The constantly changing workplace is a reality today. The consistency of this change is evident by the technological innovations that confront you as you go to work and go about your daily life. Technology is rapidly changing and this encourages the administrative professional to be a lifelong learner. In addition to technology, the composition of the workforce is changing constantly. There is increased cultural diversity in the workplace as well as many employees are working longer before retiring. Your success on the job depends on your ability to constantly adapt to change and to understand people of all races, ethnicities, and backgrounds.

Read about the many types of business organizations and how creativity is being used to address older workers, job sharing, and a compressed workweek. There are many types of business organizations and the administrative professional’s responsibilities will vary depending on the type of organization and structure of each. Companies must have a vision on how to include their workers in decision making and changes in the workplace.

The values that you have as a worker will prepare you to become an effective administrative professional. Read about the many ways that you can develop your “job” into a “career.” Notice the kinds of skills needed to be successful, including working as a team member, being dependable, making effective decisions, managing stress, focusing on the customer, and being a leader.

The impressions you make on others with your attitude toward work and coworkers, your professional dress and conduct, and your work ethic are your professional image. This image is important in being able to obtain a job, being able to keep a job, and being promoted. These impressions are made each day as you deal with coworkers, supervisors, clients, and customers. Your attitude is shown in your body language, your speech, and in how you look. Your work ethic shows in how you conduct yourself at work. You should always be on time, meet the deadlines, follow the rules, and be productive in your work time. How you manage your time and how you make decisions will be important in the way you are evaluated by your supervisor.

Your professional image shows when you are using your manners and appropriate etiquette at all times. Remember to be polite, to compromise, to learn from others, to be honest, to be flexible, and to give help to others when they need it. Remember that you, your work, and your desk show your professional image. Knowing how to introduce one person to another and your handshake also shows your professional manners.

Since we are in a global economic world, it is important to be aware of cultural differences. There are different customs and etiquette that must be adhered to when doing business with people from another country. It may be necessary to do some research to find out the appropriate dress, speech, and eating preferences of those from another culture if you or your coworkers are going to travel internationally.

The place where you choose to work is an important decision. The work that you perform and the people you work with can make your working days happy or frustrating. If you are not happy in your work, your productivity will be down.

Being an effective member of a team is very important. There will be goals on many levels that you and others will make and will need to accomplish. You may be a part of several different types of teams: project teams, task forces, supervisor and coworker teams, external teams, and virtual teams. The success of the team’s goals will depend on how well all members of the team interact, respect each other, and work together.

One of the most important factors in teamwork is communication. Understanding diversity, accepting limitations, accepting differences, and listening effectively will keep the lines of communication open. Being able to resolve conflict is an important part of working with teams.

Here is a quote that shows the importance of teamwork in today’s workplace.

The world of work is increasingly collaborative, giving rise to reflection about the way student projects are structured. This trend continues from 2010 and is being driven by the increasingly global and cooperative nature of business interactions facilitated by Internet technologies. The days of isolated desk jobs are disappearing, giving way to models in which teams work actively together to address issues too far-reaching or complex for a single worker to resolve alone.
Market intelligence firm IDC notes that some one billion people fit the definition of mobile workers already, and projects that fully one–third of the global workforce—1.2 billion workers—will perform their work from multiple locations by 2013.


CHAPTER 4: Self-Management

Self-management is being able to control what we do, how and when we do it, and adjusting to change in the workplace and in our personal lives. Setting realistic short- and long-term goals can help manage how successful we are in both. Everyone needs to understand that it may be necessary to set priorities and to adjust goals or how they are accomplished due to circumstances. It is important to keep motivated by maintaining our physical and mental energy by eating well, exercising, relaxing, and getting enough sleep.

It is important to manage our relationships at work and home and to balance both. Everyone has experienced stress, and it can be a good or a bad thing. Read about those differences in your text and see how to prevent and cope with it. Stress can show up in many physical and emotional forms so it is important to understand how to deal with stress in our lives. Stress can show in anger which is never an appropriate response at the workplace.

Being organized and planning well can help eliminate a lot of stress at school, at home, and on the job. There are many tools that can be used to help organize the day’s activities so that nothing is forgotten and everything is done on time and correctly. By having and sticking to a plan, setting priorities, avoiding procrastination, and working efficiently, you can complete the day’s tasks and long-term goals. Be aware of the many things that waste time in your daily routine and try to reduce them so that you are more efficient and can complete the necessary activities.

CHAPTER 5: Ethical Theories and Behaviors

Ethical behavior is very important in every company. You want to work in a company who has an ethical reputation. An organization that is ethical will be internationally aware, be honest, be committed to diversity, and be environmentally responsible. The company will also be aware of diversity for the workers that are hired and will insist that all employees also are aware of how important diversity is in the company.

There are federal laws that promote ethical behavior and there are consequences for those companies who show job discrimination. Sexual and racial harassment is not to be tolerated in the workplace, or anyplace.

You want to be known as an employee with high standards who works for a company with high morals and ethics. You must be honest, loyal, be able to accept responsibility for your actions, and keep confidential information confidential. Also remember that your personal life can affect your professional reputation.

CHAPTER 6: LEADERSHIP

After you have worked for a while in business, you may become more interested in the leadership and management of the company. It is always respected when someone “moves up” in the company. By doing your best and taking the initiative on projects, you may find that you are earning the respect of those above you and promotions will happen.

In this chapter you will learn what a leader is and how a leader acts and helps others. There will be many on-the-job opportunities to share your leadership skills. You need to have a good idea of what your goals are and how you will achieve them. You should also have a set of values that shows your loyalty and that you are committed to your company and its goals.

Try to plan and organize well as you work through your tasks each day. Doing a great job on each task will be noticed and salary increases and promotions may follow. You need to continuously work on using good communication skills, both in face-to-face discussions and in your written documents. Working effectively in a team situation and helping those around you to be successful will also show your leadership skills. You may find that you will be supervising part-time employees and this will give you an opportunity to show your motivational and delegating skills to others.

Enjoy sharing your skills and talents with those around you. The workplace can be challenging and yet very rewarding. Remember to keep learning and taking advantage of any training that is made available to you in your work environment so that you become more valuable to your employer and company.
CHAPTER 7: CUSTOMER SERVICE

“Customer service can be defined as the ability of an organization to consistently give customers what they want and need.” I am sure that you can think of many ways that customer service is important to you. You want someone to be able to answer your questions correctly and efficiently when you need information. You want to be helped without an extensive amount of waiting time and to be treated with kindness and respect. All employees in a company, regardless of their position or job, need to offer effective customer service.

There are many customer service skills that you will need as an administrative professional. Listening to and answering questions as efficiently as possible are important on the phone as well as in person. When you are helping someone face-to-face, it is very important to give that person your full attention and watch your body language. Nonverbal communication skills such as facial expressions, gestures, and voice qualities are always necessary. When you know the person, whether a coworker, customer, or client, it is important to use their name. You want to show that you do understand what the problem or concern is and that you are trying to solve it. Treating someone with respect and showing empathy shows that you have good customer service training. The common use of e-mail makes proofreading and written communication important in customer service too.

There will always be difficult situations that you need to handle. Be sure to be as tactful and helpful as you can be as you are trying to solve the problem. There is a YOUTUBE video that may help you resolve circumstances in this kind of situation.

CHAPTER 8: WRITTEN COMMUNICATION

Written communication is essential in the business world as well as in your personal life. It is vital that each document that you create uses correct grammar, spelling, punctuation, and correct format. Correspondence is the lifeline in an organization, whether it is e-mail, interoffice memorandums, letters, or reports. Remember that each document that you create is a reflection of you and your company, and you want it to show the very best of both.

E-mail is very important in our lives of today because it is a quick way to communicate. It is important, however, that each e-mail message be proofread for content, proper grammar, correct spelling, and word usage. An e-mail message must show a subject line that tells what is in the message. Each e-mail message should only contain information about one item. The message should be short, but complete. The message should be written in complete sentences, use correct spelling and punctuation, and correct information. You will read about many advantages and also disadvantages of using e-mail. When the message is longer than a half of a page, usually a memorandum is used.

Letters communicate with clients and customers and may take more time to prepare and write. The purpose or goal of the document should be determined before the writer begins. The writer must also investigate and gather the necessary information. The writer should also consider the reader of the letter when the document is written. Obviously the content and the words used will be different depending on whether the document is for a company in our country or for international delivery. A letter should be written as a draft, edited, proofread, and then a final copy made.

There are several kinds of reports that the administrative assistant may be involved in creating. The report may include some necessary research either in a library or through the Internet. Be sure to carefully document the sources of any information that you use. Remember to handle any information carefully, especially if it is classified or personal in nature.

The word processing feature on your computer will help you be a good writer. Use the speller, thesaurus, and grammar functions to help you proofread your document. Remember that these tools do not take the place of your own personal proofreading skills, however. Be complete, clear, accurate, prompt, concise, and courteous in your response to another e-mail, memorandum, or letter.

The format of your document is also very important. You have learned how to format e-mail, memos, letters, and reports in your keyboarding and word processing classes. Use those guidelines as well as others shown in your text to help you with your written communication. Be sure to check with your supervisor about preferred formatting for documents in your company.

CHAPTER 9: VERBAL COMMUNICATION AND PRESENTATIONS

As an administrative professional, you will be talking with customers, clients, and coworkers daily. It is important to have good verbal communication skills so that the information is delivered successfully. With all of the diversity in
our country today, communicating with others is not always easy. Plan your words carefully, thinking about what you need to communicate before you speak.

Listening carefully to what is said to you is very important. In fact, listening is probably the most important part of communicating with others. You don’t want to be doing something else when someone is talking with you, even if it is by phone. You want to give your full attention to that person and really listen to what they are saying.

Communicating will also involve some conflict. You may be criticized for something that was not your fault, and you want to clear up the problem in a non-judgmental way. There will always be differing opinions when you work with others. Be sure that you think before you speak so that the words used convey the appropriate response and answer. Be sure to use the appropriate tone in your voice as well. This can be difficult with difficult people or situations, or when you do not feel well.

How you manage incoming and outgoing telephone calls could be a big part of your job. Be sure that you are using a smile when you answer the phone. You should also be sure to take good notes so that your messages are accurate. If you are not familiar with the phone system, be sure to ask for help so that calls are answered and transferred efficiently.

Non-verbal communication is another important part of communication. Your facial expression, eyes, posture, hands, and gestures all tell something about how you are feeling and what you are saying. Read about those items in the chapter and become aware of how you appear and sound to others.

Using PowerPoint is one effective way to share information with a group, since visual aids can deliver a message while you are talking. You may be asked to give presentations to large or small groups, so be sure to use the program effectively and always proofread. You will want to practice your presentation before giving it before a group which will eliminate some anxiety.

**CHAPTER 10: GLOBAL COMMUNICATION—TECHNOLOGY AND ETIQUETTE**

This chapter covers the many ways that text, data, voice, video, and images are transmitted. These can be transmitted with computers, phones, personal digital assistants, and, of course, through the Internet. I’m sure that this chapter could be updated each month with new available technology. You will be familiar with many of the items discussed in this chapter, and many will be new to you as well. Familiarize yourself with the terms so that you can discuss intelligently the vocabulary contained in this chapter.

The most important way to communicate is still through the telephone. There are many different kinds of phones available, but there is courtesy necessary with all of them. Answer the telephone as soon as you can and after the first or second ring, if possible. Always answer the phone with a smile on your face and speak clearly and distinctly so that you are understood. You should always identify yourself and the company. When you need to place a caller on hold, be sure that you have the person’s permission and if the call is not answered quickly, go back to the caller and take a message. If you need to transfer a call, be sure transfer it to the correct person and always tell the caller the phone number and name of the person who will answer. When you are taking messages, be sure to write legibly the name and phone number as well as the message itself, showing the date and time.

E-mail is addressed in this chapter once again. This is a very popular way to communicate, but guidelines need to be followed so that the message is clearly understood and sent to the appropriate people. Be sure to proofread these messages for content and typographical errors. Remember that e-mail is not a secure way to send a message. The IT department personnel at your company can read any e-mail that is sent.

**CHAPTER 11: MANAGING RECORDS**

This chapter covers a review of your records management class. You will be using the ARMA filing rules that you learned to complete your assignments in that class. Remember that you are using a standard system for filing so that the record can be easily found when needed. Learning and using the life-cycle of a record means that a business will be successful in storing and retrieving a document when it is needed. Records are assets to a company that show the history of a company, can be used as legal evidence, have financial value for audits and tax purposes, and are used every day to conduct business. Records are also important for each worker at the company for payroll and taxes.

A review of the rules as well as the products needed and used for storing records is given in this chapter. Remember that there is subject and numeric filing needed in business as well as the alphabetic system that is used most often.

Although organizations may employ slight variations on the ARMA rules, most organizations follow them. You should always ask if the filing is completed in a different way than the way you learned.
CHAPTER 12: MANAGING ELECTRONIC RECORDS

Since electronic records are becoming more prevalent in business today, it is important that these are created and stored correctly. In this chapter, you will learn about electronic and image records. You learned about creating electronic files in all of your classes using Word, Excel, Access, PowerPoint, and many other software packages. Another important aspect of using electronic records is backing up records on a consistent schedule.

One of the most important steps for electronic records is giving the document a meaningful and logical filename. Being able to easily find the record will guide how filenames are created. There must be consistency throughout the company in order for all files to be easily accessed in a timely manner. Be sure that you are learning the proper procedure for naming any document you create in your workplace. Electronic files will go through the same life-cycle as paper documents, and the process is important to understand for each type of file.

Document imaging is also becoming more important for storage of records. Long-term storage of paper and electronic records is necessary for historical and legal reasons. Scanning paper documents and converting them to digital images is a way to store records efficiently and use less space. Microfilm, microfiche, and aperture cards are efficient types of microforms. There are steps that need to be followed for microfilming to be an effective method of record storage. Be sure to study the steps involved.

Determining how long a record should be kept and when it should be transferred is also important for a successful business. Since not every piece of paper or each electronic record needs to be kept, it is important to understand the disposition phase of the life cycle. Each company will have a retention schedule set up to help keep records in good order.

CHAPTER 13: PERSONAL FINANCE AND INVESTMENT STRATEGIES

In this chapter, you will learn how to evaluate your personal finances. This includes developing a plan, creating a budget, and setting financial goals. As you read through the chapter, you will find ways to improve how you spend, save, and manage credit. As an employee, you will have choices to make about benefits that the company is offering you as an employee. Even though retirement may be not in the near future for you, it is important to have a plan.

As an administrative professional, you will be preparing some financial statements. It is important to understand the types of statements and what is contained on each. Three common statements are the balance sheet, income statement, and cash flow statement.

Remember to double-check figures and any mathematical functions that you are keying into any document. Proofreading is an essential skill when working with any numbers.

CHAPTER 14: MEETING AND EVENT PLANNING

This chapter covers meetings and planning events that occur in an office environment. This can be a very rewarding task and even a fun challenge, depending on the events and the needs of your company.

You may be asked to set up meetings for your employer or to be in charge of a meeting for your peers and co-workers. There are many types of meetings and what is expected will differ depending on the meeting. There will be tasks that need to be accomplished before, during, and after the meeting. A fairly new type of meeting is an electronic meeting which is being used in part to eliminate costly travel expenses. There are advantages and disadvantages to this type of meeting so face-to-face meetings are still more frequently used. Documents used for a meeting usually include an agenda, minutes, nametags, and any handouts. Proofreading is always very important!

Your responsibilities for an event will be many and varied, depending on the type, size, and place. As you read this chapter and work through the assignments, you will see how you as an administrative assistant will make a difference in how the company and your supervisor are perceived. It is important to do your very best to have everything in good order for the event—regardless of how big or how small. The time needed to prepare will also differ depending on the event. Keeping a list of the places and companies that have been used in the past will be very helpful in determining whether they will be used again or not. This could involve hotels and caterers.

There will be duties that you will perform before, during, and after the event. Be sure to take notice of these items as you are reading through the text and applying the information in the documents that you will be preparing.

CHAPTER 15: TRAVEL ARRANGEMENTS

Your employer may be involved in travel in order to complete his or her job. It will be your responsibility to help set up the appropriate travel plans. Some companies will use a travel agent to determine the flights for the employees,
but there will be some that this is your responsibility. Knowing what your employer needs and wants and the timeframe needed for the travel are important for setting up an itinerary.

This chapter will show you airline ticketing information as well as other items needed for airline travel. Remember that airline restrictions and rules change almost daily and some of the information may be outdated in the text. Because of these changes, research will be involved before any travel. If travel is international, there will be more involved in setting up flights, researching cultural differences, and exchanging currency.

Setting up hotel and car reservations may also be needed for your employer. Keeping a list of what is expected in the accommodations for both will help you be successful in this task. Obviously there will be differing needs if the travel is international or for a long period of time.

An itinerary is a very important document when traveling. This itinerary will show when, where, what is needed, and who is meeting with the employer. Your employer may have other items that need to be included to help him or her to have a successful trip.

Remember, too, that there will be responsibilities that are different for you at the office while your employer is traveling. Opening and checking the mail and e-mail, taking messages, setting up appointments, and handling situations that arise will be expected. After the trip is completed, there will be expense reports to complete and correspondence and reports that will need to be prepared.

**CHAPTER 16: WORKPLACE MAIL AND COPYING**

In this chapter you will be learning about the different ways that mail can be delivered. We are all familiar with the United States Postal Service (USPS), and it is probably the most commonly used. You will learn about the many classifications that the USPS offers to its customers. These are available at any post office and the rates vary with the classification. It is important to understand the differences so that you can make knowledgeable decisions when the need arises.

There are also many private mail services. You probably have one near your home or business. These can also be used to deliver different classifications of mail. Sometimes these companies also will do the packing for items besides mail that need to be delivered.

There are certain guidelines that must be followed when you are the person responsible for the outgoing mail. Be sure to check for the correct mailing address, including the ZIP code, as well as anything that should be included with the document. There may be a centralized mailroom that handles the postage for outgoing mail.

When you are responsible for the incoming mail, there are certain tasks that must be accomplished. If there is a centralized mailroom, mail is usually sorted by department and then delivered to a specific person who is responsible. If you are the person responsible, you would sort the mail by person and be sure that it is delivered to that person. If you are asked by your employer to also open the mail you would have more things to check. You would want to be sure that anything that is confidential or personal would not be opened. Advertisements and magazines would be set aside with newspapers and catalogs. First class mail would be opened and checked for enclosures or attachments. If an item is missing, a note should be placed on the document. Mail is always date stamped and can be time stamped as well when it is opened. This can be very important for certain deadlines on bids or contracts.

You may be asked to read and annotate the mail for your supervisor. You will read the document and note items of interest, dates, conflicts, and place this on the document itself, or on a Post It note. Your supervisor can then read these items and follow through easily. This activity may be especially important when your supervisor is out of the office. You may be asked to answer some inquiries and to solve some problems. Always be sure to document how you handled the issue.

Using copiers is another important task. There are many copiers available in the market and they have many and varied features. When you are helping decide on a copier for your company, you would need to do research to find out which features are really needed and be aware of the cost of the machine. Another item that is important is the maintenance contract. As you are reading your text, you will find many examples of features available. There, of course, needs to be some control over the copy machine. The machine should only be used for business purposes and not for personal copying. Permission would have to be given to use the business copier for personal use. There are also guidelines and rules about what can be copied. You would want to adhere to all copyright rules.

In this chapter you will also read about shredders and fax machines. A shredder is of great importance to you in your office as well as in your personal life. If you have not used a fax machine before, be sure to ask for help the first
time you use one. Recycling is also of importance and most companies are doing some in their office. Be sure to check to see where you can recycle cans, bottles, and paper in the company where you are working.

CHAPTER 17: JOB SEARCH AND ADVANCEMENT

Since this course is the last one in your certificate or degree program in the Office Systems Technology program, part of the course is to help you with your resume and job search. This chapter covers many topics that will be helpful to you.

It is very important to be happy in the career that you have chosen. You will be spending many hours at work so it is important that you determine what type of business you want to work for, what distance you want to travel to work, and what types of jobs you will be expected to perform while at work.

You need to evaluate your skills. You have taken many courses in order to learn and refine your skills. You will always want to improve your skills and keep learning so that your skills are current and marketable. Remember that “soft skills” are also important—writing well, working with people, communicating effectively, and being a self-starter. Your interests also play an important part in the career path you are taking. If you are interested in medical offices, you have taken additional courses in that field. Your strengths in those particular areas will lead you to places where you can use those skills.

You need to have a plan for a job search. You should have targeted various areas of the city that you would be willing to travel to, the size of the company—large or small, and you should also have an idea of the salary you would expect to receive. When you have determined a few of these items, your search then can be focused. If after some time you need to expand that focus, you can. You also need to set goals for yourself so that you are using your time wisely as you are looking for a position.

Networking is a very important part of a job search. You need to let as many people as you can know that you are looking for a job. Each one of them may be able to help you with a contact person. You can use family members, friends, neighbors, and teachers to make suggestions. Have a business card ready to leave with them so that your contact information is easily shared.

Searching online is also an option. Narrowing the search may be more difficult that way, but it can be an effective tool. Employment agencies and newspaper ads are still effective ways to locate a position. Employment agencies may be able to help you find a temporary position that can lead to a full-time position in that same company.

You need to prepare your resume. The textbook gives you many suggestions for this project. There are some other examples in the files in the J112 file cabinet as well. Be sure that you proofread your document carefully so that everything is accurate and formatted correctly and consistently. Most companies are not asking for references on the resume or even an application. They will, however, ask for them when you are being offered a position with the company. You should always ask permission to use someone as a reference.

An application letter and a follow-up letter are also important to the job search process. Remember to proofread them carefully for typographical and formatting errors.

Read the information about the interview process. Be sure that you dress appropriately and arrive a few minutes early. If you are unclear of the location of the interview, be sure that you know how to arrive on time by having a map, or by even going a day earlier. You should have questions ready to ask the interviewer about the job and the business. The textbook gives you a list of some questions that might be asked. Be sure to read through these and other examples in the file cabinet. You should have an answer prepared for each.

Finding the right job can be a “full-time” job. You will need to work at this process diligently so that you achieve your goals. When that right job is found, you want to always do your best. When you are doing your best, showing initiative, and doing your job well, you may find that you will be promoted. Remember to network, keep up with changing software and other job requirements, and hold to your values.

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