NATED Series

Office Practice N5

Student’s Book

L. Noeth, C. Esterhuyse
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<td><strong>Module 1: Organisational Structure and Office Layout</strong></td>
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</table>
| 1         | 1. The organisational structure          | 1.1 Name the departments in a medium to large sized business undertaking and briefly explain the functions of each department, their influence on each other and their contribution to the organization as a whole (with emphasis on teamwork and cooperation).  
1.2 Draw an organizational diagram showing the departments and posts (on different post levels) and briefly explain the line and staff functions, clearly distinguishing between the horizontal and vertical functions in the hierarchy of posts. |
| 9         | 2. Organisational structure and the secretary/management assistant | 2.1 Explain why it is important for a secretary/management assistant to have a good knowledge of the departments, their functions and the contact persons in these departments  
2.2 Explain the procedure a secretary/management assistant has to follow in dealing with the referral of enquiries or problems of customers.  
2.3 Explain the flow of documents, memoranda and circulars from the secretary’s/management assistant’s desk, indicating the departments/sections involved, under the following headings:  
   • Flow of documents in the traditional office: input (dictation); processing (typing); verification and signing; output (copying, mailing); storing (filing)  
   • Flow of documents in the modern / electronic office: input (dictation, electronic media); processing (computer); verification and signing; output (electronic printer, electronic mail, fax); storing (electronic storage on diskette, hard disk, network, micrographics)  
   • Flow of internal documents: memoranda, agendas, information documents, electronic mail  
2.4 Briefly explain the secretary’s/management assistant’s role and action to be taken to have the following documents signed before distribution or utilization:  
   • Letters  
   • Circulars  
   • Financial statements  
   • Contracts  
   • Notices of meetings  
2.5 Briefly explain the concepts authority and delegation as well as the levels of decision taking and motivate why this is of importance to a secretary/management assistant in the execution of her duties. |
| 15 | 3. Organisational structure and communication | 3.1 Briefly explain the organizational structure and communication in a business concern under the following headings:  
- Vertical communication  
  - Downward communication – instructions  
  - Upward communication – feedback (reports, information, inputs)  
- Lateral communication  
- Diagonal communication  
3.2 Explain how a secretary/management assistant will use her knowledge of the organizational structures and sources of information when data and/or useful or relevant information has to be gathered, arranged and distributed amongst departments (e.g. budgets, personnel, minutes, reports, etc.) |
| 18 | 4. The office environment | 4.1 Make a list of the work areas and meeting facilities available to administrative staff, including secretaries/management assistants, in a medium to large business organization.  
4.2 Give a detailed explanation of the concept ideal office environment and fully explain the ideal conditions regarding light, air, temperature, colour and noise in an office. |
| 21 | 5. Office layout | 5.1 Compare the different types of offices in a large business organization pertaining to their nature, utilisation, layout, advantages (minimum of 3) and disadvantages (minimum of 2). |
| 25 | 6. Ergonomics and office furniture | 6.1 Briefly explain the principles of creating a safe and comfortable working environment  
6.2 Explain the concept ergonomics and elucidate on the contribution of ergonomics to productivity in the office.  
6.3 Give a detailed explanation of the requirements for effective office furniture for the secretary’s / management assistant’s office as well as of a good sitting posture. |

**DIDACTIC DIRECTIVES**

1. Lecturers must assist students to gain a holistic view of the entire organization and stress the importance of teamwork and especially the participative role of the secretary/management assistant.  
2. Select organizational diagrams which represent the full hierarchy of posts, including the post of secretary/management assistant, in order to give to students the full picture of departments, functions and posts. Lecturers from the management programmes may be of assistance.  
3. Practical experience in the gathering, arranging and distribution of data could be done by means of a case study or in-basket assignment where information from different departments (e.g. minutes, financial reports and budgets) could be furnished to students with the instruction to extract or summarise the required information from these sources and to compile the necessary report or information sheet.  
4. Visits to administrative offices (including those of the educational institution) could be used as models for observation by students. Suggestions pertaining to the proper layout and appearance of an office and ideal working conditions could form part of a group assignment.  
5. Brochures from and visits to suppliers of office furniture could be used as part of an assignment on the requirements of the different types of furniture used in an office.  
6. The proper sitting posture must be demonstrated to and exercised by students to become a working habit and contribute to efficiency and productivity.
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| 33         | 1. The secretary’s/management assistant’s office     | 1.1 Give a brief description of the ideal location of the secretary’s/management assistant’s office, its décor and general appearance.  
1.2 After having observed at least two different locations of the secretary’s/management assistant’s office in business undertakings or after having viewed a video on the same, critically evaluate each location against the requirements of an ideal location for an office.  
1.3 After having observed the layout of the secretary’s/management assistant’s office in at least two business undertakings or after having viewed a video on the same, draw the ideal office layout/design for a secretary/management assistant and explain workstation management under the following headings:  
   • Desk-top display  
   • Choice of tools and aids  
   • Choice of equipment and technology  
   • Choice of furniture  
   • Space utilization for effectiveness  
   • Organisation of resources  
1.4 Compile guidelines for secretaries/management assistants on  
   • Workstation efficiency and security;  
   • The effect of static on electronic equipment;  
   • Computer placement and usage which would eliminate/minimise stress and fatigue; and  
   • How to cope with the effect of static electricity on electronic equipment. |
| 34         | 2. Managerial functions in the secretary’s/management assistant’s office | 2.1 Enumerate the functions of management and the purpose of each such function.  
2.2 Explain the managerial functions in the secretary’s/management assistant’s office under the following headings:  
   • Planning (short-term own planning dovetailed with manager’s planning; medium to long-term own planning to best achieve objectives of management)  
   • Organisation (decision-making regarding all resources to be utilised for the execution of instructions/delegated instructions; to coordinate the activities of the manager’s planning)  
   • Activating (command over activities, command over junior staff, activating junior secretaries and typists/computer operators, decision-making, ensuring that instructions / assignments are carried out, initiating and perpetuating activities, supervision, motivation) |
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| 39   | 3. Self-management | 3.1 Explain self-management by a secretary/management assistant under the following headings:  
- Setting of own objectives  
- Planning (medium to short-term planning)  
- Plans of action  
  - To decide how to do the work in the most effective manner  
  - To distinguish between the importance of tasks and to complete them in that order  
- Follow-up, evaluation and control  
3.2 Explain office house-keeping by a secretary/management assistant with special reference to safety, security, neatness, documents, mail, filing and flow of work. |
| 44   | 4. Time and task management | 4.1 Explain and, where feasible, practically demonstrate in a simulated office situation the following aspects of time and task management:  
- Personal work planning (general guidelines)  
- Planning mechanisms/aids (To do lists, task records, time charts, diary, etc.)  
- Task and time allocation (daily, weekly, monthly planning; planning for major tasks; communicating planning to manager)  
- Setting priorities  
- Identifying work patterns  
- Learning the job (know what a task entails and dovetail with managers’ task)  
- Adopting a flexible plan/program (in the handling of urgent/important matters)  
- Managing details  
- Handling of delegated tasks, follow-up and evaluation  
- Controlling/managing a large project (objectives, due date, segmentation, due dates for segments, check-list)  
- Working on one task at a time  
- Starting the day with a difficult task  
- Grouping similar tasks  
- Planning relaxation into work schedule  
- Doing tasks right the first time  
- Utilising bits and pieces of time (for routine tasks, reading, formulating ideas for ensuing task, etc.)  
- Preparing in advance  
- Completion of a task  
- Coping with interruptions (guidelines to deal with interruptions)  
- Positioning materials and tools within easy reach |
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<td>55</td>
<td>5.</td>
<td>Diary control</td>
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<td>5.1 Given a case study on diary control, explain and correctly demonstrate in a simulated office situation the following aspects of diary control by a secretary/management assistant:</td>
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<td></td>
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<td>• Handling the dual diary (guidelines)</td>
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<td>• Keeping own diary (enter in pencil, confirmation, write in ink, complete manager’s diary, important information / events, new visitors, communicate changes between manager and secretary / management assistant)</td>
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<td></td>
<td></td>
<td>• Keeping the manager’s diary (guidelines)</td>
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<td></td>
<td>• Scheduling and controlling times of appointments (preparation for next appointment, return after absence from office, special consideration for different types of managers, e.g. attorneys, doctors, etc.)</td>
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<td></td>
<td></td>
<td>• Scheduling creative time for manager</td>
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<td></td>
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<td>• Cancellation of appointments</td>
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<td>59</td>
<td>6.</td>
<td>Follow-up systems, carry-forward systems and procedures for reminders</td>
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<td>6.1 Given a case study on the application of a follow-up system and a filing cabinet with the 43 tickler folders (31 for each day of the month and 12 for each month), correctly demonstrate in a simulated office situation how such a follow-up system works regarding work to be done and information/documents to be dealt with at a later stage.</td>
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<td>6.2 Explain a system for the carrying forward of unfinished work from one day to the next.</td>
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<td>6.3 Briefly explain a system of reminders/follow-up for work delegated by a secretary/management assistant to junior secretaries.</td>
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<td>62</td>
<td>7.</td>
<td>Managing telephone usage</td>
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<td>7.1 Explain the managing of telephone usage by a secretary/management assistant with special reference to the following:</td>
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<td>• Procedure manual for telephone usage</td>
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<td>• Control systems, controlling of telephone expenses and mechanisms to monitor telephone expenses at all extensions</td>
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<td>• Maintenance of the system and breakdowns</td>
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<td>• Training of staff and staff development</td>
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8. Managing mailroom services

8.1 Explain the managing of mailroom services with special reference to the following:
   - Procedure manual for incoming, outgoing and internal mail
   - Control of postage expenses (franking machines and the stamp book)
   - Control of mail and remittance registers
   - Training of staff and staff development

**DIDACTIC DIRECTIVES:**
1. Ample opportunities must be afforded the students to observe offices of secretaries/management assistants, its layout and the requirements for efficiency by means of visits to business undertakings or viewing of videos on this topic. It is recommended that each student make use of a questionnaire or check-list to give substance to the observation.
2. In dealing with the themes of managerial functions in the secretary’s/management assistant’s office, self-management and time and task management it is recommended to approach competent secretaries/executive secretaries/personal assistants in large business undertakings in order to obtain inputs.
3. For the theme on time management, use of videos on this topic is recommended (e.g. “The Time Trap”).
4. In dealing with the themes managing of filing and retrieval systems, managing telephone usage and managing mail-room services, the approach from a management point of view will have to be followed. Inputs from managers and administrative managers should also be obtained. Examples of procedural manuals should also be studied.

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### MODULE 3: DEALING WITH MESSENGERS

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| 75         | 1. Control and monitoring | 1.1 Briefly explain control and monitoring of messengers with special reference to:  
   - Who controls messenger services and what are the duties in that regard  
   - What monitoring actions are implied  
   - Control of delivery books (outward) |
| 78         | 2. Instructions and directions | 2.1 Briefly state the manner in which instructions are given to messengers and elaborate on reliable sources which can be used to give directions to messengers. |
| 80         | 3. Coordination of the function | 3.1 Briefly explain the function of coordination of messenger staff and delivery vehicles. |
| 81         | 4. Organising collection and dispatch | 4.1 Explain the organization of collection and dispatch of documents/articles by messengers under the following headings:  
   - Scheduling of times  
   - Allocation of messenger staff  
   - Coping with emergencies and absenteeism |
<p>| 83         | 5. Security | 5.1 Briefly elaborate on the measures to be taken to ensure the safety and security of documents and articles to be delivered. |
| 84         | 6. Planning the route | 6.1 Briefly explain the planning of routes to be taken by messengers with reference to economy of time and cost-effectiveness and indicate how deviations from planned routes are accommodated. |</p>
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<td>7. External messengers</td>
<td>7.1 Briefly explain how messengers from other organizations are dealt with regarding access control, control of security of documents/articles and acknowledgement of receipt.</td>
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**DIDACTIC DIRECTIVES**

1. Lecturers are advised to consult firms with an organized messenger service with regard to information and policy directives. The information furnished by a speaker from such an undertaking could be most informative.

**MODULE 4: ACCESS CONTROL, SECURITY AND SAFETY**

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| 92        | 1. The business policy                 | 1.1 After having studied the learning content of this module from a textbook and having made enquiries and observed access control, security and safety at business concerns, elucidate on business policy regarding access control, security (of buildings/offices and safeguarding classified/confidential information) and safety.  
1.2 Compile a typical procedural manual on access control, security and safety from examples of manuals obtained from business concerns or else from information obtained from persons in charge of the departments responsible for this function  
1.3 Briefly elucidate on (a) the principles and procedures of combating industrial espionage and (b) security clearance of personnel. |
| 90        | 2. Identification and access cards     | 2.1 Explain identification cards with special reference to:  
• Purpose  
• Prescriptions for use  
• Dealing with outsiders  
• Control inside the building – action to be taken  
2.2 Briefly explain access cards or codes used by employees to gain access to the building or to restricted areas. |
| 99        | 3. Visitors’ register                  | 3.1 Given a case study on visitors’ registers and examples of such registers from business concerns, correctly complete all the particulars required.  
3.2 Briefly explain the duties of the person responsible for the keeping of the visitors’ register as well as the functions of follow-up and control. |
| 103       | 4. Scanning equipment                  | 4.1 Briefly elucidate on the types of scanning equipment used by business concerns for access control, the purpose thereof and the control function involved. |
5. Security with regard to the secretary’s/management assistant’s workstation

5.1 Explain security with regard to the secretary’s / management assistant’s workstation under the following headings:
   - Dealing with confidential information and handling money
   - Placement of sensitive documents on the workstation and dealing with such documents during temporary absence from the workstation
   - Who may handle documents/information
   - Password protection of sensitive work on the computer
   - Safe-keeping of sensitive documents, electronic data and money after hours

6. Safety in the office

6.1 Compile guidelines pertaining to safety in the office for use by office staff under the following headings:
   - Legislation on office safety
   - Unsafe conditions
   - Unsafe actions

6.2 Compile a procedural manual for use by office staff for each of the following:
   - Bomb scare
   - Fire
   - Hostage-keeping
   - Armed robbery or armed intruders
   - Basic first aid

DIDACTIC DIRECTIVES:

1. In view of the specialized themes of this module it could be considered to invite specialists from the field of safety and security to inform/address students and answer possible questions in this regard. Some aspects on workstation security could be dealt with by a competent secretary/management assistant.

2. Student notes on the themes of this module could be supplemented by an assignment(s) given to a few/group of students to collect specialized information from different firms and to report back to the group. Class discussions on these themes are highly recommended.

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<td>119</td>
<td>Helping with travel arrangements</td>
<td>On completion of this module the student must be able to:</td>
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<tr>
<td>1.1</td>
<td>Construct a planning document for an envisaged business trip by the manager.</td>
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<td>1.2</td>
<td>Briefly elucidate on the procedure to be followed and information to have available when the service of a travel bureau is used for making travel arrangements.</td>
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<td>1.3</td>
<td>Given a case study on a proposed business trip by the manager, explain and, where applicable, demonstrate in a simulated situation the secretary’s/management assistant’s duties in connection with this business trip with special reference to the following:</td>
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<td>Arrangements for the trip</td>
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<td>o Travel information file (in detail)</td>
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<td>o Preparing the itinerary</td>
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<td>o Choice of mode travel (refer to policy of undertaking)</td>
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<td></td>
<td>o Choice of accommodation (refer to policy)</td>
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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 a 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.

MODULE 6: FINANCIAL RECORD-KEEPING AND MANAGEMENT

145 1. Remittance register

1.1 Given a case study or in-basket assignment and the necessary documentation, correctly complete a remittance register for money received in the mail.

147 2. Basic wage system

2.1 Given a case study or in-basket assignment and the necessary documentation, correctly complete time cards, a wage sheet, analysis of notes and coins and wage envelopes (for at least 3 employees).

155 3. Petty cash management

3.1 Given a case study or in-basket assignment and the necessary documentation, correctly complete petty cash vouchers and write up a petty cash book.
### 3.2 Briefly explain the following safety measures built into a petty cash system to prevent loss of money:
- Control of float
- Procedure for validating expenses
- Accountability procedures and security

### 160
4. Depositing of money

4.1 Given a case study or in-basket assignment and the necessary documentation, correctly perform the following:
- Total receipt book for deposit
- Count money and prepare cheques for deposit
- Write up a cash control sheet
- Prepare deposit slips (for banks, building societies and the post office)

### 164
5. Internal claims

5.1 Given a case study or in-basket assignment and the necessary documentation, briefly explain policy prescriptions and control measures for internal claims and then correctly demonstrate the verification and preparation of internal claims (entertainment, travel, etc.) for processing by the finance department.

### DIDACTIC DIRECTIVES
1. Students should be able to deal with money received in the mail, the wage system, petty cash management and the depositing of money in a very practical manner. Proper case studies/in-basket assignments with the necessary documentation and information bases on real-life situations in the office should be furnished to students to give them ample opportunity to develop these skills.

2. The importance of financial discipline should be stressed and students could be encouraged to draw up a personal budget to encourage and develop financial management. Skills in the four basic calculations, i.e. addition, subtraction, multiplication and division should also be developed.

### Module 7: Auxiliary Services

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<td>170</td>
<td>1. Financial services</td>
<td>On completion of this module the student must be able to:</td>
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<tr>
<td></td>
<td>1.1 Briefly explain the services rendered by the following financial institutions:</td>
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<td>Banks</td>
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<td>Building societies</td>
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<td></td>
<td>Insurance companies</td>
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<td></td>
<td>Acceptance banks</td>
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<td></td>
<td>Discount houses</td>
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<td>172</td>
<td>2. Financial products</td>
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<td>2.1 Compare the following financial products of banks:</td>
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<td>Current bank account</td>
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<td>Savings account</td>
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<td>Fixed deposit</td>
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<td>Investments</td>
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<td>2.2 Explain a current bank account and overdraft facility under the following headings:</td>
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<td>Purpose of each</td>
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<td>Opening of a current bank account</td>
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<td>Cheque – completion, signing, crossings, endorsements</td>
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<td>Application for a bank overdraft</td>
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<td>Deposits</td>
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### 2.3 Explain the following card and related products of banks with special reference to application for, uses, advantages and disadvantages of:

- Credit cards
- Garage cards
- Company cards
- Petrol cards
- Smart cards
- Banktel
- New developments

### 3. Telecommunication services

#### 3.1 Elucidate on the following telecommunication services available to business undertakings with special reference to benefits of these services:

- Telephone services (including cellular phones, radiophones, car phones)
- Telegraph services
- Telematic services (Telex/PC-Telex, Teletex, Beltel)
- Data links (devices, modems, channels, communication protocols and date
communication procedures)
- Teleconferencing services
- Communication services (electronic bulletin board, on-line information, electronic mail, voicemail, (fax)
- Computer networking to electronic telecommunication services
- Phone cards and telephone credit cards
- New developments

### 4. Transport services

#### 4.1 Briefly state the economic contribution of transport services

#### 4.2 Given a case study on goods or documents to be sent to a specific venue, substantiate / recommend the most suitable form of transport (cost, speed, availability) for a specific consignment of goods/documents, correctly complete the necessary documentation and briefly elucidate on the procedure to be followed when using each of the following means of transport (both nationally and internationally):

- Rail
- Road
- Sea
- Air
- Courier services

### 5. Insurance services

#### 5.1 Briefly explain the function of insurance and distinguish between insurance and assurance.

#### 5.2 Give short definitions/descriptions of the following insurance terms:

- Insurance contract
- Parties involved
- Indemnification
- Risk assessment
5.3 Explain the following types of insurance available to trading, service and manufacturing undertakings:

- Fire insurance
- Fidelity guarantee
- Accident insurance
- Travel insurance
- Life assurance (of partner)

5.4 Briefly explain the following insurance products available to employees and given a case study, complete the necessary documentation for insurance products administered by business undertakings:

- Pension and provident fund
- Annuities
- Unemployment insurance
- Workmen’s compensation insurance
- Personal accident insurance
- Medical insurance
- Group insurance

197 6. Marketing services

6.1 Elucidate on marketing services with special reference to:
- Market research
- Advertising and sales campaigns (distinguish between sales and marketing)

198 7. Brokerage

7.1 Write explanatory notes on the following aspects of the Johannesburg Stock Exchange (JSE):
- Economic importance of the JSE
- Functions of a stock exchange
- Terminology (stocks and shares, members, bulls, bears, stags)
- Reasons for buying and selling of stocks and shares
- Method of buying and selling stocks and shares
- Reuter reports

DIDACTIC DIRECTIVES

1. The aim of the learning content of this module is to enlighten prospective secretaries/management assistants on all the auxiliary services rendered to the business community.

2. As secretaries/management assistants will constantly be coming into contact with, or make use of these services on behalf of the business undertaking it is, therefore, necessary that she should have a good knowledge and background on these services and should know how to go about using these services on behalf of the undertaking.

3. The skills required to look up information on the services and especially to complete the necessary documentation or follow the correct procedure, should be developed to a high degree of accuracy.

4. Students or future secretaries/management assistants should be encouraged to use their knowledge of the auxiliary services in the interest of the undertaking, in assisting the manager and also to be able to converse on general business matters. The importance of reading financial and business magazines and Reuter reports should be stressed.
MODULE I: ORGANISATIONAL STRUCTURE AND OFFICE LAYOUT

OVERVIEW

At the end of this module, you should be able to:

• Name the departments in a business; explain the functions of each department; their influence on each other and their contribution to the organisation.
• Draw an organisational diagram showing the departments and posts; explain the line and staff functions and distinguish between the horizontal and vertical functions in the hierarchy.
• Explain why it is important to know about each department, its functions and the contact persons.
• Explain how to deal with enquiries and customers’ problems.
• Explain the flow of documents, memoranda and circulars and indicate the departments involved.
• Explain how to have a variety of documents signed before they are distributed or used.
• Differentiate between the concepts of authority and delegation as well as the levels of decision-making and say why it is important to know this.
• Discuss why it is important to know the organisational structure and sources of information when data has to be gathered, arranged and distributed among departments.
• Familiarise yourself with the work areas and meeting facilities and make a list of these available to administrative staff.
• Understand the ideal office environment and conditions with regard to light, air, temperature, colour and noise.
• Discuss and compare different types of offices in large businesses according to their nature, use, layout, advantages and disadvantages.
• Explain how to create a safe and comfortable working environment.
• Explain the concept of ergonomics and say how it can contribute to productivity.
• Explain what makes office furniture effective and how to sit correctly.
UNIT 1.1: THE ORGANISATIONAL STRUCTURE

A medium to large business has grown from a few skilled individuals taking responsibility for all the tasks and responsibilities to an organisation in which people who share the same skills are grouped together in sections and functions. These sections may be referred to as departments, although bear in mind that the employees within that department might work on different levels throughout the organisation.

Not every organisation will have all of these departments. As a company grows and employs more people, it will branch sections of the organisation off into different departments. Although businesses differ in purpose, size and focus, most of them have the following departments: general management, purchasing, production, marketing and sales, finance, administration, public relations and human resources.

The functions of the departments in an organisation

General management
This department is responsible for the overall management, structure, operation and survival of the organisation. It creates long-term strategies, policies and plans; oversees the managers on lower levels; and often consists of a board of directors who sit together to make directional decisions for the business. The person appointed to manage the organisation can hold one of several titles such as chief executive officer (CEO), general manager (GM) or president of the company. The heads of all the other departments report to the CEO on how they are running their individual functions to reach the organisation’s aims.

Purchasing
For any business to operate successfully, it needs to procure or buy certain supplies and materials. The purchasing department buys what is needed to run the business, to produce products and deliver services. Since this department needs to make many purchases, it works closely with the finance department to stay within budget and handle payments. It is the purchasing manager’s responsibility to build positive relationships with suppliers and to negotiate the best quality products at the best prices.

Directional decisions: decisions about what direction or course of action a business should take

CEO: chief executive officer
GM: general manager

Procure: to acquire or buy something

Production
The production department and staff are responsible for the manufacturing of products with the raw or semi-finished materials the purchasing department buys. The manufacturing process must be well managed and controlled so that the maximum number of products of the best quality can be produced as fast as possible in the available factory space. Quality control is important and is dependent on the quality of the supplies.

Marketing and sales
This department’s two functions need to be integrated in an organisation. Even if businesses split these into two different departments, the sales team should still be involved in the organisation’s overall marketing strategy. Marketing involves a more strategic approach consisting of the following:
• Market research
• Product research
• Identifying potential customers
• Developing a product
• Pricing a product
• Promoting a product
• Managing relationships with current customers

Sales is only a small part of this process and involves persuading customers to buy a product.

Finance
This department controls the company’s finances. All the other department managers must submit their annual budgets to the finance department. The financial manager will then decide what the business can afford. The finance department needs to control every payment as well as all the money the organisation receives. This department needs to track income and expenses, salaries, interest rates, inflation, exchange rates, price changes and taxes, and keep a record of everything. The company’s books must balance and be submitted to SARS at the end of each financial term.

Administration
This department is responsible for processing the daily documentation and administration that managers may need, otherwise referred to as executive duties such as processing paperwork, handling correspondence and deliveries, emails and telephone calls, making travel arrangements, filing and faxing and overall office management as well as diary management, event management and arranging and keeping the minutes at meetings.

Public relations
The public relations or PR department deals with the image of the organisation. It focuses on building positive relationships with staff as well as external stakeholder groups such as customers, agents, suppliers, distributors, vendors, the government and the media. PR professionals have a difficult job since they are not working with anything tangible. Instead, they must influence people to have a positive idea, perception and impression of the organisation.

Human resources
The human resources or HR department is responsible for dealing with staff. It formulates job descriptions, places advertisements for vacancies, interviews people and hires and signs contracts with new employees. HR trains and develops staff, evaluates their progress and deals with their leave applications and labour issues. HR staff members need to be familiar with the South African labour law.

HR: an abbreviation for human resources
PR: an abbreviation for public relations
SARS: South African Revenue Service – informally referred to as ‘the tax man’
Stakeholder: a person or group with a direct interest in an organisation
Tangible: a thing that can be touched or felt. An apple is tangible; an idea is not
Activity 1.1 Group work

Sometimes the best way to learn is not to listen to someone but to teach someone. Partner with a classmate and explain the functions of the departments to each other. Each of you should choose a different department, and tell the other what that department does. Take turns to explain any two of the eight departments and ask each other questions.

The influence departments have on one other

Not all businesses are big enough to have all eight of the departments outlined above, but all businesses need to fulfil the tasks and duties that these eight departments focus on.

Every company needs to be managed by a person or a team (management); buy supplies to operate (purchasing) or produce products with (production); and market their products or services (marketing). A business needs to pay staff, business expenses and bills (finances) and promote itself (sales). A business must keep its administration up to date and legal documentation in place (administration) and, finally, a business needs to build a positive image and positive relationships with its target audience – both inside and outside the organisation.

From the above text, you can see how the departments need one another for the organisation to function as a whole. The departments are therefore inter-related, which means they need to cooperate with each other and work together as a team for the business to run successfully.

Teamwork between departments is important.

Each staff member within each department needs to do their job well so that they can have a positive influence on those around them as well as on the business as a whole. The best way to do this is for each staff member to focus on teamwork and cooperation and to develop a positive attitude about their role. Every staff member is valuable and needs to feel like they are part of the team. Group cohesion within an organisation is important for productivity and job satisfaction.

Inter-related: connected and unified
Group cohesion: a feeling of belonging
Organigram: a graphical presentation of the structure of an organisation
Hierarchy: chain of command, corporate ladder or pecking order
**The organisational diagram**

The best way to illustrate the management structure of an organisation is to draw a diagram showing the different levels of authority and lines of communication. This type of diagram is called an organogram or an organigram. For the purpose of this module, you are to refer to this graph as an **organigram**. Showing target publics what the structure of the organisation is and where divisions, departments and individuals fit in can be valuable. A diagrammatical representation of the **hierarchy** of the company:

- Provides a visual presentation of the structure of an organisation.
- Shows the hierarchy of posts within the organisation.
- Indicates the lines of communication between staff and management.
- Distinguishes between the horizontal and vertical functions in the organisation.
- Helps staff see where they fit into the organisation.

Each block in an organigram represents a department or function. The straight lines between the blocks indicate the lines of communication a person in that department must follow to communicate with other departments or managers above or next to them. If two blocks are on the same level, it means that they have the same authority.

If you had to draw a basic organigram to illustrate the eight departments discussed earlier in the module, it would look like this:

![Organigram Diagram](image)

An example of a departmental organigram

**Activity 1.2 Individual**

Draw an organigram to illustrate the levels of authority and lines of communication between the eight basic departments in an organisation.

This activity is not for marks. Your lecturer will look at your organigram and provide you with relevant feedback in class.

Some organisations do not structure their departments with the same level of authority. They may split the sales and marketing department and place advertising, sales and PR as sub-departments under the marketing department like this:
Think about it…
Are you wondering where you will fit into an organisation? The two organigrams you’ve done so far group the admin personnel together in one department, but surely managers in the different departments need an administrative assistant or secretary? It is important for you as a management assistant to know the administration function in an organisation refers to the people who share a specific skill set. They don’t necessarily have to sit next to each other. You need to provide every director, manager and/or supervisor with administrative assistance so that you are not restricted to one department.

Industry example of an organisation’s divisions.
The line and staff functions
In an organisation, some of the departments and employees are part of the core business activity and are directly responsible for the company’s survival and profit. This is called the line function of an organisation and includes departments such as management, production and marketing. If they do not manage, produce and market products, the business will not survive.

The other departments in an organisation are those that are not responsible for the overall income and profit of the business. They contribute indirectly to the organisation’s success by offering support and advice to the line functions. They are called the staff functions and include departments such as public relations, administration, finance, and human resources.

Vertical functions
Traditionally organisations have a top-down structure which, as the name indicates, refers to a hierarchy in which people with the most authority, such as the board of directors, top management and executive managers are at the top of the organisation while staff members on the levels below them have less authority.

A vertical organisation that has a lot of levels of authority in the hierarchy of posts is known as an organisation with a tall structure.

This kind of a functional structure can be referred to as a vertical organisation where the dominant coalition is at the top, followed by managers of departments and other middle managers, supervisors, staff members and eventually entry-level staff members such as clerks and interns. As you move down, the levels of authority and responsibility decrease.

Line function: a primary business activity that negatively affects income or the customer experience if it is interrupted. Line functions are directly related to a business’s objectives

Staff function: a secondary business activity that supports the line functions of a business to achieve the objectives. The people belonging to this function investigate, research and advise their line managers

Tall structure: visualise an organigram with the CEO at the top and multiple levels of management.

Dominant coalition: board of directors or top management

Decrease: to make less or reduce

The positives of having a tall structure or many levels of authority are:
• There are clear lines of authority.
• There is tight control over tasks.
• Managers can monitor their staff closely.
• Every level of authority has clearly defined tasks.
• Every level reports to the level directly above it.
• Staff members know the next position they could be promoted to.

The disadvantages of a tall structure are:
• Staff at the bottom of the chain can feel less valued and unimportant.
• Decisions can take a long time to reach lower level employees.
• Many levels of authority means it is hard to communicate upwards.
• All the decision-making power is centralised at the top.
• A weak leader at the top can hold an organisation back.
Vertical organisations have many levels of authority.

**Horizontal structure:** also called flat organisational structures, they have fewer levels of management and employees often have more autonomy

**Peers:** your equals, colleagues or fellow employees

**Horizontal functions**

An organisation that has fewer levels of authority and more positions or departments next to each other on the organigram, rather than underneath each other, is known as a **horizontal structure.** In a structure that is horizontal, managers of each department report directly to top management. This management style is less authoritarian and more peer-like where people feel that they are equal, although their skills and purposes are different.

The person managing each department does not have to go through two, three or four levels of managers, directors and vice-presidents to communicate with the dominant coalition of the organisation.

The advantages of having a flat structure or fewer levels of authority in an organisation, are:

- Employees are happier in their jobs because they have more freedom and **autonomy.**
- Staff members all have to work closely, which results in good **inter-departmental** relations and cooperation throughout the organisation.
- Communication is streamlined and less complicated.
- The organisation can adjust and change more easily and faster because communication is more open and less structured.

**Autonomy:** independence and self-rule or the sole responsibility and accountability for something

**Inter-departmental:** between departments

Horizontal organisations have fewer levels of authority and peer-like relationships.

The disadvantages of having a flat structure in an organisation are:

- Project leaders have high levels of responsibility but little real authority over their team members.
- The lack of firm control can lead to fingerpointing when things go wrong.
- Flexibility and lack of firm control can limit productivity.
Activity 1.3

Informal assessment – class test
Use the Student Book to answer the following questions in detail. Write your answers in class and follow the lecturer’s instructions. A fellow student will assess your answers:

1. What eight departments do you find in a big organisation? (8)
2. Explain what an organigram is. (4)
3. What does it mean if a business has a flat structure? (3)
4. How are line and staff functions different? Write two sentences to explain what each function focuses on. (2)
5. Identify three benefits of having a vertical organisational structure with many levels of managers. (3)

Total 20 marks

This assessment can count towards your theoretical mark.

UNIT 1.2: THE ORGANISATIONAL STRUCTURE AND THE MANAGEMENT ASSISTANT

Why it is important to know the organisation

As management assistant or secretary, you will often be the first point of contact for both internal stakeholders such as managers, colleagues and other staff members, and for external stakeholders such as clients, customers, suppliers, distributors, agents and the media. You need to know the purpose, function and structure of the organisation well so that you can help with relevant information or refer employees or people visiting the company to the right person if you are unable to help them.

You need to know your organisation’s objectives, the products and services it offers, its processes and policies, its target audiences, the structure, departments and contact persons in each department, its lines of communication, competing organisations, where it operates, the channels it uses to communicate to stakeholders and the types of media it uses.

It is important to know the mission, vision, products and policies of your organisation.

Activity 1.4 Individual/Class discussion

What is the difference between the vision and mission of an organisation?

Do research online, in the library or use an encyclopaedia or thesaurus to find out the differences between the mission and vision. Your lecturer will facilitate a class discussion in which you need to share what you have found out.

You will be evaluated based on: the correctness of your information (5), your sources and referencing (5) and your participation in class (5).
The procedure for dealing with referrals and customer complaints

When a customer contacts the organisation with an enquiry or a complaint and that customer gets referred to you, you must treat them as a valuable asset to the organisation. Pay attention to their enquiry and handle the situation professionally. The procedure for dealing with a customer for a referral or with a complaint is almost the same:

- Make the customer feel valued.
- Show you care.
- Listen to their concern or comment.
- Show real interest in what they are saying.
- Acknowledge that what they are saying is important.
- Never ignore a customer.
- Never get angry.
- Never make the customer feel like they are wasting your time.
- Remain calm, patient and friendly.
- Provide complainants with options – this makes them feel they have some control.
- Never become emotional when dealing with a complaining customer. If you feel frustrated or angry, do not show it by being sarcastic or impolite. Do not be too informal or familiar.
- Say when you do not know the answer and refer the client to a manager who will be able to help them.

When to refer a client:

In customer service it is often necessary to escalate a client to a supervisor or manager. When dealing with an upset, dissatisfied or complaining customer there often comes a point where you need to refer that client to someone who has more knowledge and expertise, or who has more authority and decision-making power than you to assist the client and meet their service needs. Referring such a client to someone on a higher management level than you is called client escalation.

Activity 1.5 Individual

Scenario:
Lucy is the management assistant in the sales department of an upmarket office furniture store called Class and Comfort. One of their clients, Mr Chetty, is unhappy with the furniture he bought from the store three days ago. He is returning the order because he claims it is the wrong colour. Lucy offers to exchange the furniture for the colour he ordered, but Mr Chetty demands a refund. Lucy knows this is against company policy and she might lose her job. She bursts into tears and rushes out of the store to avoid the situation.

Application question:
Based on what you have learnt in this module, what should Lucy have done to better assist Mr Chetty? Suggest at least 10 guidelines that might have helped her in handling this situation. Submit your answers to your lecturer for assessment.

Always remain calm, patient and friendly with a customer.
The flow of documents within the office

For an organisation to reach high productivity and create a high level of job satisfaction, information needs to reach all staff members. This can only be done if the flow of documents within the office is well planned and implemented. This is known as managing the flow of documents. Information in the organisation is part of the secretary’s responsibilities.

The flow of documents
Business documents such as proposals, reports, memoranda and circulars have the characteristic of moving from person to person. That is why it is referred to as the flow of documents within the office. Take for example a letter to staff to officially inform them that the leave procedure has changed. The HR manager will **dictate** the letter to the secretary who types it, the GM will sign it off, the administrative clerk or mail room assistant will print it on the organisation’s letterhead, the secretary or clerk will deliver it by hand to each staff member who will read it. It flows from person to person before it reaches its end reader.

The flow of documents, memoranda, agendas, information documents, circulars and electronic mail can involve several key people, departments and sections in an organisation to take it from dictation or drafting to creation, revision, approval, reproduction and distribution. The process for creating and distributing documents in the traditional office differs from that in an electronic office.

The process in either office begins with an input such as the purpose of the document, the ideas given by managers and the context it is written in. Then the document needs to be created. The management assistant needs to use the right style, format, structure and type of document to communicate the message. It might need to be re-read and revised, edited and proofread before final approval. Now it can move to the outputs phase. In this stage, the final document is created. It may take the form of an email, letter, fax, memorandum or report. Lastly, the document needs to be distributed and suitably stored.

This process is called the Systems Model of Writing Workplace Documents and can be illustrated as follows:

**Dictate:** read out loud, word-by-word

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**Inputs**
- Context
- Message
- Dictation
- Ideas

**Transformation Process**
- Style, format, structure and type
- Read and re-read
- Revise, edit and proofread
- Approval from management

**Outputs**
- Emails
- Letters
- Faxes
- Memos
- Reports

The Systems Model of Writing Workplace Documents
*(Based on Donohue et al, 2009)*
Flow of documents in the traditional office

Before computers and word processors, the flow of documents in a traditional office involved input in the form of dictation and/or drafting. Then the document was typed on a typewriter. The dictating manager would review the typed document after which another manager might verify and sign off on the information, style and structure of the document. Output in a traditional office did not have the option of using email, which is why printed hard copies were distributed by hand or ordinary mail. The only way of storing documents in a traditional office was by filing the printed hard copies or archiving them in a box or storage facility.

A typewriter was used to create documents in a traditional office.

Flow of documents in the electronic office

The flow of documents in the modern electronic office has input in the form of dictation or electronic briefing via email, teleconference, Skype or video streaming. Then the document is created in electronic format on a computer. Drafts may be distributed electronically to the dictating manager and/or any other manager whose feedback and/or approval is needed. Once the document type, style, structure and wording are electronically verified and signed off via a confirmation email, the document can be finalised for output.

The electronic office allows documents to be printed using a printer or distributed electronically via email, fax to email or email to fax in all sorts of different formats, such as PDF files, Jpeg images, Excel spreadsheets or PowerPoint presentation slides.

Electronically created files can be stored on hard drive, external drives, sky-drives, flash drives or shared on internal networks or intranets. They can also be printed and filed. Electronic back-ups are usually kept as well.

Data processing and document creation is done electronically in the modern office using computers and computer software.

The process for getting documents signed

Before documents can be distributed, they must be signed off by the right manager. In some cases, this will mean that the document such as an official letter printed on a company letterhead will need a manager’s physical signature before it is mailed to the recipient.
An official document needs to be signed by a manager.

In other cases, a manager will sign off on the contents of a document, stating that they have read it and there are no further changes that need to be made to it. They approve that the document can be distributed as it is, but their actual signature isn’t on the document that goes out. An example of a document that gets signed off in this manner is an advertisement for a newspaper or magazine. A manager will sign off on the layout, design and colours and this will serve as the go-ahead for the advert to be published.

Signing letters

The management assistant must handle the signing of letters in an organised way. Because it takes time and effort for a manager or supervisor to sign letters and other correspondence by hand, the management assistant can help by making sure that all the documents that need signing are printed and stacked together.

If a manager needs to sign on behalf of someone else, the secretary must make sure the letter still has the title, initials, surname and designation of the manager who is absent. The person signing on behalf of someone else needs to put their own signature and the letters ‘p.p.’ on the letter to indicate that they are signing per procurationem in other words, ‘with permission’ or ‘on behalf of’.

Kind regards

p.p. K. Snyder

Mr. Jonathan Louw
Director of Sales

When signing a letter on behalf of someone else, you need to use the abbreviation ‘p.p.’

Signing circulars

Circular letters go out to a number of people inside and/or outside the organisation and usually officially communicate new information such as address changes, updated processes or policy implementation and other important organisational information. Circulars are distributed vertically downwards from top management to lower level staff and must be signed by authorised staff before being distributed.
Signing financial statements
The overall annual financial statements as well as specific income statements, cash flow statements and balance sheets all need to be reviewed and balanced, and then signed off by an accountant and the responsible directors. As a precautionary and safety measure, more than one, if not all the directors of a business, need to state they are aware of the company’s financial status and take responsibility for the state of the organisation’s financial situation when they sign off these crucial documents.

Signing contracts
Contracts are legally binding in a court of law and need to be read and understood before being signed. Only authorised personnel are allowed to enter into a legal agreement on behalf of an organisation. One of the stipulations of a contract is that witnesses need to be present when a contract is signed. As management assistant, you need to arrange for the witnesses; make sure the information stipulated in the contract is legally correct and make several copies of the contract available for the signing. Every page of a contract and its addendums needs to be initialled by the signing parties and witnesses. The last page must contain their full details and signatures. Contracts must be signed in black pen.

Signing notices of meetings
The management assistant is involved throughout the meeting process – from helping the chairman finalise the agenda points and notice of meeting through to keeping and distributing minutes. After the details for an upcoming meeting have been finalised with the chairman and other decision-makers, the secretary needs to type up a formal notice stating the date, time, venue and other details for the chairman to sign off before distributing the notice to everybody who must be present at the meeting.

Authority versus delegation
In this module, we have talked about authority and levels of authority. The management assistant needs to know what authority means and when someone in an authoritative position may give away or delegate some of their workload and responsibility.

When someone has authority, they are often given the sole responsibility for a project or task. They have decision-making power and the final say over that job. They need to see that everything gets done right and on time. To manage that, it is necessary to give staff members on their teams or in their departments some of the responsibility to lighten the workload on themselves and meet the deadline. In doing so, they are delegating their authority.

Someone who is an effective leader knows when to delegate, who to delegate to and how much to delegate to that person. Being able to trust other capable people with some of your workload is a good leadership skill. It is not always easy for someone in a line function to hand over control to someone else who is either also a line manager or part of the support structure the staff function provides.

Activity 1.6
Informal assessment – class test
Use your Student Book to answer the following question. Match the description in Column A with the correct term in Column B. Write your answers like this: 8 = K. You will assess your own work according to the answers the lecturer provides.
UNIT 1.3
ORGANISATIONAL STRUCTURE AND COMMUNICATION

Communication is the lifeblood of any organisation. It’s necessary to keep people informed and updated about processes and procedures as well progress and duties. Communication channels need to be put in place so that employees can communicate with managers above them, staff members below them and colleagues alongside them. Communication can be vertical, horizontal or diagonal.

Vertical communication

Vertical communication takes place downwards when instructions are given by top management to middle management and down to other staff members. Upwards communication takes place when lower level staff give feedback, complaints, suggestions and reports to supervisors and managers who are higher up in the organisation.

Vertical communication can flow downwards and upwards in an organisation.

Lateral communication

Lateral communication or horizontal communication happens between people on the same level of authority who work in different departments, for example, when the administrative assistant to the marketing manager needs to email the secretary or administrative assistant of the production manager.
Lateral communication flows horizontally between members of different departments in an organisation.

**Diagonal communication**
Diagonal communication is the third communication pattern in an organisation and involves up and down communication. This is communication in a criss-cross pattern. As the sketch indicates, this happens between people on different levels of authority who also work in different departments.

Diagonal communication flows up and down between employees at different levels of an organisation in different departments.

Let’s look at the following illustration:

The GM asks the PR manager’s secretary to send him information on the community project the organisation is planning for the next month. That is downwards communication. It is also diagonal because they do not work in the same department. If the finance intern emails all the department managers asking them to submit their annual budgets to the financial manager, the communication is upwards and diagonal because they work in different departments.

The three types of directionality in organisational communication. *(Erasmus-Kritzinger et al, 2005:51)*
Activity 1.7 Pairs

In pairs, answer the following questions. Use the illustration showing the directionality of communication in an organisation to answer the following questions:
1. What do the numbers 1, 2 and 3 in the graph represent?
2. What is the type and direction of communication from top management to middle management?
3. What is the type and direction of communication between two middle managers?
4. What is the type and direction of communication if the PR assistant is contacting the sales manager?
5. What is the type and direction of communication if the finance manager approaches the production manager’s secretary to type a letter for her?
6. What is the type and direction of communication if the HR manager is scheduling a meeting with the vice-president of the company?

Could you do it? Your lecturer will give you the right answers.

Gathering, arranging and distributing information

Knowing the structure of the organisation and who is responsible for the different tasks within the business enables the management assistant to perform his or her duties more effectively. The flow of information in an organisation requires data to be collected or created, arranged and structured, and then distributed among departments internally or target markets and stakeholders externally. Knowing who the key people are who need to be approached on the different levels of authority as well as the lines of communication will enable you to communicate effectively within the organisation. It will also improve productivity because everyone will know what they are expected to do.

Once you understand how the organisation works and the protocol you need to follow, you will be able to create, arrange and distribute budgets, meeting minutes, reports and personnel notices.

Data: information, facts or statistics
Protocol: the right procedure and code of behaviour

Activity 1.8 Pair work

Informal assessment – class test

Use your Student Book to answer the following questions. Indicate whether the following statements about the types and directions of communication in an organisation are TRUE or FALSE:

1. Lateral communication flows horizontally between members of different departments in an organisation. (2)
2. Horizontal communication flows horizontally between members of different departments in an organisation. (2)
3. Vertical communication takes place between people on different levels of an organisation and can move upwards or downwards. (2)
4. Diagonal communication takes place between people on different levels of authority and in different functions in an organisation. (2)
5. Diagonal communication can take place in two directions namely upwards and downwards. (2)

Total 10 marks
Assess yourself according to the answers your lecturer provides. This assessment can count towards your theoretical mark.

UNIT 1.4: THE OFFICE ENVIRONMENT

Administrative staff are needed throughout the organisation to organise, arrange, plan, produce and manage documents, events and processes. They will need to use different types of areas and facilities within the office environment.

Work areas and meeting facilities

Individual work areas
These should be well equipped with the right chair, desk, computer equipment, filing cabinets and office stationery.

Managers’ offices
These are used for briefing sessions, follow-up meetings, feedback meetings and any other form of formal contact with a manager who needs administrative assistance.

Meeting areas
These vary as meetings can take place in several possible venues – both in and away from the office. The management assistant must be able to arrange meeting venues such as boardrooms, conference rooms, breakaway rooms, auditoriums and conference centres.

Communal areas
These include the front reception, staff rooms or lounges, kitchenettes, the canteen and staff bathrooms. Not every organisation will have all of these facilities available to staff, but admin personnel will use the areas that are available.

Another big part of the secretary or management assistant’s duties is to research and be able to use several sources of information. You can use the Internet, the library and the company’s archives and storerooms to find information on just about any topic.

Ideal office environment and conditions
Staff must have the opportunity to work in an ideal office environment to be productive and effective. Contrary to what people may think, the ideal office is not one that looks great but one that works. Even if the most skilled people are working in an office with the best furniture and equipment, if the conditions in which they are working are not ideal, they may be inefficient.

The office environment is influenced by lighting, airflow and ventilation, temperature, colour schemes and noise levels.

Lighting
The size of the room and the amount of natural light will determine how much artificial lighting an office needs. Wrong or insufficient lighting lowers productivity as staff members may strain their eyes. Yellow lighting also has the psychological effect of making people feel sleepy. Lighting should be adjustable and positioned above employees so that they do not have to work in their shadows. Fluorescent lighting is popular in classrooms and offices because it casts a clear white light without a glare from computer screens and work surfaces. It is a cost effective way of lighting and creates light all around, eliminating shadows.

Fluorescent lighting enhances productivity and is ideal for the office environment.
Airflow and ventilation

Fresh air and natural airflow and ventilation will enhance productivity as they allow staff members enough oxygen to complete their tasks efficiently. If an office does not allow for windows and doors to open to allow fresh air in due to structural constraints or disturbing noise levels outside, artificial ventilation can be created with air-conditioners that extract the stale air and let fresh air flow into the room. Proper ventilation and air supply will reduce fatigue among staff, which counters irritability and a lack of commitment to their job.

Temperature

Temperature control and ventilation go together in an office. If the office is either too hot or too cold, it will inhibit productivity as both can distract or annoy employees. The more people sharing a space, the warmer a room gets due to everyone’s body heat and breathing. Seasonal temperature changes also need to be considered, which makes air-conditioning the ideal solution for monitoring and controlling the temperature, humidity and carbon dioxide level in an office.

However, air-conditioning units are expensive to install and maintain. Fans, extractor fans and air filters can keep natural air moving freely through an office space and are a more affordable alternative.

Colour

Colours have a psychological effect on people, so they should be used to set the right mood in an office and inspire positive emotions in employees. Using bright warm colours such as yellow, red and orange on the walls, in furniture, artwork, appliances, equipment, stationery and décor will create an energetic, warm and cheerful atmosphere while colours like greens and blues will create a cool and calm atmosphere.

Fluorescent: glowing and bright light using a more energy efficient gas-discharge lamp
Psychological: the state of the mind

Colour can play an important role in setting the right tone and atmosphere in an office. The colour wheel is an arrangement of primary, secondary and complimentary colours that designers use to create successful colour combinations.

We are psychologically influenced by colours. We also assign specific meanings to certain colours. In Chinese culture, for example, white is the colour of mourning and is worn mainly to funerals, while red is banned at funerals because it is considered to be a colour of joy for weddings. Even the bride’s dress is traditionally red at a Chinese wedding. What is your interpretation of white and red in your culture?
Activity 1.9 Individual/Class

Let’s see what influence colour has on you and your classmates. Write the first word (feeling, idea or memory) that comes to mind when you think of each of the following colours. Remember, just one word per colour.

Yellow________________________
Black ________________________
Red __________________________
Green _________________________
Purple _________________________
Orange _________________________

Your lecturer will facilitate a class discussion in which you can say why you associate a certain thing with a specific colour. This activity is not for marks.

Noise levels

Employees can easily be distracted by background noise and office sounds, which can make it hard for them to focus on their work. Office environments are never completely noise free – people are always talking, typing, sitting in meetings, doing presentations and having telephone conversations.

To enhance productivity and lessen the interruption to concentration levels and work flow, elements that absorb sound can be incorporated into the office design. Double doors, rubbers on the legs of chairs and tables, floor coverings like carpets, thicker walls and drapes instead of blinds can all be used to reduce noise and stress levels in an office.

Activity 1.10

Informal assessment – class test

Use your Student Book to answer the following questions in detail. Write your answers in class and follow the lecturer’s instructions. Assess your answers against the answers the lecturer reads to you in class:

1. Identify the five work areas and meeting facilities that admin staff need to use in the organisation. (5)
2. In a paragraph explain why it is important to create an ideal office environment. (3)
3. List the five elements to consider when creating an ideal office environment. (5)
4. Explain the value of colour in creating an ideal office space. (3)
5. State four ways to reduce noise levels in an office. (4)

Total 20 marks

This assessment can count towards your theoretical mark.

UNIT 1.5: OFFICE LAYOUT

The way an organisation uses its floor space can have a positive or negative influence on the staff’s productivity. Since office management will be a core responsibility of the management assistant, you must understand how to best structure an office and what to consider when planning the layout.
**Benefits of the right layout style**

Choosing the right style of office layout is more important than you might think. Directors need to consider that the right layout has many benefits, namely:

- It provides staff members with the ideal work space.
- It contributes to the productivity of employees.
- It results in the effective use of the available floor space.
- It positions and uses equipment to its full potential.
- It helps the flow of work in a controlled space.
- It influences the organisation’s clients in a positive way.
- It helps create high levels of job satisfaction among employees.
- It allows managers to supervise effectively.
- It provides the flexibility needed to expand the office.

Choosing the right office type and layout style will increase productivity.

**Elements to consider**

Organisations need to base their choice of office type and layout styles on three key elements namely: equipment, work flow and employees.

Other important aspects to consider are: the amount of floor space available, the number of people who need to work there, the type of work they do, the equipment they need, the budget, the service the company provides, whether the company will expand, the amount of privacy staff members need, the number of managers who need to be accommodated, the work and meeting areas that are needed and layout elements such as lighting, acoustics, colour and ergonomics.

**Different office types**

Offices differ in nature, use and layout. Businesses need to choose the best layout style for their needs which means that the office type that most suits one company will not be the best solution for another company. The main office types to consider are:

- Traditional offices
- Open-plan offices
- Cubicles
- Modern offices

**Traditional offices**

The traditional office is also called an individual office or an enclosed office. It is usually the type of office managers have. These offices are fixed structures that have walls and doors that close when the person working in them needs privacy. Not all individual offices are big and luxurious. Some don’t even have windows – it depends on the location and floor space available. This office type is the kind people refer to when they say that someone has a ‘corner office’ or an ‘office with a view’. They are normally more spacious and luxurious than other offices. Some individual offices are so elaborate that they have a coffee station and bar fridge, seating area with couches, cupboards for extra work clothes and sometimes even a bathroom and a private entrance.
It's more difficult for a manager to supervise employees who are in a number of separate rooms.

It is difficult to create a relaxed atmosphere among all levels of staff.

Individual offices lack the flexibility to expand and create space for new staff members.

Time is wasted in having to pass on information and get employees together for meetings.

**Open-plan offices**

An open-plan or flexible office places employees in an open space without separating them into individual offices, cubicles or other fixed office structures. This style is usually suited to the creative industries such as journalists in newsrooms, graphic designers and layout-artists where employees are given individual or shared workstations, desks, benches and computer tables. Filing cabinets and office equipment such as printers and stationery need to be shared and managed well to ensure effective work flow.

The advantages of the open-plan office include:

- Placing employees in one space promotes teamwork.
- It builds good employee relations since co-workers can immediately be asked to help with projects.
- There is group cohesion as staff learn to work together, share ideas and complete projects as a team.
- It is cheaper to furnish and decorate than individual offices.
- A more relaxed atmosphere can be created between employees and line managers who need to share the same space.
- Equipment such as filing cabinets, photocopiers, fax machines, scanners, printers and office stationery can be shared to save cost.

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Traditional offices are enclosed individual offices that are more expensive to set up and decorate but allow for privacy.

Some advantages of the traditional office are:

- Staff can be more productive because there are fewer distractions and interruptions.
- Sensitive matters can be dealt with in privacy.
- Confidential meetings can be held behind closed doors.
- Access to equipment or confidential information can be controlled.
- Offices can be personalised to suit the employees working in them.
- Heating, air-conditioning, lighting and ventilation can be adjusted to suit personal preferences.
- Noise levels can be contained.
- Telephone conversations are private.
- Infections and illnesses are less easily spread.

Some disadvantages of the traditional office are:

- It takes up more space than other layout styles.
- Communication with other staff members may be less frequent.
- It is expensive to furnish, decorate and equip.
- It can create a feeling of isolation for staff who work in cellular offices.
- Managers in individual offices can seem unapproachable.