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<tbody>
<tr>
<td>1</td>
<td>1. The secretarial career</td>
<td>1.1 State the importance of the post of secretary/management assistant, name the job titles used for this post and to write at least three job descriptions for the lower, middle and higher levels of secretary/management assistant posts.</td>
</tr>
<tr>
<td></td>
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<td>1.2 Name the specialist fields of secretarial work.</td>
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<td>1.3 State the effect of the information era on the status of the secretarial career.</td>
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<td>1.4 Explain the effect of technological aids on the performance of a secretary/management assistant.</td>
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<td>1.5 By means of a diagram, explain the promotion route of a management assistant from the post of junior secretary through to personal assistant.</td>
</tr>
<tr>
<td>12</td>
<td>2. Career opportunities</td>
<td>2.1 Compile a comprehensive list of employment sectors, both private and public, where secretaries/management assistants could find employment.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2.2 Compile a list of possible sources of available posts in the secretarial field.</td>
</tr>
<tr>
<td>13</td>
<td>3. The role of the secretary/management assistant</td>
<td>3.1 Give a comprehensive description of the role of the secretary/management assistant in terms of tasks, duties and responsibilities regarding management, customers, other staff and colleagues.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4.2 Explain the effect of a secretary’s/management assistant’s appearance, image, grooming and efficiency on the corporate image of the concern.</td>
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<td></td>
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<td>4.3 Explain and, where applicable, practically demonstrate the guidelines/rules regarding posture, weight, rest and sleep, hygiene, hair grooming, cosmetics, teeth, hands and good health.</td>
</tr>
<tr>
<td>22</td>
<td>5. Personal traits</td>
<td>5.1 Explain and demonstrate in simulated office situations the basic rules and where applicable, techniques for the following personal traits required from a secretary/management assistant:</td>
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<tr>
<td></td>
<td></td>
<td>• memory skills (especially to remember names and other office detail)</td>
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<td></td>
<td>• punctuality (especially in execution of tasks) and diligence.</td>
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<td></td>
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<td>• know firm’s policy and adapt to it</td>
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<td></td>
<td></td>
<td>• pleasant personality and cooperation with others</td>
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<td></td>
<td></td>
<td>• drive and ambition</td>
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<td></td>
<td></td>
<td>• professional conduct</td>
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<td></td>
<td></td>
<td>• good judgement</td>
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<td></td>
<td></td>
<td>• neatness and orderliness</td>
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<tr>
<td></td>
<td></td>
<td>• eagerness to learn and assume more responsibility</td>
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<tr>
<td></td>
<td></td>
<td>• vision, imagination and resourcefulness</td>
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<tr>
<td></td>
<td></td>
<td>• ability to work under pressure</td>
</tr>
<tr>
<td>25</td>
<td>6. Interpersonal skills and human relations</td>
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<tr>
<td>6.1 Explain the secretary’s/management assistant’s personal relations with all levels of management (supervisory, middle and top) and other staff with special reference to attitude, office feuds, shirking, gossip, office relationships and absence from work.</td>
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<td>6.2 Briefly explain and, where feasible, practically demonstrate the basic rules and techniques of the interpersonal skills and human relations applicable to the following:</td>
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<td>• the work partnership between the manager and the management assistant</td>
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<td>• working for more than one manager</td>
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<td>• working in a team</td>
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<td>• assertive skills</td>
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<td>• decision-making skills</td>
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<td>• intercultural relations</td>
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<td>• acting as representative of the firm</td>
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<td>• greeting of people, using/remembering names and titles, secrecy and thoughtfulness</td>
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<thead>
<tr>
<th>29</th>
<th>7. Career advancement</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.1 Briefly explain career path planning and setting of professional goals for the post of secretary/management assistant.</td>
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<tr>
<td>7.2 Briefly explain the contribution of further qualifications, in-service training, special courses, task enrichment, task expansion, professional associations and career networking towards career advancement for secretaries/management assistants.</td>
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<tr>
<td>7.3 Explain and demonstrate in a simulated situation how to present yourself, promote yourself and motivate your own promotion to a higher post level.</td>
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<tr>
<td>7.4 List ten rules applicable to secretaries/management assistants in the creation of promotion opportunities and name the traits and qualities which make an employee indispensable.</td>
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<tr>
<td>7.5 Name the sources of promotion opportunities.</td>
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</table>

**DIDACTIC DIRECTIVES:**

1. Role play sessions are valuable in developing confidence in any of the practical topics in this module.
2. Case studies could be set to assess students’ ability to apply the acquired knowledge of the secretarial career.
3. Learning content 1 – The secretarial career

Although students may compile formal job descriptions of the different secretarial/management assistant posts, they have to be informed of the fact that in the smaller concerns, persons employed in these posts may be given diverse functions because of the limited number of employees. Prospective secretaries/management assistants will have to adapt to such employment conditions.
Group work could be utilized for project work by students. Groups (4-5 students per group) could, for instance, each be allocated a specialization field of secretarial work (see learning content 1) and compile lists of job designations and job descriptions from magazines, newspapers, employment agencies, business concerns, etc. During group discussions in the classroom this information may be exchanged by the students. Lecturers could make use of organograms to explain the hierarchy of posts in an organization and especially of posts in the secretarial field.

4. Learning content 2 – Career opportunities
Group work could also be utilized for this learning content. Groups could, for instance each be allocated a different employment sector and instructed to collect information from magazines, newspapers, employment agencies, employers, etc. This information may then be exchanged during group discussions in the classroom.

5. Learning content 3,4,5 and 6 – Role of the secretary/management assistant, Image and grooming, Personal traits and Interpersonal skills and human relations.

Information on these topics could be obtained from various textbooks and magazines and could further be elaborated on by means of video programmes. These topics are also most suitable for the utilization of the expertise of secretaries/management assistants, personnel officers/managers and managers. For the topics on image and grooming the services of specialists like a colour analyst or a beautician may be acquired. (Examples of sources in this connection are Dress Right for Business – Nancy Yolden; Colour me Beautiful – Carole Jackson; Colour right dress right – The Total Look by Lize E London and Anne H Adams.)

Lecturers must endeavor to develop the personal traits and interpersonal skills and human relations in their students in the course of the instructional period. Role play and videos should be used extensively.

A special effort must be made to develop the much sought after memory skills. A source which may be used is Memory Skills in Business by Madelyn Burley-Allen.

6. Learning content 7 – Career advancement
The following useful sources could be used for this topic:
• Preparation for your career – Jennings, Chapter 1 (on keyboarding, transcription, computer, communication, organisational, interpersonal, and decision-makings skills)
• Promote yourself – Career Success, July 1994
• Continuing to grow professionally – Jennings, Chapter 1
• Golden rules for career advancement – Career Success, July 1994

### Module 2: Telephone Techniques and Telephone Aids

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<th>Learning Content</th>
<th>Learning Objectives</th>
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</thead>
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<td>1. Basic knowledge of telephone systems</td>
<td>1.1 Name the controlling body of the SA telecommunication services and briefly state the function of the Department of Posts and Telecommunications in this regard.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1.2 Give a very short explanation of the following systems/functions/services:</td>
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<td></td>
<td></td>
<td>• PABX</td>
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<td></td>
<td></td>
<td>• Telex/Teletex</td>
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<td></td>
<td></td>
<td>• Teleconference</td>
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<td></td>
<td>• Videoconference</td>
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<td></td>
<td>• Voice mail</td>
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<td></td>
<td></td>
<td>• Answering devices</td>
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<tr>
<td></td>
<td></td>
<td>• Mobile telephones</td>
</tr>
<tr>
<td>Page</td>
<td>Section</td>
<td>Content</td>
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<td>------</td>
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</tr>
<tr>
<td>41</td>
<td>2.</td>
<td>The importance of the telephone in business</td>
</tr>
<tr>
<td></td>
<td>2.1</td>
<td>Explain why the telephone system is of such importance to the business world.</td>
</tr>
<tr>
<td></td>
<td>2.2</td>
<td>Explain what contribution the secretary/management assistant can make towards the corporate image of the undertaking when using the telephone.</td>
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<tr>
<td></td>
<td>2.3</td>
<td>Explain the technique and/or procedure and demonstrate in a simulated office situation correct telephone etiquette, correct telephone speech and the proper way of putting a caller through to the correct person.</td>
</tr>
<tr>
<td>43</td>
<td>3.</td>
<td>Telephone aids</td>
</tr>
<tr>
<td></td>
<td>3.1</td>
<td>Explain the contribution of and, in a simulated office situation, demonstrate the use of the following telephone aids correctly:</td>
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<tr>
<td></td>
<td></td>
<td>• Telephone directories</td>
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<tr>
<td></td>
<td></td>
<td>• Other business directories</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Personal telephone index</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Time zone maps</td>
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<td></td>
<td></td>
<td>• Phonetic alphabet</td>
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<td></td>
<td></td>
<td>• Message form pad</td>
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<td></td>
<td>• Slip-free telephone mat</td>
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<tr>
<td></td>
<td></td>
<td>• Other telephone stationery</td>
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<td></td>
<td></td>
<td>• Other sundry telephone aids</td>
</tr>
<tr>
<td>45</td>
<td>4.</td>
<td>Techniques for receiving calls</td>
</tr>
<tr>
<td></td>
<td>4.1</td>
<td>Explain the importance of the image projected by the receiver when answering the telephone and indicate the role the voice and businesslike attitude play in this regard.</td>
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<tr>
<td></td>
<td>4.2</td>
<td>Briefly explain the requirement of effective telephone communication regarding the following and demonstrate these requirements by applying them correctly during simulated telephone calls in the practicum room by means of role play:</td>
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<tr>
<td></td>
<td></td>
<td>• Vocal personality</td>
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<td></td>
<td></td>
<td>• Talk on a conversational level</td>
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<td></td>
<td></td>
<td>• Talk clearly</td>
</tr>
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<td></td>
<td></td>
<td>• Talking speed</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Friendliness</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Sincere interest</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Knowledge of subject</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Nasal modulation</td>
</tr>
</tbody>
</table>
### 4.3
Explain fully and in a simulated office situation, demonstrate the following techniques for receiving telephone calls correctly:
- Answering promptly
- Giving proper identification
- Be courteous
- Taking messages
- Transferring calls properly
- Answering a second telephone
- Screening calls
- Getting messages to your manager promptly
- Protocol – who waits for who / break in communication
- Handling the situation when your manager is not available or does not wish to speak to the caller
- Handling difficult callers – inquisitive, ill-mannered, arrogant, harassing
- Handling the situation where the secretary/management assistant knows the answer to an inquiry
- Handling a call which was put through incorrectly
- Confidentiality of information – what to say and what not to say
- Principles of efficient telephone usage by receiver of a call

### 5. Techniques for making calls

#### 5.1
Explain fully and in a simulated office situation, demonstrate the following techniques for making telephone calls correctly:
- Preparing to call – name of firm, name of person, telephone number, time zones, time of the day, information required, files/information ready, manager available and ready
- Making (and booking) the call – dial correctly, identify caller, purpose of call, protocol, transfer call promptly, make notes, obtain full information to prevent a follow-up, end promptly and with style, complete record/log of long distance telephone calls
- Follow-up – gather information, send information, round off

### 6. Emergency services and security

#### 6.1
Construct information for an office procedure manual on guidelines for the following emergencies:
- Fire
- Bomb scare (including a questionnaire to be used)
- Injuries to staff (minor and major)
- Heart attacks, strokes, epilepsy, fainting (brief summary only)

#### 6.2
In a role play situation, and using a mock telephone, demonstrate how to handle a reported fire and a telephonic bomb scare (plus questionnaire) correctly and proficiently.

#### 6.3
Explain the guidelines for the maintenance of security regarding confidential business information during telephone enquiries.
DIDACTIC DIRECTIVES:
1. It is absolutely essential that each student should become proficient in correct telephone etiquette, and receiving and making telephone calls. Students must be afforded ample opportunities during practical sessions to master these skills. Role play will have to form an integral part in dealing with the learning content of this module.
2. Apart from observation during visits to business concerns, use could also be made of video programmes available on these topics.
3. The skill of students regarding the receiving and making of telephone calls can further be facilitated by means of audio tapes prepared with correct and incorrect answering of incoming and outgoing calls. Students should listen and react orally or in writing. Tape recordings of calls made and received by students will be valuable in the assessment of the acquired skills.
4. The taking of telephone messages can be practised during the practical period by simulating a telephone conversation or playing tape recordings with all the important data such as the person’s name, company, telephone number, time, instruction and the message. Students should be taught what important information has to be obtained, how to verify such information and to complete the message form correctly.
5. Marks allocated to students for telephone skills should be a clear indication of their ability to perform these procedures.
6. A valuable contribution could also be made by secretaries/management assistants and telephonists on the topic of dealing with difficult situations.
7. Lecturers must encourage students to keep abreast of the latest developments in telephone systems as it will have a bearing on their future work environment.
8. Consultants and suppliers of office equipment could be approached for demonstrations of telephone equipment.

Page in SB | Learning Content | Learning Objectives
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63 | 1. The office of the secretary/management assistant as reception area | 1.1 After studying this learning content in a textbook and after having viewed a video on the topic or having observed the reception areas of at least two business concerns, explain the requirements for the appearance, layout and planning of a reception area in general and the office of the secretary/management assistant as reception area, in particular.
| | | 1.2 Explain steps to be taken by secretaries/management assistants to ensure the security of documents/confidential documents in her office during and after office hours.
| | | 1.3 Explain the procedure to be followed and precautions to be taken when receiving parcels at the reception desk.
68 | 2. The secretary/management assistant as receptionist | 2.1 Explain the scope of the function of the secretary/management assistant as receptionist as well as the required conduct for this function.
69 | 3. Receiving visitors | 3.1 Compile a list of at least eight practical hints on keeping a diary/diaries for appointments.
| | | 3.2 Explain the procedure to be followed when the manager cancels an appointment or changes the time.
| | | 3.3 Describe a method of keeping record of visitors and visitors’ calling-cards and, in a simulated office situation, correctly compile such a record during role play.

LEARNING OBJECTIVES
On completion of this module the student must be able to:

MODULE 3: RECEPTION AND BASIC ETIQUETTE
<table>
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<th>Page</th>
<th>3.4</th>
<th>Explain the basic guidelines for secretaries/management assistants to protect the manager from unwanted visitors.</th>
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<tbody>
<tr>
<td></td>
<td>3.5</td>
<td>Explain fully and in a simulated office situation, demonstrate the procedure for receiving, admitting, and where necessary, handling the following types of visitors:</td>
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<td></td>
<td></td>
<td>• Visitor with appointment</td>
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<td>• Visitor without an appointment</td>
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<td>• Petulant/ill-mannered visitor</td>
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<td>• Curious visitor (espionage)</td>
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<td>• Talkative visitor</td>
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<td>• Visitor who has to wait</td>
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<td>• Visitor with a complaint about the service or a product</td>
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<td>• Visitor who wants to collect money or market a product</td>
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<td>• Visitor who wants to apply for a post</td>
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<td>• Visitor who falls ill or injures him/herself</td>
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<td>• Visitor the manager does not want to receive</td>
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<td>• The visitor who wants to speak to the manager only</td>
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<td>• The visitor who can be assisted more effectively by another staff member</td>
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<td>• Family, friends or acquaintances who want to speak to the manager</td>
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<td>3.6</td>
<td>With the aid of an organizational diagram showing departments and managerial staff, a staff list with office or room numbers and a ground plan of the layout of the building, give directions, both orally and in writing, to assist visitors in finding a certain office, person, work area or facility in a multistorey building.</td>
</tr>
<tr>
<td>77</td>
<td>4</td>
<td>Introductions</td>
</tr>
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<td></td>
<td>4.1</td>
<td>Explain and demonstrate correctly in a simulated office situation the protocol and procedure for introducing people/customers/guests in general and for introducing visitors to the manager in particular.</td>
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<td>79</td>
<td>5</td>
<td>Invitations and serving refreshments</td>
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<td></td>
<td>5.1</td>
<td>Elucidate on the role of the secretary/management assistant in sending out invitations and the serving of refreshments in the office.</td>
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<td>5.2</td>
<td>Briefly explain how the serving of refreshments should adapt to the occasion and list the basic rules of table etiquette.</td>
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<td>5.3</td>
<td>After having studied the rules for invitations and basic etiquette and after having applied these rules practically during a class project, correctly plan and execute as a group/class project the invitation of, for instance, business women/men to a formal tea (including the decision on the theme, the sending out of invitation cards, doing the table lay-out and serving the refreshments).</td>
</tr>
</tbody>
</table>
83 6. Posture and conduct 6.1 Explain and correctly demonstrate during a simulated office situation the following aspects of posture and conduct when receiving visitors:
- Reflecting the corporate image
- Professionalism
- Patience
- Hiding personal feelings and personal circumstances
- Empathy
- Winning a client for the concern by calming aggrieved visitors, giving assistance to visitors and solving visitors’ problems if it is within your ability or within the ambit of your commission/mandate

84 7. Emergencies 7.1 Briefly explain how the following emergencies should be handled:
- Armed threat
- Robbing of money

DIDACTIC DIRECTIVES:
1. It is essential that each student should become proficient in correct reception techniques. Students must be afforded ample opportunities during practical sessions to master these skills. Role play will have to form an integral part in dealing with the learning content of this module.
2. Apart from observation during visits to business concerns, use could also be made of video programmes available on these topics.
3. Diary management skills could be further enhanced by means of the “in-basket” method.
4. The simulation of situations by means of role play can be applied to refine reception techniques and develop the ability to observe. Students can, for example, observe during role play the wrong procedures of reception acted out by students, and indicate the correct procedures either orally or in writing. The same procedure can be followed in dealing with various types of visitors.
5. Should students find it difficult to direct visitors to a specific office, it is recommended that they be asked to go to the specific office and write down whatever route they had to take. Thereafter they could explain this route orally.
6. The correct procedures and behavior when receiving visitors, the tidiness of the receiving area and the desk as well as the importance of a good first impression should be strongly emphasized.
7. The etiquette rules for serving tea/refreshments and a cocktail should be emphasised.

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<tr>
<td><strong>Module 4: Meetings, Conferences and Travel Arrangements</strong></td>
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</tbody>
</table>
| 87 1. Important concepts | 1.1 Briefly explain and, where applicable, illustrate with the aid of examples the following concepts in connection with meetings:
- Types of meetings
- Constitution
- Legal requirements for a meeting
- Procedure of meetings
- Validity of the meeting
- Chairperson and vice-chairperson
- Notice and agenda
- Attendance register
- Quorum
- Motions, voting and resolutions
- Formal motions
- Amendments and counter-proposals |

xii
<table>
<thead>
<tr>
<th>97</th>
<th>2. Conferences and seminars</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1 Briefly explain the concepts conference, seminar, congress and symposium.</td>
<td></td>
</tr>
<tr>
<td>2.2 Explain and, where applicable, demonstrate in a simulated situation the secretary’s/management assistant’s duties in connection with a conference/seminar/congress/symposium with special reference to the following:</td>
<td></td>
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<tr>
<td>• Planning file</td>
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<tr>
<td>o Strategic plan</td>
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<td>o Costing and budgeting</td>
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<tr>
<td>o Briefing from manager</td>
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<tr>
<td>o Inviting key-note speaker</td>
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<tr>
<td>o Briefing meetings with other staff members involved</td>
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</tr>
</tbody>
</table>
Preparing programme outline
Choice of venue and resources
Layout of the venue (theatre style, U-shape, T-shape, class room style, etc.)
Booking accommodation
Inviting delegates
Finalising bookings
- Duties before conference/seminar/congress / symposium
- Duties during conference/seminar/congress / symposium
- Duties after conference/seminar/congress / symposium

DIDACTIC DIRECTIVES:
1. Students only need to know the terminology in connection with meetings for background purposes to better understand the proceedings of meetings in order to be of assistance to the managers.
2. Special attention should be paid to the knowledge and skills required of a secretary/management assistant to prepare for meetings, to assist the manager during meetings and to do the follow-up after the meetings. The same principle applies to the organisation of conferences and seminars by secretaries/management assistants.
3. Students should be encouraged to make use of the services of travel bureau when making travel arrangements for the manager. Students should, however, be able to make travel and accommodation bookings in areas where there are not travel bureaux.

<table>
<thead>
<tr>
<th>Page in SB</th>
<th>Learning Content</th>
<th>Learning Objectives</th>
</tr>
</thead>
</table>
| 108       | 1. Procedure for purchase of office supplies | 1.1 Briefly explain the procedure to be followed (including authorisation where applicable) and documents to be prepared by a secretary/management assistant when ordering office supplies.  
1.2 Given an order form for the purchasing/ordering of office supplies and in-basket information or a case study on stocks to be ordered, price quotations from three suppliers and the name of the person who authorises orders, take a decision on the most suitable supplier and complete the order form correctly. |
| 116       | 2. Storage of office supplies | 2.1 Briefly explain the procedure to be followed and documents to be verified when ordered office supplies are delivered by the suppliers.  
2.2 State the guidelines for the storage and security of office supplies.  
2.3 In a simulated office situation demonstrate the correct procedure for receiving ordered office supplies. |
| 117       | 3. Stock control and stock records | 3.1 Name at least 4 advantages of the control of office supplies.  
3.2 Given a stock control card for one stock item and in-basket information or a case study on existing stock, re-ordering level, stock purchased and stock issued, complete the stock card correctly.  
3.3 Explain the meaning of the concepts maximum, minimum and re-ordering level of stock items. |
3.4 List the key factors for the efficient organisation of the office supplies room.

120 4. Issuing of office supplies 4.1 State the basic guidelines for the issuing of office supplies.

**DIDACTICAL DIRECTIVES:**

1. It is recommended that the students be given the opportunity to observe the functioning of a purchasing and stores department of a business concern or view a video on this topic.
2. Copies of the required documentation for the ordering, delivery and storage of office supplies must be provided to students for practical application in the practicum room.
3. It is recommended that case studies and the in-basket method be used for this module.

<table>
<thead>
<tr>
<th>Page in SB</th>
<th>Learning Content</th>
<th>Learning Objectives</th>
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</thead>
<tbody>
<tr>
<td>123</td>
<td>Sources of information</td>
<td>On completion of this module the student must be able to:</td>
</tr>
<tr>
<td>1.</td>
<td>Sources of information</td>
<td>1.1 Briefly state what information can be obtained from the following sources and for what purpose it can be used:</td>
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<tr>
<td></td>
<td></td>
<td>• Basic reference books</td>
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<td></td>
<td></td>
<td>• Official publications and sources of information</td>
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<tr>
<td></td>
<td></td>
<td>• Libraries and databases (including electronic databases)</td>
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<tr>
<td></td>
<td></td>
<td>• Yellow pages (including electronic version)</td>
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<tr>
<td></td>
<td></td>
<td>• Telephone directories</td>
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<tr>
<td></td>
<td></td>
<td>• Post Office Guide</td>
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<td></td>
<td></td>
<td>• Postal codes</td>
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<td>• Beltel</td>
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<tr>
<td></td>
<td></td>
<td>• Banktel</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Agencies, bureau and other organisations</td>
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<td>• Information centres</td>
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<tr>
<td></td>
<td></td>
<td>• Books on vocabulary and word use</td>
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<tr>
<td></td>
<td></td>
<td>• Dictionaries</td>
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<td></td>
<td></td>
<td>• Books about people (e.g. Who’s who)</td>
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<td></td>
<td></td>
<td>• Trade and industry magazines and manuals</td>
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<td></td>
<td></td>
<td>• Travel guides and street maps</td>
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<tr>
<td></td>
<td></td>
<td>• Transport timetables</td>
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<tr>
<td></td>
<td></td>
<td>• Car hire brochures</td>
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<tr>
<td></td>
<td></td>
<td>• Periodicals and journals</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• List of agencies and consultants</td>
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<tr>
<td></td>
<td></td>
<td>• Operating manuals for office equipment</td>
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<tr>
<td></td>
<td></td>
<td>• Computer application program manuals</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Office manuals on safety and security</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Staff list and organisational diagram</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• List of conference facilities</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• List of forms of address</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• List of business organisations and government departments</td>
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<tr>
<td></td>
<td></td>
<td>• List of recommended restaurants</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Networking (personal)</td>
</tr>
<tr>
<td>132</td>
<td>Setting up an information dossier</td>
<td>2.1 List the guidelines for setting up and updating a business information dossier.</td>
</tr>
</tbody>
</table>
| 2.2 | After having collected prescribed information on a fictitious undertaking, compile a proper business information dossier to be used by a secretary/management assistant. The dossier should include, inter alia, the following:

- Names and details of key contact persons
- Major clients and vital information regarding their businesses/activities
- Business results and statistics
- List of buzz words and terminology often used
- List of frequently miss-spelt words
- Travel guides and street maps
- Transport timetables
- Car hire brochures
- Staff list and organisational diagram
- List of conference facilities
- List of forms of address |

| 133 | 3. Gathering and processing of information |

| 3.1 | Briefly explain the procedure a secretary/management assistant will follow on receiving an instruction from the manager to compile a report or furnish specific information, stipulating possible sources where information could be found (e.g. files, computer disks/network/diskettes, reports, minutes, etc.), methods of processing the information (e.g. typewriter, computer, writing) and possible utilization of the information. |

| 135 | 4. Copying and duplicating |

| 4.1 | Compare the concepts copying and duplicating and explain the concept of collating. |

| 4.2 | Briefly explain three processes or equipment that can be used for copying and duplicating respectively. |

| 4.3 | Given a case study on copies of a specific document which have to be made for a specific purpose, evaluate the factors which should be considered before deciding which reprographic process to use and recommend, with proper substantiation, the most suitable process or equipment for the specific assignment. |

| 4.4 | Explain and, in a simulated office situation, correctly demonstrate the preparation of documents for copying or duplicating under the following headings:

- Preparing the master
- Formatting the document
- Proofreading
- Planning for a large print job |

| 4.5 | In a simulated office situation or during practical work experience, correctly operate a photocopying machine (positioning the master; checking – the counter, collator, size of print, correct paper feed tray; then make a trial copy – make the necessary adjustments) to perform at least three different functions (e.g. reduction, enlargement, multiple copies, etc.). |
**Documenting and channeling information**

**5.1 Explain the classification of information (confidential, secret, etc.) and the methods and channels used by secretaries/management assistants for the distribution of processed information.**

**DIDACTIC DIRECTIVES:**

1. In order to develop the skills of information management, various information sources will have to be made available to students in the practicum room and/or in the library. Meaningful case studies will have to be prepared in order to give the students full opportunity to apply this learning content in practice.

2. Group work could be utilized for this module. Students could for instance do research and compile a list of suitable conference venues, recommended restaurants, etc.

3. The protocol section of Home Affairs/Foreign Affairs could be approached for the latest in protocol rules.

4. No special training is required to operate a photocopying machine. A good demonstration and guidance is all that will be required.

5. Students must be introduced to intelligent copiers (copiers networked to computers or phototypesetting equipment) for background information and, as these copiers are more widely used in business, also be able to explain their working and to operate them.

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### Module 7: Preparing, Collecting, Processing and Filing Documents

<table>
<thead>
<tr>
<th>Page in SB</th>
<th>Learning Content</th>
<th>Learning Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>141</td>
<td>1. Filing and indexing systems</td>
<td><strong>On completion of this module the student must be able to:</strong></td>
</tr>
</tbody>
</table>

1. Briefly explain the steps of the records cycle under the following headings:
   - Record creation
   - Instituting security measures
   - Record utilisation
   - Storage and retention
   - Transfer of records
   - Disposal of records

2. Elucidate on the aim of a filing and indexing system.

3. Briefly explain the following filing and indexing systems:
   - Horizontal
   - Vertical
   - Lateral
   - Strategic (placement)
   - Tubular
   - Micrographics (including computerisation thereof)
   - Mechanised and automated systems
   - Centralised and decentralised filing
   - Computerised or electronic systems (including the indexing thereof)

---

| 146       | 2. Classification of files:  
|           |   - Personal  
|           |   - Subject  
<p>|           |   - Geographical | <strong>2.1 Explain and correctly demonstrate in a simulated office situation the personal, subject and geographical classification of files after studying this theme of the learning contents, and after observing a practical demonstration, visiting a business concern or viewing a video.</strong> |</p>
<table>
<thead>
<tr>
<th>Page</th>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>146</td>
<td>3.1</td>
<td>Explain and, where applicable, correctly demonstrate in a simulated office situation the alphabetical, numerical, alpha-numerical and colour coded arrangement of files and the accompanying index system as well as the rules for the alphabetical arrangement of names, surnames, etc. after studying the appropriate learning contents and after observing a practical demonstration, visiting a business concern or viewing a video.</td>
</tr>
<tr>
<td>148</td>
<td>4.1</td>
<td>Explain at least five requirements of a good filing system and justify why an effective filing system is important to a business concern.</td>
</tr>
<tr>
<td>149</td>
<td>5.1</td>
<td>After observing a demonstration or viewing a video, identify by naming each piece of equipment, listing the main features and, in a practical or simulated office situation, correctly use the relevant filing and indexing equipment.</td>
</tr>
</tbody>
</table>
| 149 | 5.2 | Briefly explain the main features of the following filing and indexing equipment and supplies:  
- Vertical filing cabinets  
- Lateral filing cabinets  
- Horizontal filing cabinets  
- Open-shelves  
- Motorized equipment  
- Mobile files  
- Visible files  
- Folders  
- Guide cards  
- Sorting aids  
- Labels  
- Magnetic media  
- Micrographics, microforms (microfilm, microcard, microfiche, ultralife, aperture card, micrographic jacket, holofiche) |
| 153 | 6.1 | Explain, and in a simulated office situation correctly demonstrate the short-term and long-term filing procedure of documents (including sets of documents such as invoices) under the following headings:  
- Collect documents to be filed  
- Inspecting documents for release mark (plus preparing documents for filing)  
- Reading and indexing (mental process)  
- Coding  
- Cross-referencing  
- Sorting  
- Preparing new folders  
- Storing or filing (techniques for putting away documents)  
- Retrieving and charge-out methods  
- Transferring  
- Disposing  

6.2 Briefly explain at least three causes of misfiling and at least six steps to be taken to locate misfiled records. |
DIDACTIC DIRECTIVES:
1. The theory which underpins these skills should be emphasized because of its importance. The learning contents should mainly be presented practically and practice enrichment is therefore very important. The use of appropriate videos is strongly recommended.
2. It is important that all the necessary filing equipment should be provided in the practicum room and that relevant contents are prepared/provided in the filing and indexing cabinets according to the different filing systems.
3. Students should get meaningful, intensive practice in the procedures of filing until these skills can be conducted with the greatest measure of confidence and assurance. Marks should be allocated to the students according to the level of competence reached in advanced filing.
4. Students should know the rules for the alphabetical arranging of names, surnames, etc. very well and it is necessary that each student should compile or receive an information brochure which can be used as a manual.
5. An attitude of responsibility, accuracy, certainty and work pride should be nurtured during the teaching and practising of this learning content.
OVERVIEW

At the end of this module, you should be able to:
• Explain the importance of the post of secretary/management assistant.
• Discuss their career opportunities.
• Describe their duties and responsibilities.
• Explain how they should contribute to the corporate image of the business.
• List the personal traits required of a secretary/management assistant.
• Explain interpersonal skills and human relations in the office.
• Discuss the career advancement of a secretary/management assistant.

UNIT 1.1: THE SECRETARIAL CAREER

The secretary is still an essential person in a business although their role is changing as a result of new technology in word processing and computerised filing. The secretary’s main tasks are to ensure efficient communication and to provide effective administrative services.
The importance of the post of secretary/management assistant

Office workers (including secretaries/management assistants) are found in support roles within all departments of a business. The range of office duties is large and often the content of what appears to be a similar job can vary considerably from business to business.

The secretary/management assistant plays a vital role in the following fields:
- Clerical work. This refers to a role that is mainly at entry level. As a first job, the person answers the phone and does typing, data capturing, word processing, filing and other basic functions which need supervision, e.g. a typist.
- Administrative work. This is at a more senior level where the person may have his/her own area of supervision to ensure a task gets done, e.g. administrative assistant, personal assistant or secretary. They are also responsible for filing papers, scheduling appointments, answering telephones and handling emails and messages on behalf of their employers.
- Managerial work. This level involves undertaking activities to improve the efficiency and effectiveness of the other office responsibilities, e.g. executive and departmental secretaries.

Factors that can influence the remuneration of the secretary/management assistant

Secretaries/management assistants receive different salaries because Government has not yet decided on a minimum salary for them. The following factors play a role in their remuneration:
- The size of the business. Larger businesses usually pay better than smaller businesses.
- The location of the business – urban versus rural. Traditionally people in cities or bigger towns get paid better salaries than people in rural areas.
- The type of work. In the same business, Level 1 secretaries will earn less than Level 2 secretaries and Level 3 secretaries will earn more than Level 2. More responsibilities imply greater accountability (where you have to answer for your actions and take responsibility for the results) which justifies a bigger salary.
- Qualifications. A secretary with a Secretarial Diploma can earn more than a secretary with Grade 12.
- Previous experience, knowledge and skills. Secretaries with more experience and skills can be appointed at a higher job level, which usually comes with a higher salary.
- The remuneration recommended by professional secretary associations can also serve as a guideline for employers.

Remuneration: payment or salary. Accountability: where you have to answer for your actions and take responsibility for the results.

Job titles used for secretarial posts

A job title is a descriptive term used to classify the position of an office worker in a business. Job titles may vary greatly from business to business. The title provides you with an idea of what the position entails. It can also give you a clue about the relation of the position to other jobs in the business. For example, if a job title has the word
‘senior’ or ‘executive’ in it, you can expect it to involve heading up a group of people or a specific department. On the other hand, a position with the word ‘assistant’ or ‘junior’ as its last part may refer to a job suitable for a beginner. The list below shows some of the job titles that fall under the category ‘secretarial’:

<table>
<thead>
<tr>
<th>Administrative assistant</th>
<th>Administrative clerk</th>
<th>Audio typist</th>
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</thead>
<tbody>
<tr>
<td>Data entry clerk</td>
<td>Office supervisor</td>
<td>Executive secretary</td>
</tr>
<tr>
<td>Data processing clerk</td>
<td>Filing clerk</td>
<td>Executive assistant</td>
</tr>
<tr>
<td>Junior secretary</td>
<td>Girl Friday</td>
<td>Management assistant</td>
</tr>
<tr>
<td>Legal secretary</td>
<td>Medical secretary</td>
<td>Receptionist</td>
</tr>
<tr>
<td>Secretarial assistant</td>
<td>Word processing assistant</td>
<td>Switchboard operators</td>
</tr>
<tr>
<td>Typist</td>
<td>Senior secretary</td>
<td>Personal assistant</td>
</tr>
</tbody>
</table>

**Activity 1.1**

1. Collect six different classified advertisements for secretarial jobs.
2. Use a table to compare these jobs.

<table>
<thead>
<tr>
<th>Job title</th>
<th>Name of business</th>
<th>Requirements/skills needed</th>
<th>Experience required</th>
<th>Salary per month</th>
<th>I will be qualified for this job Yes or No</th>
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3. Keep these advertisements in a safe place (for use in other activities).

Peer assessment and group activity.

**Job descriptions for secretary/management assistant posts**

The job description spells out:
- What the worker does.
- How he/she does it.
- Under what circumstances the task is carried out.

As an executive secretary you will have the responsibility of drawing up a job description for every post in your department. You need a job description before you can start recruiting new employees. The job description helps the employee to know exactly what is expected of him/her.

A job description should include the following information:
- Job title.
- Job summary – a list of the important duties or functions of a specific job.
• The responsibilities and duties in detail.
• The employee’s powers of authority – who he/she has to report to, decision-making powers, budgets.
• How the job relates to other jobs in the business.
• The machines, tools and materials the employee will use.
• The working conditions, such as hours per day.

Activity 1.2 Pairs

Read the following statement:
‘Businesses should have detailed job descriptions available for all employees.’

Do you agree or disagree? Motivate your answer to your partner’s then listen to their opinions. Report back to class. Group assessment.

Levels of secretary/management assistant posts

Lower level (entry level)
Persons with Grade 12 or equivalent Level 4 education, who have basic office skills, might qualify for entry-level secretarial positions. However, employers increasingly require secretaries to have extensive knowledge of software applications such as word processing, spreadsheets and database management, as well as telephone skills. Secretaries/management assistants generally advance by being promoted to other administrative positions with more responsibilities.

Examples: Receptionists, typists, audio typists, switchboard operators.

Middle level
Secretaries/management assistants should be proficient in using a keyboard and good at spelling, punctuation, grammar and oral communication. Employers also look for good customer service and interpersonal skills because secretaries/management assistants must be tactful in their dealings with people.

Qualified office staff who broaden their knowledge of a business’s operations, and improve their skills, may be promoted to senior or executive secretary/management assistant, clerical supervisor or office manager. Secretaries with appropriate qualities can advance to become trainers, supervisors or managers within their own businesses.

Examples: Junior secretaries, Girl Friday.

Higher level (top level)
Discretion, good judgement, organisational or management ability, initiative and the ability to work independently are especially important for higher level secretary/management assistant posts.

Examples: Senior secretaries, executive secretaries, personal assistants and professional secretaries.

Activity 1.3 Individual

Copy and complete the following diagram which illustrates the different levels of secretarial posts.

_____ level, examples: _____

_____ level, examples: _____

_____ level, examples: _____

Assess according to answers in teacher’s guide.
An example of a job description for the lower level secretary/management assistant post:

**Henry’s Hardware Store**

**Job description**

*Position:* Receptionist

*Responsible to:* Office supervisor

*Duties:* • Welcoming and attending to customers  
• Making appointments  
• Receiving and dispatching post  
• Answering the phone and answering queries  
• Photocopying and printing  
• Supervising junior receptionist

**Qualifications**
The junior secretary in our organisation must have strong written and oral communication skills, as well as a strong background in typing. Knowledge of MS Office programs including Microsoft Word, Excel and PowerPoint is important. He or she must be familiar with various telephone systems. Candidates must also work well under pressure, multitask with efficiency and feel comfortable making phone calls. The junior secretary candidate may be required to have knowledge of a specific area of the business or of a specific computer program, but training will be provided in these areas. The minimum qualification required is a high school education or equivalent, as well as previous or related experience.

**Training**
Despite having the right qualifications, the candidate might need additional training in company policies and procedures. This training is conducted by a senior secretary and training material such as handbooks or guides will be provided.

**Room for growth**
The junior secretary position allows the individual to demonstrate his/her abilities, become familiar with various facets of the company/business and form relationships with professionals in various departments. The junior secretary can be promoted to another position that allows for greater opportunity and better remuneration within the company.

**Salary information**
Compensation is based on experience and qualifications.

Compiled on: 25 June 2012.  
Compiled by: M du Plessis (Human Resource Manager)

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**EXAMPLE**

An example of a job description for the middle level secretary:

**Brickpave International**

**Job description**

**Junior secretary**

**Overall responsibilities**
Provide support to everyone in the office. Report to or take instructions from a senior secretary. Ensure that office procedures run smoothly.

**Specific responsibilities**
• Support the senior secretary in her or his duties and carry out tasks delegated to you by the senior secretary.
Memorandum: note to communicate information to office staff, and often shortened to memos.

EXAMPLE

An example of a job description for the higher level secretary:

Lightfoot Wineries
Job description

Senior Administrative Secretary

Overall responsibilities
The Senior Administrative Secretary is responsible for contributing to the effective operation of the office. This includes supporting the business development and project needs by consulting other staff. The Senior Administrative Secretary position is an integral component of the administrative team, which also includes an Executive Assistant and an Office Manager.

Specific responsibilities
1. Reception
   - Answer phones, take messages, direct calls, use voice mail technology.
   - Distribute incoming mail, handle outgoing mail, prepare for courier services.
   - Manage visitors’ sign-in as well as security system (training will be provided).
   - Maintain orderly appearance of reception area and boardroom.
   - Order replacement supplies for office.

2. Administration
   - Word processing (MS Word, Excel, PowerPoint, Access).
   - Preparation of proposals, reports and training material (photocopying, arranging for printing, etc.) according to specified requirements.
   - Assist Office Manager with basic bookkeeping: bank deposits and management of petty cash.
   - Make travel arrangements.
   - Manage contacts directory in MS Outlook.
   - Manage subscriptions to magazines.
   - Manage internal lists (phone cards, distribution list, birthdays, etc.).

3. Workshops/planning
   - Schedule meetings and interviews with clients and other external parties.
   - Assist with the planning of workshops, and in the preparation of manuals, reports and reference material.
   - Manage hotel bookings (meeting rooms, menus, audio visual equipment, accommodation).
   - Arrange travel reservations; meeting material; registration of attendees.

4. Contribute to the successful operation of the business through:
   - Adherence to business policies and procedures.
   - Participation in social and sustainability committees.

5. Skills and attributes
Specific skills and attributes required to successfully fulfil these responsibilities include:
   - Directly relevant education plus a minimum of five years of directly relevant experience.
   - Strong computer skills:
     - Be able to use Word, Excel, PowerPoint, Outlook, Access.
     - Place web-based orders with suppliers.
Activity 1.6 Pair work

1. Collect an advertisement for a higher level secretary/management assistant post.
2. Identify the respective information given relating to the job description for that specific post.
3. Draw up a job description for the relevant position.

The specialist fields of secretarial work

Some secretaries/management assistants prefer working in a specialist field rather than in a general office. Examples include working in a lawyer’s office; in a doctor’s surgery; in an office of an academic institution; in an estate agency’s office; or in a school office. Extra courses and/or in-service training are recommended before applying for a ‘specialist’ secretarial job as explained below.

Legal secretary

The legal secretary works closely with the lawyer.
Legal secretaries are also known as litigation secretaries or legal administrators. They are secretaries who work in law firms or in the legal department of bigger businesses, assisting lawyers. They help by preparing and filing legal documents, such as documents for the transfer of property, mortgage bonds, cases and appeals.

Legal secretaries assist lawyers by giving them administrative support. They form a vital part of any legal team of professionals who work together. The work of a legal secretary varies and can be very interesting. They generally perform many of the administrative tasks expected of all secretaries like answering the phone, filing and typing, but they also spend a lot of their time typing legal documents and contacting clients on behalf of lawyers and legal executives. They keep in touch with clients to provide them with updates on how their cases are progressing and they may also have to accompany lawyers to court or police stations.

Proven secretarial skills including proficiency in audio and copy typing, whether through experience or secretarial qualifications, will impress potential employers.

Legal secretaries should have technical, human and conceptual (thinking) skills:

- Technical skills.
  - The ability to understand clients and to make a favourable impression on clients.
  - The ability to get on well with other colleagues.

- Conceptual skills.
  - The ability to cope with several tasks at once and pay attention to subtle details while remaining calm.
  - The ability to adapt to changes in the business.

People can acquire the legal skills they need through Further Education and Training colleges, private colleges or some law firms who are willing to train people themselves.

The skill to work efficiently and accurately, because errors in legal documents (like incorrect identification numbers or amounts) can have huge repercussions or consequences for the firm.

- Human skills.
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Medical secretaries may work at a hospital; for a doctor in a private practice; or for a state health department. Although each position may require specific medical knowledge, the general areas a medical secretary should be proficient in are medical communication and new office technologies that apply to those in the health field.

In a medical environment, it is essential for a medical secretary to have a working knowledge of medical terminology in order to understand and properly communicate this type of vital information.

They must also understand medical procedures, insurance billing practices, and laboratory procedures and tests. Health information is private and it is important that a medical secretary knows when information is sensitive. This ensures that patients are not embarrassed or uncomfortable in the presence of other patients.

The technical aspects the medical secretary may include transcribing medical records (writing or typing out a copy in full); applying insurance codes in computerised billing systems; and managing a patient appointment scheduling system.

**Transcribe:** write or type out a copy in full.

**Academic secretary**

The academic secretary is responsible for overseeing the management of academic administration in a school, college or university. They support and advise the principal of the school, or the academic head of a college or university, in developing academic policies, strategic planning and academic governance (to make sure that the policies and regulations of the institution are carried out).

They should have a thorough knowledge of academic terms used in academic policies, procedures and research. They need to stay up to date with respect to academic trends and the history of the institutions where they are employed.

Academic secretaries should enjoy an academic environment where interaction with many people takes place and where they need to support students in reaching their educational goals. They should exercise patience and tolerance of diverse cultural backgrounds and lifestyles of students.

**Governance:** carry out the policies and regulations of the institution.

**Real estate secretary**

A real estate secretary works closely with estate agents.

Real estate secretaries work in law firms and in real estate (dealing with buying and selling property including the land and the buildings on it). They provide administrative support to estate agents and attorneys by performing duties such as: processing expense reports; coordinating travel itineraries (the details of a trip such as dates and times and places to stay or visit); arranging meetings; tracking invoices; and preparing, drawing up and editing various real estate documents like purchase-and-sale contracts, leases and sales documents.
Real estate secretaries also represent agents and attorneys when communicating with clients. They need to screen telephone calls and direct client queries to the correct parties.

Skills required for a real estate secretary include:
- An eye for detail.
- The ability to organise meetings with attorneys and clients.
- The ability to communicate well (verbally and non-verbally) and build sound client relationships.
- Accurate computer skills (word processing).
- Telephone skills.
- Professionalism – keeping the attorney/client/agent information confidential.
- The sense to know when to act and when to refer matters to agent/attorney.
- The ability to multitask and meet deadlines.

**Itinerary:** the details of a trip such as dates and times and places to stay or visit.

**Real estate:** property including the land and the buildings on it.

**School secretary**

A school secretary works closely with teachers, parents and students.

The school secretary is employed to carry out the clerical and secretarial work of a specific school, under the supervision of the principal. They provide great assistance to the principal, teachers, learners, parents and the community. Their work may include:
- Receiving and making phone calls.
- Contacting parents when necessary.
- Attending to visitors and answering their questions or directing them to someone who can help them.
- Recording the information of incoming learners.
- Preparing and sending out records of transferred learners.
- Typing class lists and monthly, quarterly or annual newsletters and reports.
- Maintaining the principal’s diary and calendar.
- Assisting the principal in preparing statistical reports.
- Filing claim forms when a learner reports an accident.
- Ordering textbooks, supplies and whatever else is necessary for the running of the school.

Skills required:
- Fluency in two or more of the official South African languages.
- The ability to write routine letters, spell correctly and use proper punctuation and grammar.
- A pleasant and courteous telephone manner.
- Fast and accurate word processing skills.
- The ability to operate the various kinds of office machinery needed for the job.
- Familiarity with school policies and educational structures.
- Punctuality and trustworthiness.
- Good communication skills – pleasant and relaxed when working with children, parents and teachers.
- Good judgment and emotional stability when dealing with emergencies.
Activity 1.7

1. Collect two different advertisements for ‘specialist’ secretary/management assistant posts.
2. Identify the duties and responsibilities of each post that make it a ‘specialist’ post.
3. Compare these two advertisements, and name the differences.

The effect of the information era on the status of the secretarial career

The information era (our particular period of time in history), also commonly known as the computer era, has given us the ability to transfer information freely and have instant access to information that would have been difficult or impossible to find previously.

Office work has always consisted of receiving, sorting, storing and passing on information. Recently, with electronic aids, the focus has shifted from simply handling information to manipulating and processing information to make it more useful. Information is now easier and quicker to access as well as more accurate than before.

The information era offers new specialist fields for secretaries. Secretaries now need to be trained, and qualified, to use technological aids such as computers (using Internet, e-mail and software programs), copying and photocopying machines, fax machines, video conferencing, etc.

The effect of technological aids on the performance of a secretary/management assistant

The secretary/management assistant should, as far as is required by the firm she or he works for, keep up with new technological developments and equipment in the office. The main reason for keeping up is to:

- Increase the productivity and effectiveness of the business.
- Handle activities quicker.
- Handle activities more accurately.
- Ensure quicker and more effective communication.
- Store information safely.

The secretary/management assistant can no longer have the excuse of not being able to manage new machines or new computer programs. Training is always available although it is sometimes costly.

Resources which secretaries/management assistants can use to broaden their knowledge and skills include:

- The Internet.
- Professional magazines, e.g. EXECUTIVE PA.
- Newspapers.
- Academic text books, e.g. Administrative Management (E Ferreira, A Erasmus, D Groenewald); Fundamentals of Office Management (E Ferreira, A de Beer, A Erasmus, D Groenewald).
- Workshops for secretaries. Visit the following websites for more information:
  - www.companysecretaries.co.za.
  - www.skillsportal.co.za.
• Secretarial, office and administration professional bodies.
• Exhibitions.

The promotion route of a management assistant from the post of junior secretary through to personal assistant

The diagram below shows the promotion route of a management assistant from the entry-level post of junior secretary up to the more senior personal assistant.

**UNIT 1.2: CAREER OPPORTUNITIES**

**Employment sectors, both private and public, where secretaries/management assistants could find employment**

Job opportunities for secretaries or management assistants are available in the following sectors:

**Private sector**

- Manufacturing and processing businesses, e.g. factories (food, clothing, furniture).
- Mining industries.
- Agricultural businesses, e.g. forestry, fishing, industry, farming.
- Wholesalers.
- Retailers.
- Service businesses, e.g. lawyers, accountants, banks, medical practitioners, insurance brokers.
- Hospitality, e.g. accommodation (hotels), bus companies, entertainment businesses.
- Construction companies.

**Public sector**

- National Government departments, e.g.:
  - Transport (stations, airports, harbours)
  - Health (hospitals, clinics)
  - Education (schools, colleges, universities)
  - Welfare
  - Labour
- Provincial Government departments
  - Roads
  - Traffic Department
- Local Government
  - Municipality

**Examples:**

- National Government departments, e.g.:
  - Transport (stations, airports, harbours)
  - Health (hospitals, clinics)
  - Education (schools, colleges, universities)
  - Welfare
  - Labour
- Provincial Government departments
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  - Traffic Department
- Local Government
  - Municipality

**A list of sources of available posts in the secretarial field**

- Several websites are available when looking for a secretarial job, e.g:
  - [www.getthejob.co.za](http://www.getthejob.co.za).
  - [www.jobmail.co.za](http://www.jobmail.co.za).
  - [www.careerweb.co.za](http://www.careerweb.co.za).
  - [www.dav.co.za](http://www.dav.co.za).
  - [www.bestjobs.co.za](http://www.bestjobs.co.za).
- Daily newspapers (classifieds), e.g. *Die Burger, Cape Times, The Citizen*.
- Weekly smalls: *Jobmail.*
- Sunday newspapers, e.g. Rapport, Sunday Times.
- Employment agencies, personnel consultants and recruitment agencies.
- Newsletters sent by professional associations.
- Noticeboards at businesses or in shopping malls.
- Government Gazettes.
- Professional magazines, e.g. De Rebus (a magazine for lawyers), South African Medical Journal (for medical practitioners).
- Bulletin boards in a business for internal vacancies.

Activity 1.8

Use the Yellow Pages, telephone directory, newspapers (classifieds) and the Internet to identify ten employment agencies in South Africa where secretaries can look for jobs.

UNIT 1.3: THE ROLE OF THE SECRETARY/ MANAGEMENT ASSISTANT

As mentioned in the beginning of the module, the main task of the secretary/management assistant is efficient communication and effective administrative services in her or his office. These activities go with certain responsibilities towards management, colleagues and customers. We will now discuss these roles in detail.

Responsibilities towards management

Prioritise the manager
- When management wants you to do something, it should be your priority to attend to it immediately.
- Respond quickly, and with undivided attention, when the manager wants you to bring files, phone someone or complete a document.
- If you are busy with something else, try to put it on hold, and attend to the task that the manager requested.
- Support the manager and stay loyal to him/her in order to boost his/her image as head of the department or business.
- Lighten the workload of the manager by being his/her memory – use a diary to make sure that he/she never forgets important information.
- Design a follow-up (reminder) system to ensure that certain matters and jobs are dealt with at the correct time.
- Inform the manager of any cultural preferences of visitors/customers, e.g. vegetarians, halaal, etc.

Provide administrative support
- Transcribe (type back) information dictated by the manager within the required time.
- Make appointments and travelling arrangements, and arrange meetings for the manager – then see to all the requirements for such meetings.
- Represent the manager when he/she is away from the office and deal efficiently with routine situations during the manager’s absence; refer emergencies to his/her deputy.
• Attend to the manager’s incoming and outgoing mail.
• Ensure that the manager’s office, and your own, is in good order, i.e. clean, well organised and tidy.
• Receive visitors, difficult customers, representatives, etc. at the business.
• Know how and where to contact the manager at any time.
• Protect the manager from unpleasant visitors/callers, and inconvenient interruptions.
• Keep all confidential business with which you become acquainted in the course of your work to yourself.
• Assist the manager when his/her social and business activities coincide.

**Store and retrieve information**
• File and index confidential documents pertaining to the manager’s duties.
• Retrieve filed documents at any time without delay when the manager needs them.
• Keep up dated information on telephone numbers, dates for meetings and details of employees easily available.
• Store all files and documents in a safe place at the end of the day.

**Record information**
• Type routine letters and memos when the manager asks you to.
• Record information accurately and legibly (people must be able to read it easily), whether by hand or by using a computer or a dictaphone, e.g. minutes of meetings, instructions given by management or important institutions.
• Control the office supplies store (know when to order what products/items such as stationery, refreshments, stamps, etc.), and recommend the purchase of stock or equipment when required.
• Write down telephone messages and make sure that they are delivered to the manager or right person.

*It is vital that a secretary records all telephone messages accurately.*

**Handle money**
• Manage the petty cash because there is often a need for small amounts of petty cash to buy stamps, casual staff wages, refreshments, postage on parcels, small donations, etc. in the manager’s office.
• Keep a record of petty cash vouchers and money received from the accountant as imprest (money in advance).
• Buy office supplies when required, or pay for maintenance of equipment (make sure that you get a receipt for all payments).
A secretary is responsible for making sure that the office has its required supplies, such as stationery.

**Imprest**: money in advance.

### Responsibilities towards customers of the business

**Process information and make calculations**
- Much of the information dealt with in offices comes in the form of figures, and the secretary/management assistant may find that the figures on an account have to be adjusted (added, subtracted, or perhaps by adding VAT). You should do the corrections and inform management of the changes.
- You must also contact suppliers if you have received an incorrect invoice, receipt or statement, and make sure that the errors are adjusted.

**Listen to customers’ complaints**
- Pay attention to existing customers and make them feel important.
- Always stay calm and be polite to customers – never lose your temper or ignore a customer.
- Write down the details of complaints and give them your immediate attention if possible.
- Bring loyal customers to the attention of management.
- Try to avoid bad service delivery to customers.

### Pass on information
- Information kept in the office often needs to be communicated to customers. Sometimes this is done by means of the spoken word, either face-to-face or over the telephone. Sometimes it is done in writing (e-mails or inter-office memos).
- When you send letters, forms and reports to people outside the business (customers), make sure they are accurate and neat whether they are sent by mail or e-mail; if they are printed, use good quality paper.
- You will also receive letters and other forms of communication from customers and need to attend to them as quickly as possible.

### Your responsibilities towards other staff/colleagues
- Give on-the-job training to subordinate staff (staff at a lower level than you).
- Recommend development and/or training if you see a colleague needs it.
- Try to be a positive link between management and other staff – sympathy with colleagues will make them feel ‘at home’.
- Avoid relationships with colleagues (they might ask for personal favours).
- Ensure that work is done to meet predetermined deadlines (time schedules) and standards and that no delays occur due to sickness, annual holidays, etc.
- Report backlogs of work, serious
work problems, staffing difficulties, unsatisfactory equipment, etc. so that the problems can be solved.

- Show interest in your colleagues but stay away from office gossips.
- Treat other staff with integrity – be loyal and if you make a promise, keep it.
- Be trustworthy (dependable) – colleagues should know that they can trust you.

**Deadlines:** time schedules.  
**Integrity:** being loyal and keeping promises.  
**Subordinate:** at a lower level than you.

### Differences between the duties and responsibilities of a secretary/management assistant

<table>
<thead>
<tr>
<th>Duties</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duty is a moral commitment to someone e.g. being loyal to management.</td>
<td>The secretary is responsible for the entire task and its outcome, e.g. administration in the office.</td>
</tr>
<tr>
<td>It denotes a feeling of doing the ‘right thing’ without self-interest.</td>
<td>It is a set of instructions that one has to follow, e.g. typing and filing of important documents.</td>
</tr>
<tr>
<td>Duty has to do with someone’s character and value system, e.g. it is your duty to adhere to the policies of the business.</td>
<td>Taking responsibility means taking ownership of the entire task, and completing it successfully.</td>
</tr>
<tr>
<td></td>
<td>It means you are able to work without supervision.</td>
</tr>
</tbody>
</table>

### UNIT 1.4: IMAGE AND GROOMING

The image of the secretary/management assistant should be elegant, friendly and professional. The way they dress, walk, talk and groom themselves, reflects their personality. The more professional they appear, the more they will contribute to the image of the business.

#### Corporate image

The corporate image of a business is the perception that the general public holds about a particular business, and what it stands for, what it says and what it looks like. The corporate image of the business should be appealing to the public.

Many companies invest a great deal of time and money in an effort to influence the opinion that consumers hold about the products and/or services the business offers, as well as the business itself. This process of creating positive public relations (which is the management of the flow of information from the business to the public) involves interaction with:

- Consumers.
- The media.
- Labour unions.
- Industrial associations.
- Other entities (financial institutions, political parties, charity organisations, religious institutions) that have a direct and indirect impact on public opinion.

It is important to establish and maintain a positive relationship with the general public. This begins by answering the phone in a friendly manner, and by attending to customers as quickly as possible. It is also important to offer services and products that meet the requirements of customers and in this way earn their goodwill (so that the public trusts you and likes to do business with you). This positive experience may be spread by word-of-mouth and
helps to introduce other consumers to the products/services offered by the business. It also makes it easier to establish a favourable corporate image in the minds of more people.

**Corporate image:** the perception that the general public holds about a particular business, and what it stands for, what it says and what it looks like. **Goodwill:** when the public trusts a company and likes to do business with it. **Public relations:** the management of the flow of information from the business to the public.

**General factors that may contribute to the corporate image of the business**

- Website: Display enough detail to promote the business and its products or services.
- Logo (brand name): Decide on a logo that is easy to understand and easy to remember and matches the products/services of the business.
- Stationery: Business letters, letterheads, business envelopes, correspondence and employee identity cards (magnetic cards) can make a huge impact on readers or viewers. Neatness of documents is important. Business cards should look smart and be informative since they can be used as a means to spread information about the business and to secure future business prospects.
- Printed advertisements: Flyers, brochures, billboards, etc. represent a sample of your business, and should reflect the image and uniqueness of your business in a professional manner.

Logos and letterheads form part of an organisation’s branding strategy.

**The effect of a secretary/management assistant’s appearance, image, grooming and efficiency on the corporate image of a business**

How the secretary/management assistant handles the following factors may contribute to the corporate image of the business:

**Appearance and grooming**

- Well-dressed and friendly secretaries are an important asset for the business. Never overdo your make-up, your hair or the way you dress.
- Plan your wardrobe and accessories carefully. A fresh appearance increases the impression you make on other people.

Not all make-up styles are suitable for the office environment.