. It is therefore essential that the Office is itself **efficient** and **well managed**.

The Meaning of Management

It follows from the foregoing that it is necessary for all who aspire to positions as supervisors, managers or administrators in charge of Office activities to have a sound knowledge of what is involved in **modern management**, and for them to be **proficient managers**.

It is very common for those who reach positions as Office supervisors, managers and administrators to have started their careers in clerical and/or PA/secretarial positions, and to have secured promotion as the result of the knowledge and practical experience they have gained. That is very good grounding, because in general a manager or supervisor needs a good knowledge of the work to be performed (in this case *office practice* and *office routine*) in the section or department under his or her control.

However, it does **not** necessarily follow that even the most efficient and experienced clerk or secretary will automatically make an effective supervisor or manager. The reason is because his or her task as a supervisor or manager will involve FAR MORE than the performance of clerical or secretarial work alone.

Managing the work of other people is a very different task from actually performing the work oneself. That is because management involves planning, organising and co-ordinating the work of those others, training them, motivating them to work well and willingly, as well as supervising and controlling their efforts. To put it simply, it can be said that management is involved with:

“Ensuring that a group of people work together in the most effective and efficient manner to achieve a stated goal in the most economical way.”

Management is a job, but a job which is that much more difficult because it involves dealing not with just inanimate objects, services or theories, but with unpredictable men and women, each of whom has a different and complex character. Management involves providing **leadership** for the group of people and much more; they require training, advice and guidance, supervision and control, and if the stated goal or objective is to be achieved, their work must be so planned, organised and co-ordinated that they work together as a **‘team’**.

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Having used the words “goal” and “team”, it is possible to examine further the objectives of management using an example with which most people are likely to be familiar - a football (soccer) team.

Such a team comprises eleven people. Each of them is an “individual”, but they do NOT simply walk on to the football pitch, stand wherever they feel like and start kicking the ball in any directions at random. If they did so, they would stand little chance of beating the opposing side! **No!** - under the direction of the *team captain* - who is one of the eleven players - and the *team manager*, who might not necessarily be one of the players, and who might remain off the pitch, we find that:-

- * Each team member takes up a *predetermined position*; where possible the position which, from previous observation, he has been found to be most suitable.
- * From prior training, each player should *know his role* in the team (as an attacker or as a defender, for example), and *know the rules* of the game.
- * Whenever possible, the members of the team will try to play the game to a *plan or method laid down in advance* by the team manager.
- * Their efforts on the field will be *controlled and co-ordinated* by the captain, who will give *additional instructions* and take *on-the-spot decisions* as necessary.
- * Because the eleven players are a team - and not just eleven individuals playing separately with the same ball - they will *pass the ball* to team-mates, will try to *create opportunities* for them, and they will play **TOGETHER** in co-operation to *achieve their objective* - which in their case is to score goals against the opposing team.
- * By giving *guidance and encouragement*, the captain and team manager will *motivate* the team members to do their best to win.

Management In Business

The foregoing example can be related to a business, especially as many professional football teams are run along business lines. The team manager would be the owner of the business or a departmental or section manager of it, who might not actually perform the work concerned, but who must possess considerable knowledge of that work. The equivalent of the captain will be a supervisor or a foreman or an assistant manager, who although subordinate (junior) to the manager, will work closely with him. The other players would be the members of the staff of the enterprise or the relevant section or department of it.

The **objective** of the particular enterprise, section or department might be the production of an item or the sale of an item or the provision of a service. The manager and the supervisor must ensure that the members of the staff are so organised and controlled that they **work together** to achieve the stated objective; therefore:-

- * Each individual must know what he/she has to do, when and how to do it.
- * Whenever possible or feasible, each person should be given the work to do which he or she is most suited to perform, and training should be given on the performance of that work.
- * The work of all the members of staff should be planned in advance and so organised that one person is not idle whilst another is overloaded.

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- * The efforts of all staff should be co-ordinated so that there will be no hold-ups or delays and so that, if necessary, work will flow smoothly from one person to the next.
- * The manager and supervisor must be available and willing to advise, guide, assist and encourage the employees.

You will no doubt have noted the statement that the manager **might** not actually perform the work on which his or her subordinates are engaged; exactly as the football team manager might not go on to the pitch and kick the ball during a match. The modern worlds of commerce, industry and administration are complex, and it is that very complexity which has led to what is called '**specialisation**' and the '**division of labour**', by which different people specialise in - and become specialists in - different types of work.

Thus the **functional** or **technical** work of different managers might vary enormously: there are office managers, sales managers, stores managers, production managers, construction managers, and many, many more; and the functional or technical work of a factory manager in one enterprise might differ greatly from that of a factory manager in another. All those managers should have considerable knowledge of the technical aspects of their jobs **in addition** to being **proficient managers of people** (it is not, in any case, easy to train, supervise and control the work of others without knowing what they are - or should be - doing).

So the duties of **any** manager or supervisor comprise two different aspects:

- * **The 'technical' or 'functional' aspect**, which is concerned with **the work to be performed** by his enterprise, department or section; and
- * **The 'human' or 'managerial' aspect**, which is concerned with **the people who perform that work** in his enterprise, department or section.

A factory manager, for example, might spend all of his working hours on management and might take no part in the physical production of the item(s) manufactured in the factory; he might not, for instance, actually operate a machine - but he **must** know how those machines operate, how to train operators for them, what maintenance they require, their performance features and limitations, and much more (and the same applies to an office manager in relation to Office machinery and equipment).

Similarly, a sales manager **must** know everything about the products to be sold, and he might spend most of his time training and controlling his sales force, organising market research, arranging advertising and publicity, etc. He might leave most of the actual selling work to his salesmen and/or saleswomen; but he will probably be called upon to help them with important or difficult customers or with complicated sales, and so at times will be actively engaged in meeting customers and thus in the actual work of selling.

Some estimates indicate that a managing director might spend 80% to 90% of his or her working time on management; that senior managers spend approximately 50% of their working time on management; whilst junior managers and supervisors might spend from 25% to 30% of their working time at work on supervision.

Although a particular manager's "team" of staff might not actually confront an opposing - competitive - team on a playing field as in the football example, it is often vital that his staff "beat" a similar group employed by a competitive enterprise; not by scoring goals against them, but by producing a better product or providing a more efficient service, or by producing the product or providing the service more economically. Most businesses have competitors producing similar products or providing similar services; in most cases a business can survive **only** by keeping abreast of the competition, and can

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only expand (for the benefit of its owners, managers and other employees alike) by doing **better** than its competitors.

As it is only the skilled manager who can “weld” his or her staff into an efficient and co-ordinated team capable of achieving its objective in the best and most economical way, you can see just how important are proficient managers and effective management to any enterprise.

Before considering in more detail what is involved in management - its functions - one important matter must be stressed. Not only must the Office be well managed, but ***it must be seen to be so*** - by:

✳ its provision of *efficient services to*;

and by

✳ its provision of *all needed assistance to*

all other sections and departments of the enterprise.

This is essential, because in some enterprises the great importance of the Office is sadly underestimated. The Office is not involved in the “primary” functions of the enterprise - as are the production department and the sales department, for example - and so there is a tendency to look upon it as being “*nonproductive*” and, in consequence, of little “value”.

That is quite an **unrealistic view**, as you will appreciate more and more as you proceed with your studies in this Program. But it is a view which is expressed in some enterprises. In such cases an office manager and his or her staff must work especially hard to convince other managers - and top management in particular - of the **true worth** of his or her department to the enterprise as a whole, and also to justify the expenditure necessary to ensure its efficient operations.

The Functions of Management

The “human” aspects of any manager’s job can be divided broadly into five functions or activities, which are:-

- Planning.** This involves deciding how the predetermined objectives of the enterprise or department of it, should be achieved in the most efficient and economical way in accordance with policy.
- Organising.** This involves putting the “theory” (the plans) into practice - so arranging the work to be performed that the objectives will be achieved as laid down in the plans.
- Co-ordinating.** This is very closely related to organising, and ensures that although different staff might perform different work, all their efforts “mesh” smoothly together and are directed towards achieving the common objectives.
- Motivating.** This involves providing “leadership” for subordinates, and it also requires the ability to inspire them to give of their best in achieving the set objectives, by creating a good morale or working spirit amongst all those employed by the enterprise.
- Controlling.** This comprises supervising the people employed, checking their work and the equipment used, to ensure that the end products are the desired objectives; it also includes the recording of performances to provide a guide for similar activities in the future.

Objectives of Enterprises

You will have noticed that the five functions of management are all concerned with achieving OBJECTIVES, and it is therefore necessary to first consider what they might be and who decides what they are to be. Basically, objectives are the goals which an enterprise aims to achieve; in fact their *attainment is the principal reason* for the existence of that enterprise.

Before any enterprise is started or established, a person or a group of people has to **decide what that enterprise is going to do**. Is it going to manufacture something - if so what? It is going to buy and sell - if so what? It is going to provide a service - if so what? The same applies to a new section of an enterprise, for example the establishment of a computer section in an Office.

In some cases the answer or decision is fairly straightforward, for example a person might decide to open a bookshop, or an experienced painter/ decorator might decide to set up on his own instead of working for others, or management might decide to establish a centralised filing section. However, in other cases considerable thought and research might be necessary before it is decided whether or not to produce or to provide something which is not already available, or which is likely to be able to compete successfully with similar products or services already available.

You should note that the specific objectives of what are commonly called “businesses” are combined with the objective of PROFIT; that is, the result of achieving the specific objectives of a business must be that its owner(s) gain money.

Policies of Enterprises

Hand in hand with the decision on the objectives of an enterprise is the necessity to decide in broad terms **how** and **where** the objectives are to be achieved, that is, to lay down the basic POLICIES of the enterprise. If the objective of a particular enterprise is to sell, then it must be decided how sales will be made (for example, for cash and/or on credit) and where sales will be made; from shop(s) or by mail-order or through travelling or door-to-door salesmen, etc, and, of course, where the premises of the enterprise will be located.

The Interpretation and Implementation of Policies

Once the initial objectives and the basic policies of an enterprise have been decided upon, the actual achievement of those objectives is the responsibility of the members of the management team (which in a small concern might comprise just one person, i.e. its owner or “manager”). In other words, they have to set in motion the various activities which will **actually gain those objectives** IN PRACTICE.

That involves two important factors:-

- ★ Firstly the policies must be **interpreted**. This means that the policies must be examined carefully, and “broken down” to see clearly what activities and tasks will have to be undertaken.
- ★ Secondly, once it is clearly understood what will be involved, it can be decided what steps must be taken to **implement** the policies - what actions are necessary to put them into practice.

In other words, the policies - the theory - have to be **‘translated’ into action**.

Unless an enterprise is very small, in addition to there being objectives for the enterprise as a whole, there will also be *departmental objectives* set by the board, with policies laid down for the attainment of them.

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The objectives of a particular department will, naturally, be narrower in scope than those of the enterprise as a whole. For example, the basic objective of the Office (department or section) will be to provide certain needed services to some or all other departments and/or sections of the enterprise - and to do so as efficiently as possible. The policies for the Office (regardless of its size or the number of staff employed in it - possibly just a few clerks and/or secretaries in many instances) will cover such matters as what services are to be provided, how they are to be provided and from where, etc.

Unless **each** department - the Office included - attains its set objectives, the overall objectives of the entire enterprise might not be achieved.

An office manager/administrator (who as a “specialist” might be able to advise or influence the board on setting his or her department's objectives and in its policy making) will have to:-

* **interpret** the policies laid down for the Office - as a department;

and

* **implement** those policies to achieve the objectives set for the Office.

In doing so, he or she will have to set objectives and lay down policies for their achievement for each of the sections of the Office which make up the department. The objectives of each section will inevitably be narrower in scope than those of the department as a whole; but each must attain its set objectives.

Each section manager - under the guidance of the office manager - will then have to interpret the policies for his or her section and implement them. That will require him/her, in turn, to set the even narrower objectives - and to lay down policies for their achievement - for each team in the section, which will be under the control of a supervisor or a senior clerk.

Finally, each supervisor or senior clerk will have to interpret the policies and implement them. He or she will do that by explaining clearly to each member of the team - in clear and familiar terms - what he or she is to do, when and how.

So you can see that, stage by stage, the broad, overall objectives and the policies set by the board, are “broken down” into the possibly very narrow range of tasks and activities to be performed by each individual employee.

The five functions of management are all concerned with the interpretation of policies and their implementation in order to achieve the set objectives. We must now turn our attention to a more in-depth study of them

Planning

Plans are *routes to objectives*. Once objectives have been set, planning is necessary to work out **how to achieve** those objectives **in practice** within the framework of the policy formulated.

* The board of directors, top management, is involved mainly with long-term planning or ‘**strategic planning**’, which is concerned primarily with deciding what the objectives of an enterprise should be in two, four, five or even ten years ahead, and its future policies. Such planning is concerned mainly with the enterprise as a whole rather than with individual departments or sections.

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- * Senior management is involved in '**tactical planning**', that is, planning how the overall strategies are to be achieved; devising and operating short-term plans, for up to a year ahead.
- * Other levels of management are involved mainly in very short-term '**activity**' or '**operational planning**' involving the day to day running of departments or sections and individual assignments; for example, planning the work of the office staff, or deciding what each member of that staff should be doing at any given time.

A good deal of the planning which an office manager will be called upon to perform will involve making routine decisions and dealing with everyday matters; for example, planning the work of a team of Office staff, which might be similar week after week. However, plans must always be **flexible** so that they can quickly and easily be modified in the light of events. For example, an office manager might have decided how his staff will cope whilst one member of the team is on holiday, and has planned the rearrangement of the work. But the day after the implementation of the new plan, another member of staff falls ill; so he must quickly modify his plans, and determine how the work can be rescheduled with two staff away.

Much of such routine planning will be an automatic process, requiring little conscious thought on the part of the manager, as his plans and decisions will be based largely on past experience with similar, or even identical, problems. Other planning might require far more conscious thought, investigation and research before decisions are reached; diverse examples include planning the training of new Office staff, planning the implementation of a computer system, planning the production of a report.

Organising

Once the plans - i.e. the theory - have been formulated, the manager is involved in organising the physical resources at his or her disposal - the men and women, materials, machines and equipment, and even the premises - to ensure that the objectives are achieved as planned.

Organising involves **much more** than simply instructing a given number of people to start work, for example:-

- * Each person must know exactly what he or she has to do (and if necessary must be taught or trained to perform that work), how the work is to be done, when it is to be done, and so on.
- * The various materials needed must be readily available; as must services necessary, electricity for example.
- * The best machines and equipment, within the financial resources of the enterprise or department, should be available for use, regularly maintained and in good working order and - if necessary - training must be given to those who will operate it.
- * The allotted premises must be so laid out as to provide for the maximum efficiency and convenience.
- * The available amount of space must be utilised in the most effective layout, to avoid wasted effort, duplication and unnecessary movement.
- * There must be an adequate and competent, trained staff to perform the work concerned.

To summarise, we can say that organising involves:

“Ensuring that the right staff, the right materials and the right equipment are in the right places at the right times and in the right quantities, so that work will proceed in accordance with the formulated plans, without delays, hold-ups or stoppages.”

Co-ordinating

Organising and co-ordinating are very closely linked, and frequently co-ordinating is an essential continuation of organising. Co-ordinating involves ensuring that all efforts *move smoothly together in the same direction*, that is, towards the attainment of the common objectives.

Co-ordination is as essential by top level management as it is at junior management and supervisory levels. For example, the managing director or general manager must ensure that the efforts and activities of all the different departments of an enterprise are in harmony, and work in co-operation; there is no point in, for example, the sales department endeavouring to sell items not yet in stock or in production! Good relations and good communications between departmental managers must be developed and fostered so that they work together in concert.

At the other end of the scale, the more junior manager or supervisor must co-ordinate the work of his or her subordinates so that although different people might be performing different tasks, work will, when necessary, flow smoothly and continuously from one person to the next. For example, in an Office one clerk might draft a letter which - perhaps after being checked by another person - has to be passed to another clerk for typing or word processing; after typing the letter has to be passed to another person (perhaps the manager) for checking and signing, after which it will be passed to a person who will affix postage stamps or to a despatch clerk for franking, and finally for posting. Furthermore, a copy of the letter and that to which it is a reply must be correctly filed - perhaps by a filing clerk - for future reference.

Four or five or more people might be involved in the foregoing simple and probably very common and routine Office operation; but their tasks must be so planned, organised and co-ordinated that the efforts of each mesh together like gearwheels. Delays and backlogs would ensue if, for instance, the clerk drafted fifty or sixty letters before they were checked and passed the person who performs the typing/word processing - who might in the meantime be sitting idle waiting for typing work, and so on “down the line”.

Organising and co-ordinating are also essential to ensure that work is evenly distributed so that one person is not idle whilst another has more to do than he or she can reasonably cope with. At the same time, wasted effort, duplication of work and unnecessary movement - of personnel and documents - should be reduced or eliminated as far as is possible (we refer to these matters is later made when discussing Organization & Method Studies).

Motivating

Motivation is directly concerned with the people who work for a particular enterprise. It involves encouraging them to work well and willingly in the most economic manner in the best interests of the enterprise; and in their own best interests, too. No matter how automated or computerised an enterprise or a section or department of it might be, its objectives will still have to be achieved through the efforts of PEOPLE. And people need to be **motivated** - induced, persuaded, prevailed upon (but **not** forced) - in a humane, understanding way to give of their best.

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However, what motivates one person or group of people might not necessarily motivate another, and therefore for the best results a manager should, as far as it feasible, get to know something about each of his subordinates, because:-

- ❖ Mere financial reward is more of an incentive than a motivation to many people, although the end result - greater effort or better performance - might appear the same.
- ❖ Many people today are interested in gaining more from their employment than just money; they tend to look for what can be termed “*job satisfaction*”, doing jobs which they enjoy, in which they feel that their skills/abilities are being utilised to the full, and of which the end products are worthwhile and are appreciated.
- ❖ Many people are interested in the likelihood of receiving training (in learning something new, e.g. about and how to use computers).
- ❖ Some people like the opportunity of working in a group.
- ❖ Some people are interested in the prospects for promotion, in achieving positions of responsibility and authority or status.
- ❖ Other people might seek jobs in which they can use initiative or can get away from being “desk bound” or tied to a routine or regular hours.

So you can see that the range of motivations can be great, and of course more than one (different) motivation might stimulate a particular person or group of people. However, a manager must endeavour to get the best from **each** individual member of his or her team, which might require the motivating of different team members in different ways, whilst still motivating **the team as a whole**. The latter requires the building of a **good** “*working atmosphere*” based on a spirit of trust and co-operation between management and staff.

Good working conditions help in generating a good working relationship; and although a junior manager or supervisor might have little control over conditions (or say in the matter of salaries/wages, overtime, holidays, etc) the staff must be able to trust their superior to put their case, whenever possible, to his or her immediate superior. There should be two-way communication, and staff must be kept fully informed about matters which affect their working conditions and their livelihoods. Job security is important in forming a good working atmosphere and in encouraging employees to work well.

Subordinates want to know that they are **not** looked upon as mere “work units” or “production units” but as **human beings**, and that their manager(s) are genuinely interested in them as such. They require - and have the right to expect - an evenhanded, fair, unbiased approach from their managers, in addition to that essential quality called ‘**leadership**’. It is important to appreciate that successful motivation by a good manager produces a measure of self-discipline in his or her staff; they will have sufficient self-respect, and loyalty to that manager to work well and willingly. So we can see that proper motivation instils a good mental attitude towards work, which mere financial incentive cannot “buy”.

Controlling

Controlling is that function of management which checks whether what was planned to happen actually **does** happen, and also, if necessary, ensures that corrective action is taken. Within this framework it can be seen that the work of all staff must be supervised and checked (and that further instructions, guidance or training is given when needed); and that all operations or processes must be checked or inspected, and performance measured against the targets set in the plans and against

set standards.

A '**standard**' in this context means a level to be aimed at, or a measure with which other must conform, or by which the accuracy of others is judged. A business letter is a simple example of what is meant by this. Certain standards will be set down which the letter must meet: concerning the type, size and colour of paper on which it is to be typed; the layout of the typed work; the positions of the addressee's name and address, the date and the reference; whether paragraphs are to be indented; whether lines are to be justified; whether the signer's name and/or designation are to be typed - and the typed letter will be expected to reach certain standards of neatness, without spelling mistakes, erasures, smudges or over-typing. (All these features are dealt with at length in Module 8, on business letters.)

Controlling includes ensuring that employees perform the work allocated to them in the ways laid down, and with no wastage or duplication of time, effort or materials. This involves much more than simply instructing a given number of employees to perform work; they must be supervised and managed so their efforts achieve the desired results, and this requires, as explained, that they be motivated, checked, guided, taught and encouraged. All employees are human beings, with human failings, and their efforts cannot simply be "switched on or off" like a light bulb; and they look towards, indeed depend upon, their managers for direction.

An important part of the function of controlling entails the maintaining of **records of performance**. Such records, whether concerning receipts, issues, sales, production, output, etc, are vital as a guide to future planning - by the Office or by other departments - and in the setting of new or revised standards. Daily or weekly or monthly reports to higher management provide vital information which enables control to be exercised over all the activities of the enterprise, and assists in the co-ordination of the efforts of the enterprise as a whole.

In practical, everyday management, the five functions - which we have described separately to make them easier for you to understand - might not be apparent or recognisable as being distinct from one another. That is because they together form one continuous process, in which the individual functions blend, run into and interrelate with one another. That is as it should be; management should **not** be a job which a person has to force himself or herself to perform, step by step, but should be a task which flows, without conscious thought; stemming from experience, training and an understanding of human nature.

Practical Example

To illustrate that the five functions are distinct, and how they work together in practice, let us consider an example of a business letter:-

- * A letter must be dictated, typed and sent to an important client/customer. The manager concerned decides what he must state in the letter, and makes brief notes of the topics to be covered in it and the order in which he will deal with them (**planning**).
- * He explains to his PA/secretary the reason for the letter and its importance, and the need for an accurately typed, neat and well laid-out letter, and gives her any additional instructions necessary, about the number of copies, etc. During the course of the dictation, he will assist her with the spelling of any long or unusual words and technical terms, and will repeat any figures to ensure accuracy (**motivating**).
- * He will check that she has the correct stationery on which to type or print the letter, that her machine (whether typewriter, computer or word processor) is clean and in good working order, and that she will not be disturbed during the typing of the important letter and, if necessary, he will arrange for

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her general, routine work to be performed by another typist (**organising** and **co-ordination**).

- * Once the letter has been typed, he will check it to ensure that the layout is correct, that no typing or grammatical errors have been made, that any enclosures necessary are attached, and that the correct size envelope has been correctly typed; and that at least one copy of the letter has been typed to retain as a record on file (**controlling**).

The foregoing is a very simple example of management - relevant to an office manager - but it enables you to see clearly the five functions independently, and also to see that the "technical" aspect (a knowledge of what actually has to be stated in the letter) is quite distinct from the "human" aspect of the work of the manager. These and other matters are developed further in the Modules dealing with the management of office personnel.

Note: For simplicity, in this Program we sometimes refer to a manager (and an office manager) as being male. However, we ask you to read the word "*he*" as being "*he or she*", and the word "*his*" as being "*his or her*". No disrespect whatsoever is intended to the many women who make excellent office supervisors, office managers and administrators.

SELF-ASSESSMENT TEST ONE

Recommended Answers to these Questions - against which you may compare your answers - are page 20. The maximum mark which might 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. Why is it essential not only for the Office to be well-managed, but for it to be seen to be so? In what ways can an Office prove its efficiency and its value to the enterprise of which it forms part? (maximum 30 marks)

No.2.(a) What are plans, and why are they essential in management? (maximum 15 marks)

(b) Comment on the relationship between organising and co-ordination. (maximum 15 marks)

No.3. Explain the importance of the correct motivation of subordinates by managers and supervisors. (maximum 30 marks)

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No.4. Place a tick in the box ☒ against the **one correct** statement in each set.

(a) *The activity of management is:*

- 1 ☐ a small or large group of people who have been placed in charge of an enterprise.
- 2 ☐ concerned with forcing employees to work long and hard.
- 3 ☐ the way in which a business is run on behalf of its shareholders.
- 4 ☐ concerned with the efforts of the employees of an enterprise in achieving its objectives.

(b) *The managerial function of controlling includes:*

- 1 ☐ telling staff to start work at specific times of day or night.
- 2 ☐ ensuring all staff know who their managers and supervisors are.
- 3 ☐ restricting access to the premises of the enterprise or areas of it.
- 4 ☐ the maintenance of records of performance for future reference.

(c) *The interpretation of policies by an office manager requires him or her to:*

- 1 ☐ put them into practice to achieve the objectives set for the Office.
- 2 ☐ study carefully the documents issued by insurance companies.
- 3 ☐ translate instructions into the language(s) understood by the various members of the Office staff.
- 4 ☐ examine them and decide what tasks and activities will be involved in implementing them in practice.

(d) *In management a standard can be:*

- 1 ☐ the national flag being flown on important occasions.
- 2 ☐ a level to be aimed at or a measure which performance must match.
- 3 ☐ levels of education reached by or examinations passed by employees.
- 4 ☐ the means of checking that managers are performing their duties.

(e) *Many office staff members seek "job satisfaction", which means that:*

- 1 ☐ they perform their duties in the most efficient ways which are acceptable to their managers.
- 2 ☐ they perform work which they enjoy doing, and which they feel is worthwhile.
- 3 ☐ they receive the maximum financial rewards for their efforts.
- 4 ☐ they can work at their own pace, without supervision.

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

RECOMMENDED ANSWERS TO SELF-ASSESSMENT TEST ONE

No.1. The Office of any enterprise is delegated the responsibility for performing certain work and for providing a range of services which are essential for the smooth running and efficiency of other sections or departments of that enterprise. That work needs to be performed well and accurately, and the services required need to be provided efficiently; only good management can ensure that transpires. In many enterprises the Office is considered to be "nonproductive" - as it does not contribute directly to producing products or income - and its work and services are in the main "intangible", that is, only their results can be seen or felt.

It is therefore essential that good office management ensures that office work is performed quickly and accurately and that office services are provided rapidly and efficiently to those who require them. In that way, the beneficial effects of the Office will be seen and felt throughout the entire enterprise, and the Office and its executive will receive the appreciation and respect warranted.

No.2. (a) Plans are routes to the attainment of objectives; planning involves making decisions on what course(s) of action is/are to be taken. Planning is essential in management, particularly in business, because management is concerned with ensuring that the objectives of an enterprise are attained, within the framework of the policy laid down. Without plans, what work is performed in an enterprise might be performed in a haphazard way without regard to the objectives set or to consequences; and it might be based on guesswork and whims. Only considered, predetermined plans can ensure that all operations proceed according to a set of guidelines leading to the attaining of the objectives to be achieved which, in the cases of businesses, include the making of profits.

(b) Organising is the function of management concerned with putting plans into operation; using the physical resources available in the most effective and efficient way to ensure the achievement of the objectives of the enterprise. The aim of organising is to ensure that the right personnel, the right materials and the right equipment are in the right places at the right times in the right quantities. Co-ordination is frequently an adjunct or continuation of organising, as it involves ensuring that all efforts mesh smoothly together and move in the same direction, towards the attainment of the objectives set.

No.3. Motives are factors which induce people to act in certain ways or to take certain actions. A manager, whatever the functional aspects of his (or her) job, is concerned with ensuring that his subordinates work hard and efficiently, with maximum effort towards the attainment of the objectives set. To achieve that result, he must ensure that his team works not only hard, but also willingly, and that requires motivation - the supply of the correct motives. But what might motivate one person or group of people might not motivate another, and a manager must therefore, from experience and observation, apply the correct motivation to each individual team member. Unless each member of the team works well and willingly, the manager will not be able to get the team as a whole to do so. A satisfied, contented and correctly motivated team is likely to be an efficient, hard working team.

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

- (a) 4✓ (b) 4✓ (c) 4✓ (d) 2✓ (e) 2✓

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WHAT YOU WILL LEARN IN MODULES 2 TO 12 OF THE CIC TRAINING PROGRAM ON OFFICE MANAGEMENT/ADMINISTRATION

Module 2 - The Office Environment

The modern world of commerce and industry:

- the public sector
- the private sector

Types of enterprises:

- industrial
- trading
- service-providing
- multi-activity
- the interdependence of enterprises

The organization of enterprises:

- line organization
- functional organization
- line and staff organization

Organization charts:

- their purposes
- updating

Office location:

- centralisation
- decentralisation

Office layouts

- multi-room
- open-plan
- combination layouts

Providing the best Office working environment:

- avoidance of overcrowding in the Office
- minimisation of staff movement
- Organization and Method Studies
- minimisation of noise distractions
- providing suitable lighting
- ventilation
- heating and/or cooling
- walls and ceilings
- floor coverings
- cloakroom facilities

The importance of adequate supervision:

- spans of control

Prevention of accidents in the Office

Office furniture and furnishings:

- utility
- cost
- image
- status
- standardisation
- office desks:
 - matters to be considered

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office chairs:
desirable features

Module 3 - Office Activities and Responsibilities

Gathering information:

- internal sources
- external sources

Recording information:

- what records
- their importance

Collating, analysing and presenting information:

- formats

Storing information - filing:

- what filing involves
- desirable features of filing systems
- forecasting filing requirements
- tracers or out guides
- centralised filing
- decentralised filing
- training filing personnel:

- personal attributes required

- filing schemes:

- alphabetic
 - numeric
 - geographic,
 - chronological
 - subject

- cross referencing

- indexes

Record retention:

- the retention policy
- microfilming

Filing equipment:

- vertical filing
- lateral filing
- loose cards
- visible cards

Communicating information - communication:

- definition of communication
- the necessity for two-way communication
- importance to enterprises of effective communication
- vertical communication:

- passage of information and instructions downwards

- passage of information upwards

- avoiding reliance on the grapevine

- horizontal communication:

- its concern with information

- ensuring an uninterrupted flow

- establishing and maintaining effective lines of communication

- external communication

the principles of effective communication:

- identifying the sender and intended recipient(s)

- selecting the best method of transmission

- ensuring correct interpretation of messages

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- providing for feedback
- changing roles from sender to receiver
- removing obstructions

The Office as an aid to administrative control

Module 4 - The Management of Personnel (1)

The importance of selecting, training and retaining good staff

Recruitment of personnel:

- internal recruitment:

 - what it can involve

 - avoiding problems

- external recruitment:

 - sources of recruits which might be available

- job analysis;

 - its purpose

- job descriptions:

 - why they are prepared

 - information they might contain

- employee specifications:

 - reasons why they are prepared

 - personal attributes which might be sought

- advertising to fill employment vacancies;

 - classified advertisements

 - display advertisements

- employment application forms:

 - design and layout

 - information which might be requested

 - helping applicants complete them properly

 - a specimen examined

- attachments to application forms:

 - testimonials/recommendations from previous employers

 - certificates and/or diplomas

 - CV's

The selection process:

- employment interviews

 - their importance and aims

 - advance planning

 - conducting interviews for the best results

- selection tests

Appointment;

- the letter of appointment

- terms and conditions of employment

Trial or probationary periods

Module 5 - The Management of Personnel (2)

The induction process:

- its aim and importance

- showing the newcomer around

- introductions to the workgroup members

- avoiding problems for the newcomer

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- assessing progress
- developing good relations

Training:

- what on-the-job training might involve
- simplifying the tasks to be taught
- methods of training
- advantages of continuous training

Remuneration:

- meaning
- salary based on time
- overtime payments
- payment based on quantity
- benefits and entitlements:
 - paid holiday/vacation time
 - sickness benefit
- management's two-edged problem in formulating an acceptable policy
- types of remuneration

Flexible working time:

- "flexitime" in practice
- benefits claimed

The shorter working week

Job evaluation:

- what is involved

Job ranking and grading:

- their aims
- rating according to:
 - ability, knowledge, skill, experience

The manager and subordinates:

- the need for an honest, fair and unbiased approach
- the need for understanding
- displaying interest in subordinates
- setting good examples
- providing encouragement
- delegation of responsibility:

Disciplinary action

Employee counselling:

- what it should involve
- its benefits

Resignations:

- unavoidable resignations
- avoidable resignations

Employees' representatives:

- trade unions
- white collar unions
- staff associations

Equal opportunities:

- in practice
- legislation

Module 6 - Office Machines, Computers and Telecommunications

The use of machines in administration:

- typewriters and word processors
- photocopiers

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- facsimile (fax) machines
- adding/calculating machines
- pocket calculators

The general rule for the provision of machinery and equipment:

- factors to consider in deciding what to buy or rent

Possible problems with highly skilled/trained personnel

Difficulties with sophisticated machines and equipment

Computers:

- as machines

- as aids to management/administration

- important characteristics

- hardware:

 - descriptions and illustrations of the main parts

- software - programs:

 - tailor-made

 - applications packages

 - database packages

- database systems:

 - using shared data

- a manually performed and computerised task compared

- how a computer works:

 - input, storage, arithmetic, output, logic, processing, control

The importance of accurate data

Peripherals or terminals:

- for input, for output, for storage

Data security:

- passwords and security codes

- backup copies

- protection against viruses

Developments in telephone technology:

- answering and recording devices

- portable and mobile/cell phones

- text messaging:

 - the need for clarity

Internal communication (intercom)

Fax transmission:

- uses and advantages

- fax machines and phone/fax machines

- computers with fax cards

Communication by computer:

- the modem

- dial-up connection

- ADS and broadband:

 - advantages

- remote access - VPN connection:

 - the firewall

 - benefits

The Internet - the worldwide web:

- its increasing importance in communication

- internet service providers (ISP)

- websites and website addresses

Email:

- advantages over other methods

- the local area network (LAN)

- email addresses

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- emails via the Internet
- email packages:
 - standard features and facilities
- Computer viruses:
 - the need for protection
 - antivirus software
- Bar codes
- Magnetic strips
- Smart cards
- OCR and scanning
- The telephone system
- The electronic office

Module 7 - Forms and Business Documents

- Forms as the basic 'tools' of Office work
- The many and varied uses of forms
- Factors involved in designing a form:
 - the information really needed
 - sizes of spaces required for information
 - logical and coherent sequence
 - standardisation of layout
 - catering for filing
 - the presentation
 - codes or reference numbers
- The proper and accurate completion of forms:
 - guidance notes on completion
 - reducing work in form completion:
 - ticks, crosses, boxes
 - training staff on form completion
- Copies of forms:
 - factors to consider
- Serial numbers
- Computerised forms:
 - files, records and fields
 - master and movement data
 - file updating
 - manual and computerised invoice systems compared
- The Office's responsibilities as regards forms
- Indexes of forms:
 - maintaining them up to date
- Common forms and business documents:
 - descriptions, uses and illustrations of:
 - form-type business letter
 - form-type reply letter
 - quotations
 - estimates and tenders
 - orders and order forms
 - acknowledgements of orders
 - invoices
 - proforma invoices
 - credit notes
 - statements of account
 - bank cheques/checks:
 - counterfoils

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- pay-in or deposit slips:
- counterfoils
- receipts for payments
- petty cash vouchers
- delivery notes
- goods received notes
- series of documents

Module 8 - Business Letters, Memoranda and Reports

Differences between business letters and 'personal' letters

Objectives of business letters

The style or tone of business letters

A typical specimen business letter examined:

- the letterhead

- the date

- its addressee

- the writer's designation

- the greeting

- references

- the message - the body of text

- the closing

Layout of business letters:

- indentation

- block

- justification

Importance of attractive appearance of business letters

Pre-planning letters

The advantages of drafting:

- to seniors

- to juniors

Stock sentences and paragraphs

Stock letters

Annotations:

- building complete letters

References on business letters:

- why they are used

- constructing them

Postscript to letters

Memoranda:

- when and why they might be used

- ways in which they differ from business letters

- specimens

Reports:

- routine reports

- special reports

- obtaining and compiling information for reports

- features of good reports

- prior information needed

Module 9 - Dictating and Checking Letters, Outgoing Mail

What dictation involves

Systems of shorthand and abbreviated writing:

- Pitman's shorthand

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- Gregg shorthand
- T-line
- Speedwriting
- Palantyping
- Taking down notes
- Transcribing notes
- Dictating to shorthand typists, stenographers and palantypists
 - good dictation as a joint effort
 - giving assistance to ensure satisfactory results
 - ensuring accuracy
- Dictating into a machine:
 - special points to observe
 - the audio-typist:
 - special needs
- Checking typed letters and other documents:
 - types of typing errors to look for - examples
 - problems if they are missed
 - features to be checked:
 - addressees name and address
 - the date
 - references
 - spelling and punctuation
 - layout
 - typing and general appearance
 - figures and specific details
 - copies
 - enclosures/ attachments
 - envelopes:
 - correct sizes
 - colours
- Typists
- Packing for despatch
- Despatching - outgoing mail:
 - methods of despatch by post:
 - by air
 - by surface
 - sealed and unsealed envelopes
 - postage rates
 - different types of mail
 - letters
 - packets and parcels
 - postcards
 - special postal services:
 - certificate of posting
 - recorded delivery
 - registration
 - express
 - letter balances and scales:
 - electronic scales
 - postage stamps
 - franking machines
 - other post room equipment
 - the despatch department:
 - controlling post room staff
- Other methods of despatch/transmission:
 - faxes and emails

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Module 10 - Incoming Mail, Meetings, the Reception

Incoming mail:

- types of mail
- collections from private post boxes or bags
- deliveries of mail
- procedures on receipt of incoming mail:
 - the preliminary sort
- mail likely to contain money
- slitting of envelopes:
 - letter-opening machines
- contents of envelopes/wrappers
- date-stamping
- sorting of contents:
 - distribution of sorted mail

Meetings:

- informal meetings
- formal meetings:
 - how they differ from informal ones
- notices of meetings:
 - the date and time
 - the venue
- agendas:
 - what they may contain
 - why they are circulated
 - preparation and circulation
- procedures during meetings:
 - the role of the chairman
- minutes of meetings:
 - why they are prepared
 - types of information contained
 - methods of preparation
 - distribution
- arrangements which may have to be made
 - prior to and during meetings
- Conferences and conventions
- The reception:
 - attention required to the area
 - furniture and furnishings
 - selection and training of receptionists
 - main duties of reception staff:
 - welcoming and directing visitors
 - supplying information
 - maintaining records
 - making appointments
 - accepting deliveries
 - Telephone operators

Module 11 - Word Processing, Desktop Publishing, Computerisation

Word processing:

- advantages of WP over typewriting:
 - saving typing time
 - text storage

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- avoiding the need for complete retypes
- standard features of WP software
- spelling check
- Thesaurus facilities
- personalising circular letters by WP
- types of printers:
 - selecting the best for the job
- training staff on WP:
 - why retraining might become necessary
- Desktop publishing:
 - purpose of DTP
 - differences between DTP and WP
 - training requirements for DTP operators
- Why computerisation might be embarked upon
- Analysing the needs of the enterprise
- Identifying the areas to be affected:
 - evaluating the options
- Producing the requirements statement
- Evaluating the proposals:
 - making the final decision

Stationery and Printing

- The value of stationery and printed materials
- Ordering stationery items:
 - orally by telephone or in person
 - using order forms
 - by letter
- Orders for printed items:
 - reprints
 - new jobs
 - proof checking
- Internal printing:
 - litho machines
- Storing stationery and printed items
- Dangers against which protection is needed
- Stock records:
 - stock record cards
 - the need for accuracy

Module 12 - Financial Matters

- Principles and basic rules of double-entry bookkeeping
- Books of account:
 - the ledger:
 - ledger accounts
 - debit and credit sides
 - the cash book:
 - records of cash and bank transactions
 - the sales book:
 - what it records
 - source documents
 - the purchases book:
 - what it records
 - source documents

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- the returns books:
 - what they record
- the journal:
 - what it records
- Final Accounts:
 - why they are prepared:
- Trading Accounts:
 - gross profit or loss
- Profit & Loss Accounts:
 - net profit or loss
- Balance Sheets
- Cashiering work:
 - receipting payments received over the counter and by post
 - banking
- Checking and passing bills for payment:
 - matters to be checked
- Issuing/drawing cheques/signing
- Cheque security:
 - crossing
- Cashing cheques:
 - security necessary with open cheques
- Petty cash:
 - for what it is used
 - the ordinary system of keeping petty cash
 - the imprest system of keeping petty cash
 - the petty cash book:
 - analysis columns
 - security of petty cash
- Budgets and budgetary control:
 - what budgets are and why they are prepared
 - budget review statements:
 - contents and uses
 - investigating variances from budget allocations