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# HOW TO BE AN EFFICIENT SECRETARY

(An essential work-book for all Secretaries and P.A.s)

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## HOW TO BE AN EFFICIENT SECRETARY

### An essential work-book for all secretaries and P.A.s

- \* Handle the boss's travel arrangements
- \* Write letters for your own signature and for the boss's signature
- \* Handle arrangements for conferences
- \* Hire assistance and substitutes when necessary
- \* Supervise the work of an office of clerical assistants
- \* Handle office housekeeping duties and courtesy errands for your boss
- \* Manage the redecoration of the boss's private office.

#### The job peculiarities - I

Every job has its peculiarities. What is peculiar about your job as a Secretary?

Where does it differ from other jobs? What are its unique features? Please give your comments here:

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#### The job peculiarities - II

Would you say these are some of the job's unique features?

- 1
- \* You work for one boss\*\*
  - \* You work in a confidential capacity
  - \* You are an integral part of an executive team
  - \* You act as the boss's public representative.

\*\* Occasionally, you work for an executive team made up of more than one - as for example, Chairman and Managing Director.

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#### The pleasures and Pains - 1

What do you think are the pleasures and pains of your job?

Please give your comments here:  
Pleasures:

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Pains:

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#### The pleasures and Pains - II

The following bright and dark spots have been reported:

The Bright ones:

- \* You get all the thrills of an executive job without any of the risks the job involves
- \* You get to know more about the boss's job
- \* You get to know more about the boss
- \* You get opportunities to establish a relationship of trust and mutual respect
- \* You thereby get opportunities of being assigned to responsible positions of trust and responsibility.

- \* You can't be individualistic
- \* You have to be at times a silent sufferer of your boss' moods
- \* You are not the master of your time—not quite.

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### The Job Demands

Any job demands much of the following; but more so the job of a secretary.

- \* The job demands that you act as a buffer for your boss; that you cope with the hundreds of unexpected incidents that can disrupt the office routine.

Therefore the job demands that you be poised and gracious.

- \* The job demands that you play your boss's representative.

The job therefore demands that you be adequately equipped physically in appearance and grooming and mentally in knowledge the skill.

- \* The job demands that you need no repetition of an instruction that you need no follow-up, that you cope with the unexpected well and pleasantly.

The job therefore demands that you be alert and intelligent.

- \* The job demands that you get your work done on time, whether the boss is present or not, and that you get your boss to do things in time, by reminding him of his appointment, etc., that you so do your work that he need not oversee or double check.

The job therefore demands that you be dependable.

- \* The job demands that you do not discuss any specific business information, and that you do not expose your boss to ridicule.

The job therefore demands that you be loyal and discreet.

- \* The job sometimes demands that you take the responsibility for the work of assistants, to whom you assign work, handle personnel problems and lead a little team.

The job therefore may demand that you develop supervisory abilities.

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### Developing a Secretary Personality

The job demands suggest that technical proficiency is hardly sufficient for success as a secretary.

Personality development is a must. And how do we develop a desirable personality? Before we see how, we should realise that a desirable personality is a matter of being, not only of knowing.

Whatever the personality trait, there are three broad rules of action for acquiring it. And they are:

- \* Be alert for the chance to practise the trait
- \* The more opportunity you have, the greater is the likelihood of correct practice
- \* In order to develop the important trait of getting along with people, for example, you must seek to be with people.

### Practise the Trait

- \* Repetition is the major way to make a trait habitual
- \* That makes your response almost automatic
- \* Courteous responses like 'Good Morning', 'Thank You', 'Please', should be automatic.

Allow to Exceptions

- \* It is only repetition of the correct habit that can strengthen a habit.
- \* If you are a little indifferent and allow an exception, you tend to strengthen the wrong habit instead of the right one.

You can easily apply three rules of action to all the traits that make up a desirable personality in business.

It takes time and effort to acquire a trait, but it is rewarding, both in the long and short run, for you and the job.

Let us quickly summarise the major personality trait.

Businesslike Appearance

- \* Posture
- \* Personal Cleanliness
- \* Personal Neatness
- \* Good Taste in Dress.

Good Health

- \* Physical Exercise
- \* Balanced Diet
- \* Adequate Rest
- \* Resistance to Disease
- \* Abundant Energy
- \* Freedom from Nervousness

Desirable Speech Habits

- \* Tone of voice
- \* Dict. on
- \* Expression
- \* Vocabulary

Businesslike Attitude

- |                      |                                 |
|----------------------|---------------------------------|
| * Alertness          | * Sportsmanship                 |
| * Ambition           | * Sympathy                      |
| * Attention          | * Tact                          |
| * Confidence         | * Tolerance                     |
| * Co-operation       | * Willingness                   |
| * Courtesy           | Ability (Technical Proficiency) |
| * Enthusiasm         | * Accuracy                      |
| * Flexibility        | * Adaptability                  |
| * Honesty            | * Concentration                 |
| * Industry           | * Discretion                    |
| * Interest           | * Efficiency                    |
| * Loyalty            | * Imagination                   |
| * Orderliness        | * Improvisation                 |
| * Patience           | * Initiative                    |
| * Punctuality        | * Intelligence                  |
| * Self-possession    | * Judgement                     |
| * Sense of humour    | * Leadership                    |
| * Memory             |                                 |
| * Organising ability |                                 |
| * Originality        |                                 |
| * Speed              |                                 |
| * Thoroughness       |                                 |
| * Versatility        |                                 |

A word or two on some of the traits:

Freedom from Nervousness

One way is to participate in group activities of all kinds.

### Vocabulary

Being with people who speak well, listening to good radio programme, attending lectures, and reading good books and magazines are some of the ways by which you can acquire a broad vocabulary.

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### Businesslike Attitude

A pleasing personality is consistent with a businesslike attitude. This becomes obvious when we see some of the elements of the business attitude.

To highlight a few: One is a uniform tendency to take an interest in other people and in things that interest other people and a tolerance for the other person's opinion.

Another is to desist from acts of dishonesty. For example: lying, stealing, cheating, evasions, telling only a part of the truth, not admitting one's faults or errors, 'passing the buck', appropriating credit due to another, using office time and supplies for one's personal needs.

A third is to be loyal to organisation. The absence of it is shown by:

- \* magnifying petty irritations and minor injustices,
- \* gossiping about office affairs and criticising the firm or its officers to outsiders,
- \* withholding essential information from superiors,
- \* spreading out the work so that there will be less to do in a day,
- \* refusing to cooperate with superiors and fellow workers.

A fourth is uniform, genuine, consistent courtesy.

A fifth is adaptability. One who expects standard conditions at all times and all places has hardly the business attitude. Business actually calls for the preservation of a certain balance and cheer at all times,

Initiative can be a sixth. Doing things that need to be done without being told: this is an attitude calling for sustained interest and stamina.

'Finitiative' is a related attitude. It is the quality of taking things to the logical end, of not crying halt at the tiniest obstacle, of not feeling happy with a cosy explanation.

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### Technical Proficiency

Technical proficiency is the skill to do work in a superior manner. And what are some of the elements of this skill?

Let us consider two here:

One is thoroughness.

- \* This in turn means accuracy, exactness and dependability.
- \* This calls for care on the one hand and orderliness on the other.
- \* This also calls for seeing it through.

Another is improvisation.

- \* In today's India, where things cannot be had at the pressing of a button, this is particularly important
- \* We have to try new approaches
- \* We have to make do with what we have--we have to improvise.

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### Special Demands

There are some special demands peculiar to the secretary's job. In many ways you are your boss' agent. You are his agent in that you represent him in dealings with third persons.

This aspect of the job demands that you act with the utmost care and absolute integrity.

This means, for example, that

- \* You may not disclose your employer's trade secrets during or after your period of employment. A list of customers that your employer has carefully cultivated through the years is an example of a trade secret.
- \* You cannot, without your employer's consent, engage in a competitive business.
- \* You must follow your employer's instructions in letter and spirit in performing routine duties.
- \* You cannot exceed the boundaries of your authority. This will greatly lessen, for example, the chances of entering into an unwanted, and yet binding, agreement with a third party.

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### Do You Know Your Boss?

You and the boss are a team. You share his responsibilities and pressures. You can't perform your tasks adequately unless you have a good understanding of his job responsibilities.

Learning about your boss's responsibilities and professional interests enables you to work closely with him in many ways. The more you understand about his work the more he will come to depend on you and the more responsibility he will give to you.

All this saves him a great deal of time and energy so you can be sure that he will appreciate it. You in turn will learn to appreciate your boss and to take pride in being his secretary.

A working knowledge of what the boss' does and how the firm operates enables you to recognise and handle discreetly confidential matters.

It also helps you to keep yourself informed on all matters that concern the boss' work. You can, for example, scan periodicals on his behalf.

While it is good to learn as much as possible about your boss' responsibilities, you will have to wait until you are asked to assume some of them. You have to abide by his preferences.

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### What Do You Know of Your Boss?

You should know him well as an individual. Since you are working with him closely all day--with the man, his problems, his failures and successes--over a period you do come to know your boss.

It is, however, a worthwhile exercise even for a seasoned secretary to sit down and give this aspect some conscious thought.

Periodically, with paper and pencil, you sit down and spell out:

- \* What are my boss's preferences? These preferences may range all the way from mundane items, like coffee without sugar, to delicate items, like giving out certain confidential information to a colleague when requested.
- \* Do I cater to them?
- \* Are there uncertain areas? For example, are there any other executives whose work I am expected to do without questioning?
- \* When shall I take this list and check it with the boss?

So many little things--idiosyncrasies if you wish to call them--which look petty on paper, are extremely important to his mental and emotional balance. Do it the boss's way. Save him from petty annoyances.

Again, you can watch out for opportunities to pitch in to lighten his burden. He too is human; he has his difficulties with people--his seniors, colleagues, customers and children. Timely acts, however, tiny, help keep up his morale and efficiency.

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#### Some Difficult Moments

Just as you are closing for the day your boss may bark: 'You expect me to trace this paper, lying here for the past two weeks, and deliver it to the party'?

Or one 'fine' morning he may be particularly irritable and for just no reason.

Probably there is a just reason.

And the 'Just' reason is that your boss too is a human being; he may have problems at time or with his work that have nothing to do with you; he is just 'letting off steam' and you happen to be the person nearest at hand and so you feel the heat.

The lost sale, the impatient client, the drop in profit: all these will make the boss upset, tense, jumpy.

So, often he takes out his ill-humour on you. Not because he is annoyed with you but because you are the nearest person at the moment.

What do you do about it? Cry? No, you just don't take it personally. He is commenting on the situation, not on you, and you can stay calm.

Even if he comments adversely on the job, don't take it as a comment on you, your education, looks or upbringing; it is just on that particular job, no more no less.

If you have given cause for comment, however, you can quickly apologize and then get busy and improve your technique of work.

It is possible he is short-tempered or impatient but, has he not his bright side too? Why not adjust to his little whims and idiosyncrasies, say yes, without tension and resentment, and graciously?

Must you always be the one to adjust? Yes, of course; that is your role.

### Does the Boss Know You?

You are a member of the team--may not be a primary member--but a member; and your boss should know you well.

When opportunities come, you should let him know enough about your background for him to understand you, to utilise your special knowledge and talents, and to make such adjustments as he can, and as the circumstances permit, to your personality, to your personal circumstances.

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### More Difficult Moments

Like life itself your job is challenging at times and dull at other times.

But you can't have the challenging part alone--either you have life as a whole or not at all.

Your job involves a lot of routine tasks, probably some are quite uninteresting.

How do you feel about routine tasks? How is your attitude towards routine task expressed? Do you express cheerful willingness to undertake any assignment given to you?

If your boss asks you to drop everything and count all the Banerjees in the Calcutta directory do you say: 'I'll do it right away' and smile while saying it--and doing it?

Routine chores, monotonous operations, are part of the game. If you let them overpower you, your secretary personality will suffer.

Here are some ways to reduce the rigour, but there is no substitute for doing it with a smile:

- \* Try to vary the sequence in which you do your work.
- \* Compete against yourself
- \* Search out time and work saving methods; this is not laziness--it is efficiency. The quicker and more efficiently you accomplish any of the tasks assigned to you the better your chances of being marked for promotion become
- \* Use check lists. A few samples are on the next pages.

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### Check List for a Tour

### Check List 1

1. Tour Programme
2. Air ticket
3. Cash
4. Cheque Book
5. Personal Diary
6. Pens & Pencils
7. Folder containing:
  - a) Inland letters
  - b) Letter-heads-officials
  - c) Envelopes--officials
  - d) Plain paper
8. Personal letter-heads and envelopes
9. Points for discussion
10. Company's Annual Report--latest
11. Company's business leaflets on new products



Check List for a Conference/Meeting

Check List 2

1. Confirmation of the receipt of information of the meeting by the members.
2. Reception of the members at the place (if restrictions of entrance, names of the members to be given to the Security Office)
3. Seating arrangements, Black Board
4. Agenda, pads and pencils
5. Minutes, recording
6. Refreshments
7. Transport for the members
8. Departure bookings
9. To be 'seen off'

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Check List for 'Visitors'

Check List 3

1. Is he to be picked up; by whom, at what time, when and from where
2. Arrangement with the Security for admission and guide
3. Should the other departmental personnel know of this visit?
4. Any special file/details to be made available for discussions
5. A 'Visitor Book' to be produced for his signature
6. Any memento to be presented
7. Any special arrangement for refreshments
8. Any photographer required
9. Chauffeur of the visitor should also get refreshments

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Business Etiquette

The rules of business etiquette are ordinary principles of good manners. A few minutes spent in familiarizing yourself with these rules can spare you many anxious and embarrassing moments in the office.

Listen to the way other people in the office address each other and follow suit. The safest policy is to address them as "Mr. Rao", 'Miss D'Sa8. If you are invited to address the person by his first name you may do so, of course.

It is more businesslike and makes a better impression on visitors if you say 'Mr ..... ' will be with you in a moment instead of 'He will be right out'. 'The boss says' or 'FGS tole me' are disrespectful. Of course, you never use your boss's surname by itself--as for example--'Gupta wants to know.'

Other executives in the company also deserve courtesy and respect. Greet them pleasantly.

One of the greatest breaches of courtesy is the interruption of a superior by a subordinate who feels his work is so urgent that it cannot wait until the superior is free. If your work needs the opinion of a superior wait until he is through talking with someone else before you enter his office, even though the door may be open.

The exception to this rule is when the discussion seems to go on without an end.

Wait outside the office if the person you have come to see is talking on the telephone.

You must respect the rules and regulations of the other departments.

It is poor office etiquette to bypass the superior whose job it is to assign work and to bring it to his subordinate.

Respecting the rights of others is not only good manners; it is also a practical way of ensuring that work is accomplished efficiently. When you approach the wrong person, you are creating bad feeling as well as delaying completion of the work.

Phrase your remarks politely. If you show consideration for others, they will be glad to do the same for you.

### Secretary as a Receptionist

From time to time you have to play the receptionist. You create the first impression for your boss and this has to be one of good etiquette, courtesy and a desire to serve.

#### Here are some guidelines:

- \* Know and practise the degree of formality that the company wishes to maintain.
- \* Use 'Sir' rather than 'MR.' in all instances.
- \* Keep the office and reception room neat, fresh and attractive at all times.
- \* Be tactful, friendly, and cheerful. It is courteous to discuss Mr. Rao's interests with him, but the discussion should be approached from his point of view.
- \* Never offend callers by thoughtless, careless remarks concerning themselves, their families, their companies, or their products.
- \* Extend cheerful courtesy to everyone.
- \* Avoid being overfriendly with customers, clients, and salesmen.
- \* Maintain a sense of humour. Be able to see the amusing side of a situation to laugh off moments of anger and tension.
- \* If for security reasons, admission restrictions are present, arrange for courtesy reception and guide at the gates.
- \* If the way to your boss's office is complicated, you would do well to post a guide to receive and bring him to your office or the Visitors' lounge.

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### Your Personal Appearance

Your personal appearance is of even greater importance in the business world than it is in your private life. Your appearance no longer reflects upon you alone; it also reflects on your boss and on your company. You have a responsible position and you must dress for the part. Be a well-groomed secretary.

Here are a few hints for the lady secretary:

- \* Wear attractive but conservative clothes.
- \* Keep clothing clean, well-pressed, and free of perspiration odours.
- \* Wear a minimum of jewellery and avoid anything that rattles and jingles, or is likely to get in the way of your work.
- \* Take proper care of hair, nails, skin, and personal daintiness.
- \* Apply cosmetics properly and with discretion.
- \* Ensure a smart, decent, and elegant appearance.

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### Your Personal Behaviour

You can ruin the whole impression created by appropriate clothes and careful grooming by careless personal behaviour.

The following are inappropriate in personal behaviour:

- \* Loud talking or loud laughing, in the office or in the corridors.
- \* Using unbecoming language.
- \* Taking a lengthy tea-break or lunch hour.
- \* Sitting on desks.
- \* Smoking in someone else's office.
- \* Undue familiarity with superiors.
- \* Officiousness.
- \* Discourtesy.
- \* Insolent tone of voice.
- \* Chewing gum.
- \* Nail biting.
- \* Arrogant behaviour.
- \* Inability to admit mistakes.
- \* Living beyond one's means and borrowing from colleagues.

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### The Mail

Remember, a good part of any business is carried on by correspondence; the mail is the lifeblood of business.

#### Opening and Sorting the Mail

Preparing the incoming mail so that your boss can read it quickly and act upon it at once can save hours of his time each week. Give your immediate attention to incoming correspondence.

#### Pre-sorting

Pre-sort the mail into categories like:

- |                      |             |
|----------------------|-------------|
| * Correspondence     | * Immediate |
| * Book-post material | * Priority  |
| * Inter-office mail  | * Ordinary  |

#### Opening Correspondence

- \* Open first those envelopes which contain correspondence.
- \* Check carefully to be sure you have removed the enclosures.
- \* Clip enclosures to the correspondence.
- \* Be sure the correspondence contains the return address and signature.
- \* If it does not, attach the envelope to the letter.
- \* Date stamp the letters.
- \* Write the postmark date on any letter that is not dated.

- \* Put the envelopes to one side, until you have completed processing the mail.
- \* Do not open mail marked 'Personal' and 'confidential' unless you have been given the authority to do so. It is courteous to err on the side of caution.

Sorting the Correspondence

These are the various categories you may find in each morning's mail delivery:

- \* Letters marked PERSONAL
- \* Requests for appointment
- \* Requests for information
- \* Requests for merchandise
- \* Answers to previous correspondence
- \* Technical papers and data about your boss' hobby
- \* Advertisements
- \* Requests for donations
- \* Papers and periodicals.

Sort the letters into three piles:

- \* those your boss must handle,
- \* those that require attention from someone else in the office (e.g., advertisement-literature for purchase department).
- \* those that require your attention.

While you read the letters, keep the following in mind:

- \* Is there any previous correspondence which will help the boss handle this letter? If so, attach the file.
- \* Is any other information like certain figures required to answer some letters? If so obtain them.
- \* Make shorthand notes of the matter (on the margin) as you read through the mail.
- \* If the boss permits, you can mark the important parts of a letter to enable him glance through it quickly.
- \* Has some enclosure, mentioned in the letter, been omitted? If omitted, write to the company about the non-receipt of the enclosure.
- \* Should the letter be referred to someone else, route it to the appropriate person.
- \* Does the letter mention something being sent under separate cover? If so, make a notation on the 'Mail expected record', as follows:

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Name of Co. or Person & Date	Material Expected	Date Received
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Further categories your letters as follows:

- \* Letters asking for appointment, setting up meetings or advising of future engagements. If you are allowed to take decisions in regard to these matters, use your appointment book immediately and keep a separate memo to present to your boss.
- \* Letters which may be immediately filed.
- \* Technical papers concerning the business or the boss's hobby.
- \* Advertisements, appeals, and periodicals.

Note the date and time of any appointments or meetings mentioned in the letters so that you can keep track of them later. Also note in your follow-up system and deadlines for replies, reports, renewals, or the like, so that you can remind your boss. Read each letter and as you do so make a notation on it as to where it will be filed.

#### Submitting the Mail to Boss

Preferably, you should take the papers personally to him so that you can provide clarifications where necessary and so that you can take instructions for disposal.

If your boss's preference is otherwise, place the incoming mail on his table before he arrives in the morning. If other people have access to his office, the mail should be in a folder or face downwards. Keep the mail in the order of importance, and place the mail in the same place each day.

Ask your boss whether he wants you to present the mail to him after each delivery or hold it until designated times during the day. In the latter case, you have to make an exception for express delivery or urgent matters.

Keep those letters and circulars that might interest your boss. Route the others to whichever department might find them useful and throw away any that remain.

#### Newspapers and Periodicals

Put the periodicals and newspapers your boss wants to see in a folder and put it on his desk. Keep the others in your reference library.

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#### Tips on Taking Dictation

You know-how to take dictation in shorthand and how to transcribe. These two operations take a fair bit of your time. Since time is your major problem, you may welcome every little time-saver. Here are a few:

- \* Know your outlines thoroughly and practise them enough to see them with facility. You lose time struggling to read inaccurate or poorly-made outlines.
- \* Keep the manual, a shorthand dictionary, and a phrase book in your desk.
- \* Go through your manual once a month to refresh your knowledge.
- \* Your dictation will be easier if you make a list of the technical and other words peculiar to the trade.

- \* You can also form standard outlines for words and phrases often used and spoken fast.
- \* Write the date in coloured pencil at the top of the next blank page each morning.
- \* You also save time by keeping related correspondence papers.
- \* Another obvious method is to answer the letters yourself wherever possible. In fact, the boss should never be compelled to dictate a letter which a secretary can answer.

#### Be prepared at All Times

- \* Keep your notebook on your desk with sharpened pencils beside it.
- \* Be ready to respond instantly when your boss presses the buzzer for you.
- \* When you take dictation sit facing your boss. It helps hearing and understanding.
- \* Be and look alert; interested; don't take notes like an automaton.

#### Organise Your Note Book

- \* Cross out each page of shorthand notes as you transcribe it.
- \* Keep all the completed pages behind a rubber band so that they will be out of the way when you take new dictation.
- \* Take telegrams or rush letters on a clean page of your note book. After taking the telegram, fold that page diagonally so that the edge will protrude out of the notebook.
- \* Be sure you know the number of carbon copies required and to whom they are going. Write the number extra carbon copies at the beginning of the dictation and circle the number.
- \* Punctuate and mark paragraphs in the dictation as you take down your notes.
- \* Circle any references to enclosures.

Develop speed by using techniques like the following:

- \* Draw two short lines at the end of a letter to separate it from the next letter. This helps in estimating the length of a letter at the time you make the transcription.
- \* Check names or figures at the time they come up in the course or dictation. Write names out in long hand so that you will not forget the spelling, and circle the figures so that you do not confuse them with shorthand symbols.
- \* During 'the pauses-for-thinking' that the boss takes when he is dictating, you can check back over previous sentences, mark words that don't make sense to you, correct outlines that are inaccurate.
- \* If you are not getting what your boss is dictating, do not hesitate to ask him to repeat.

But don't interrupt--wait until the end of letter. Your interruption may break that train of thought. Do so at the end of the letter. The boss will thank you for checking with him immediately the spelling and address. Avoid retyping the letter and the possible misinformation.

And enquire respectfully and graciously. Don't ask, for example, 'What?', 'What did you say?', 'Beg pardon?' etc. Instead, say:

'That name is new to me'. 'Where will I find Mr. Rao's title?' or 'Would you mind repeating that sentence, the context is not clear to me?'

The art of wording a question is of prime importance; it is one of the ways in which you express your personality. 'You take cream in your coffee, do you not?' is more cordial than 'Do you take cream in your coffee?'

Minutes and Reports of Formal Meetings

Knowledge of Parliamentary Procedure

Business must be transacted exactly according to law, or else opposing factions may try to invalidate much of the work accomplished.

The kinds of meetings are:

- annual stockholders' meetings
- special stockholders' meetings
- regular meetings of directors
- special meetings of directors

In order of business to be followed in a committee meeting is usually outlined in the by-laws. In order to gain some idea of what any meeting of this type is like, you can read the general rules on procedure for a directors' meeting.

#### Method of Reporting Meetings:

This knowledge may often be gleaned by reading over old minutes of the organisation.

You can do a professional job if you follow these suggestions:

- \* Be prepared each time a new topic is introduced to record the name of the person who introduced it, the main points covered, and the general comment. You must be constantly alert.
- \* It is not necessary to take everything down word for word but it is important to take copious notes. You can always cut out any unimportant material at the time you type the minutes.
- \* Do take down every word of resolutions, amendments, decisions, and conclusions. Sometimes resolutions are framed before the meeting and in that case you can just write a word or two to identify the resolution and copy it exactly at the time you type the minutes.
- \* Take important statements word for word.
- \* The words of anyone who asks that his views be made part of the record should also be taken verbatim.
- \* Be sure to get the name of each person who proposes any action, opinion, or plan, or makes any important statements.
- \* Mark your note with a large, easily seen symbol (asterisk, capital letter, or anything else) whenever any items come up on which action is to be taken immediately after the meeting, or on which your boss is responsible for future action. This marking will help you to pick out these important sections if the executive wants to refer to them before the minutes are formally typed.

- \* Some formal meetings will have a prepared agenda. If the items of business are pre-arranged, you can draw up a preliminary rough draft of what the minutes are expected to be, filling in discussion and developments as they actually occur at the meeting.
- \* If you know in advance what resolutions are going to be proposed, make a record of those resolutions and assign a number to each one. Then, while taking notes, refer to them only by number.

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### Tips on Accurate Transcription

Organise materials before you begin. These are little things. As little things go, they assume undue proportions when ignored:

- \* Keep the typewriter clean and well-aligned. Keep it covered when you leave the office. Get it serviced once a month. Change the ribbon in the typewriter before the type starts to look faded.
- \* Keep your notebook close to the pile of letters to which you are replying. You will need to refer constantly to both.
- \* Set up your stationery drawer so that you can grasp the letterhead, second copy page, and carbon copy pages by the top edges and pull them all out with one motion. Keep it well-stocked and re-order in time.
- \* Keep your envelopes with the back facing front and the top edge down.
- \* Tie your eraser to your typewriter with a cord long enough to easily reach the farthest point of the carriage when the carriage is pulled to the extreme left or right.
- \* Be careful with finished work. Place finished dictation in an open drawer where it will be safe and clean. Keep the letters face down and away from prying eyes.

### While transcribing:-

- \* Do transcription promptly.
- \* Transcribe 'rush' items first.
- \* Read through notes once. Immediate reading of notes helps to check hazy outline, and to check with the boss before he forgets.
- \* Keep reading a sentence ahead of what you type, so that the context will help you.
- \* As you finish transcribing each letter, draw an oblique line from the upper left-hand corner to the lower right-hand corner.
- \* Check dates, names, addresses, and numbers. Give needed care to the spelling and initials of addresses. Double check before you transcribe. There are some who know that they can demand the selling price.
- \* When you start typing the letter, you should estimate its size so that there can be balance in the letter.
- \* Make sure your letters are neat and elegant in appearance. White margins are pointless if they are filled with signs of carelessness. Keep hands spotlessly clean and handle work carefully.  
Make an attractive 'set-up'. Aim at an even touch and accuracy. Avoid overtyping.
- \* Avoid erasures and if you must, do it well and with special erasers. It is seldom safe to erase long words or portions of lines; almost invariably the erasure will show. If the correction shows at all, type the letter over.



- \* Handle carbon paper gently, avoiding folds and creases. Replace carbon sheets in their box. Turn the carbon paper end for end after each letter.
- \* Take special care with spelling and grammar. Keep a reference book in which to check for the correct grammatical usage. Keep a dictionary close at hand. Use it whenever there is the slightest doubt in your mind. It is not a weakness to admit the need to refer to a dictionary.
- \* Read the letter over yourself. Once the letter is on paper, it is always wise to read it over for possible typographical errors of commission and omission.
- \* Adopt uniform procedure.
  - a) for a D.O.
  - b) Official letters.

When you are interrupted during transcription, mark your place with a pencil check mark. This simple step saves a lot of time which otherwise may be lost in re-reading notes when you are ready to resume work. Merely begin where you stopped, at the check mark.

Don't leave a partly typed letter in the machine while you are out of the room.

Follow the meaning at the time you are making the transcription.

#### Submitting Letters for Signature

Learn at what time of the day the boss wants to sign his mail and present all the letters you have typed during the day for his signature at that time.

Present the letters, with the envelope and enclosures attached to each one, in a clean folder.

#### Editing Dictation

The boss may be intent on replying to correspondence that he becomes a little careless about correct usage, grammar, or punctuation in his dictation. You are expected to correct minor errors, but there are some things which you should not change without his permission.

You may change incorrect punctuation, grammatical constructions that are definitely wrong, incorrect spellings, and page numbers or catalogue references that you know are wrong.

But you shouldn't change figures.

You should not change expressions and phrases that are characteristic of your boss.

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#### Letters You Write

Whenever possible, you should write letters yourself.

As you grow in the job, the need to dictate on the part of your boss should be less and less.

The letters you write may be signed either by yourself or by your boss.

You may write a letter--

- \* to make a hotel reservation
- \* to make a plane reservation
- \* to acknowledge mail in your boss's absence
- \* to obtain an enclosure not sent
- \* to correct an error in account
- \* to handle a request for an appointment
- \* to request an appointment
- \* to follow up an order
- \* to extend an invitation
- \* to reply to an invitation
- \* to express congratulations, appreciation, sympathy and regret.

Some of these may be repeat situations. You should therefore keep a loose-leaf file of standard letters. The advantages are obvious:

- \* You have a well-drafted letter wherein you only need fill in the details.
- \* Using your earlier experience your letter will carry all the information it need to.
- \* You can get the job done by a junior.

By way of illustration:

Situation: Acknowledging mail in the boss's absence.

Dear Mr.....

For the past few days Mr. B..... has been confined to bed because of typhoid and he is not expected back at his desk until the first of next month. Your letter of ..... will be handed to him immediately after his return.

Very truly yours,  
Secy. to Mr. B.....

Notes: The reply states--

- \* that the boss is ill
- \* when he is expected to return to work, and
- \* when the letter will be handed to him.

In each type of letter, all the pertinent facts should be included--as for example in a letter asking for a hotel reservation.

Repeat situations lending themselves for standard letters are also possible when you write letters for the boss's signature. For example,

- \* accepting an invitation
- \* declining an invitation
- \* sending an invitation

- \* apologising for being absent
- \* apologising for delay
- \* thanking someone for a favour
- \* congratulating someone
- \* condoling with someone
- \* offering sympathy
- \* asking for information

One way to do it is to go through the boss's personal correspondence files.

The letters will be more in the nature of guide letters since the situations constantly vary. The value lies in saving precious time.

When a safe and complete form has been used for one letter, future correspondence may be modelled on that pattern.

In respect of social letters particularly, a prompt reply is essential. It may be just regretting inability to attend a function but it should be attended to promptly. Guide letters make it possible.

Also, your boss should not overlook an opportunity to recognise the joys and achievements of others or show sympathy at their sorrows--friends, acquaintances and even strangers. On the basis of news items, grape-vines, etc., your letters should go out and in time.

Whenever you write a letter for your boss's signature, you have to remember two points:

One is style. You have to follow his style. The letters must sound like your boss's. If his letters are brisk, write in that direct fashion. If he writes a literacy style, try to use that style yourself.

The other is the salutation and the close. Your boss may address one by the surname, another by the first name and a third by the pet name. To write letters like the boss does take time but the sooner a start is made the better.

Whether you write for your or your boss's signature, the following are writing guidelines:

- \* Be natural; write as you speak. Don't use fancy words.
- \* Use the active voice. Use short, clear, and direct sentences.
- \* Use the positive approach. Emphasize the positive aspects of the situation you are writing about even if what you have to tell the person is negative. Start off with how much you would like to help him.
- \* Phrase your sentences around the word 'you' instead of around the word 'we'.
- \* Use a tone of deference and respect.
- \* Never use slang or jargon.
- \* Never use 'red flag' words-- words like mistake, failure, childish, superficial, extravagant, premature, careless, to which most people react negatively.
- \* Be friendly. Make your letter reflect a cheerful attitude and a co-operative spirit.

### Outgoing Mail

In respect of outgoing mail, ensure that

- \* the signature is there
- \* all enclosures are included
- \* the inside address corresponds with that on the envelope.

Be sure that each letter is neatly folded and supplied with sufficient postage. If the contents are valuable or confidential, see that the letter is securely sealed.

### Items Accompanying Correspondence

Enclosures are better stapled to the letter than clipped on. If the enclosure is heavy, it is better to send it in a separate package, preferably accompanied by a copy of the letter. Things promised 'by separate cover' should go the same day. Write the return address on the package unless it is printed on the label.

### Addressing Envelopes

In typing addresses, correctness is essential. An incorrectly typed name creates difficulty in delivery and offends the person receiving it.

Enclose a self-addressed postcard in a letter when you want a brief return message which is not confidential.

### Mailing Lists and Address Books

Keep an indexed address book, if possible with telephone numbers, or keep a card index.

Keep the mailing list up-to-date.

To change your own address on any mailing list, tear the stencilled address from the wrapper and return it to the company with the new address correctly typed below the old one.

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### Matters Postal

Probably you have with you a copy of the latest postal guide. Even so, you may find the following information of value:

#### Express Delivery Letters

- \* Ordinary letters often serve the purpose better, particularly in big cities.
- \* Sending express delivery letters to offices on Fridays may not serve any purposes.
- \* Express delivery letters addressed to post box numbers are not generally delivered by messenger.

#### Telegrams

- \* Provided there is someone responsible at the receiving end, giving the telephone of the addressee helps.

- \* If the addressee has a telegraphic code address, it is well to use it.
- \* Postal District number is not charged. Therefore, it is good to mention it--say Bombay (22)
- \* Make a carbon copy and post it by ordinary post with additional notes, if any;
- \* Spell out numerals.

#### Cables

- \* Use the cable address if the addressee has one
- \* Write in capitals or type
- \* There are two rates--LT and F.R. For LT the minimum number of words is 22 and the rates are about half of the full rate (FR). A minimum of five words applies in the case of FR.

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#### When the Boss is Away

Always follow your boss's personal preferences.

- \* Your boss may telephone the office every day to check on what has happened. Be prepared for his call by writing the gist of each letter--a phrase such as 'wants prices; will do'--at the top so that you can tell him about the letter without reading it through again. Jot down his instruction on the letter itself.
- \* Telephone or telegraph him about anything urgent that requires his immediate personal attention, if he does not call you.
- \* Acknowledge every letter that comes into the office, personal or business, if he is to be away for more than a few days.
- \* Try to dispose of as much mail as possible by taking care of the subject in your acknowledgement or by referring the letter to someone else in the company for reply.
- \* Make a copy of any mail that requires your boss's personal attention and forward the copies to him.
- \* If you are to forward mail to him, let him know before he leaves that you will number each packet of mail consecutively. Mark the number on the envelope.
- \* What should you do if your boss is on vacation and has told you not to forward any mail? In that case, keep the letters that require his personal attention and in your acknowledgement indicate when the writer might expect a reply.
- \* Keep the accumulated mail in folders as:

- 'correspondence to be signed'
- 'correspondence requiring your attention'
- 'correspondence to read' (letters that have been answered but in which he will probably be interested).
- 'Reports', and
- 'General reading material' miscellaneous items like publications that he may want to read).

- \* Prefer staples to pins clips to fasten enclosures.

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## Filing

No matter how excellent a secretary you may be, your boss will be impatient and curt, and entirely forgetful of your manifold good qualities, if you cannot produce a document when he wants it.

The main purpose of a filing system is to arrange letters, record cards, bills, documents, catalogues and other commercial papers in a neat and logical order so that they may be produced when desired with the least time and effort.

Even if there is a central filing room designed to take this burden from your shoulders, there will always be executive files, confidential files and files of corporation and financial papers that are kept in private offices and departments. You are responsible for your own filing cabinets.

Papers must be arranged according to some logical classification. The alphabetical name file is the simplest and most basic filing system in use today. A subject should be sufficiently inclusive to embrace all material desired, but it should be equally exclusive in order not to include extraneous matter.

To avoid crowding your files with folders for names under which you have only two papers, insert a 'Miscellaneous' folder at the rear of each letter section and within these folders keep all the single papers arranged alphabetically. Once, two or three papers accumulate for one name and file it. Be sure, of course, that you check the 'Miscellaneous' folders periodically--papers are easily forgotten in them.

To help others, who must use your filing cabinets, find papers more easily and more rapidly, keep a card index to your files, but this should be up-to-date, to be useful.

File the papers daily--then and there. You may use a suspense folder to store letters which you are unable to file rightaway. Check the files periodically (say once a month) to see that papers have not strayed into the neighbouring files, also to transfer them to inactive files or to destroy them. To fasten papers together, staple them; do not use clips or pins.

To help filing, type the subject on the line below the salutation. Do not file before you think--even a single misstep can create a crisis of confidence. Some letters should be crossfiled under several headings.

The time spent in filing is gained in finding what you need quickly--and in retaining your boss's goodwill.

## Tickler File

This file is a chronological folder file. Papers which are to come up for action on a particular date as for example rebate payments are placed in that date folder. This is supplementary to the calendar pad where appointments, etc., are listed, where recurrent items such as insurance premium, etc., are recorded for the entire year.

## Folder File

Folders are also kept for projects or persons so that follow-up can be done systematically. This is a good follow-up tool.

### Your Desk and Your Boss's

Your desk as well as that of your boss should be clean, tidy and efficiently organised and you have to work towards that end. Come a few minutes early in the morning to prepare your boss's office for him. Take care of the plants and flowers, the pencils and the pads. Synchronise your calendars regarding appointments, etc. Type out a small index card listing the day's schedule for your boss. Ignore not little things like non-emptied ash trays.

In matters like interior decoration if budget permits, consult the professional. If time permits and the boss is conducive, you can work out a schedule yourself with study observation, and some consultation with the suppliers. A well-lit, well-ventilated and well-arranged executive room does make a difference. It can be both attractive and functional.

Occasionally a boss prefers to keep his desk in a rather unusual fashion. It is wise to let him. It is unwise to force 'tidiness' on him.

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### The Appointment Calendar

You should know who is scheduled to call on your boss, when and in what connection. Also when your boss is scheduled to call on someone. Be ready to receive the visitor promptly at the appointed hour.

Treat everyone the same--the prepossessing and the retreating, the unknown and the famed--being courteous and helpful to everyone you meet. If you have 'get-acquainted' material--pamphlets, etc., about your company--assemble them appropriate to the individual visitor and keep it ready.

Remind your boss about important and routine matters at the proper time--appointment, meetings, anniversaries and reports. You may have to remind him so that he may reach the appointed place in time. You can keep the papers and points ready for such meetings.

You will have an appointment calendar in duplicate--one on your desk and the other on the boss's. In consultation with your boss you'll keep them up-to-date. It is possible you have the boss's permission to give appointments. If you have, apart from the name, the organisation and the purpose, get the telephone number. The idea is you should be able to call back in case your boss can not make it.

If an appointment has been made far in advance, please confirm it on the day before. Allow fifteen minutes between the time you expect an appointment to end and the time the next appointment begins. Keep a 'callers' file--an indexed card.

Keep 'date book' for him wherein anniversaries, birthdays, etc., are recorded. At the beginning of each week, go over the list and get his instructions.

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### Callers on the Boss

Many a person wished to call on your boss and every person who calls at your office has a reason for doing so, a reason that seems important to him. You have to so handle him that a friend is made every time and that foe is not made

You have also to remember that one of your primary jobs is to screen callers and protect your boss from people, who may take up his time unprofitably.

The callers may be broadly divided into:

- \* Those who have regular business contacts--like salesmen.
- \* Those who come infrequently--like prospective customers.
- \* Those who have legitimate reasons--like boss's family members.
- \* Those whose reasons for coming are not quite beneficial to the business--such as fund collectors.

Here are a few guidelines for handling a caller that comes by prior appointment:

- \* Receive each caller promptly and pleasantly and introduce yourself. 'Good morning, Mr. Rao. I'm Miss Sharma, Mr. Gupta's secretary. Mr. Gupta is expecting you'.
- \* Always rise to greet a visitor.
- \* Ask for the caller's card, and if he has none available, put the necessary information down on a memo sheet.
- \* If his name is difficult to pronounce, ask him to spell it for you, and note the correct pronunciation.
- \* If the caller must wait for your boss, see that he has:
  - a) a comfortable chair
  - b) some reading material
  - c) an ash tray
  - d) sufficient light and air.

Apologise to him on behalf of your boss for the delay.

- \* Do not force conversation upon the visitor unless he seems to wish to talk. Talk about subjects in which the caller shows an interest. Strive to learn about music, drama, current events, different areas of the world, books, sports and nature. Avoid for discussion purposes your company business and his; your personal problems or your boss's; and taboos of religion or politics.

When it comes to answering questions, one can be perfectly courteous and yet refuse to answer any.

- \* Escort the visitor into the boss's office and announce him, if they, have not previously met.

In respect of people who drop in without an appointment, you should have an understanding with your boss about which people he will see at any time, which ones he may see in special circumstances, and those he will not see at all.

Your first step is to learn the purpose of the visit. Very often you will find that you can handle the matter yourself, or that it can be taken care of by someone else in the company.

You will be using some form of the following conversation many times throughout your career:

'Good morning, Mr. Rao, I am Miss Sharma, Mr. Gupta's secretary. May I help you,'

'I would like to see Mr. Gupta'.



'Mr. Gupta has been quite busy today. Do you have an appointment? I don't seem to have your name on my calendar'. (You may say this although you know perfectly well he does not have an appointment).

'No, but my business will take only a few minutes. I wanted to show him our new line of office equipment'.

'Mr. Gupta no longer handles purchasing of any kind, although he did at one time. Mr. Malhotra takes care of all purchasing now. May I call his secretary for you?

In this way you have taken care of the visitor without disturbing the boss.

Whenever you refer a visitor to someone else in the company, be sure to telephone ahead and explain the situation so that the visitor will be received properly.

#### Acting for the Boss

There is no objection to telling a caller: 'Mr. Gupta is completely tied up this morning, but I shall be glad to try to help you'. The extent to which you can assist your boss will depend upon your knowledge of the business.

Don't do what you would like to do, but do what your boss would want you to do.

#### Making a Digest of Calls

Keep a complete record of calls you have handled for your boss during the day and give him a written digest to look over. Sometimes the visitor without an appointment is someone your boss may want to see--for example, a customer who will be in your city for a few hours only.

If the boss is engaged at the moment, ask the visitor to wait, telling him how long the wait will be. If your boss has another appointment scheduled, you can tell the unexpected visitor, 'Mr. Gupta has another appointment in ten minutes, but he will be glad to see you in the meantime'.

Explain that the boss has a full schedule and assure the visitor that a visit from him at any other time would be most welcome. Smile as you would at any visitor and do not express disapproval in any way.

When your boss has said he will see absolutely no one who does not have an appointment, and a caller refuses to talk to anyone else or will not explain the reason for his visit to you, you can only suggest that he writes to the boss. Advise him to mark his letter personal and to ask for an appointment. Assure him that your boss will see the letter and that letters marked 'personal' are not opened by anyone except the boss himself.

Use such a pleasant manner in turning aside callers the boss will not see that they will not be antagonized or resentful toward either the boss or the company.

#### When Boss is Delayed:

Telephone the expected caller and let him know. Sometimes, you are unable to reach the caller before he arrives. Come out to the reception room and explain the circumstances briefly and apologetically. Tell a caller frankly when the boss will be back and make another appointment if uncertain of the time of his return.

Do not insist on the caller to wait; you can assure him of your boss's regret at his absence, but permit him to exercise his own choice easily.

### Etiquette while the Boss has a Visitor

In most cases you will not be present during the meeting between your boss and a visitor. It will be your responsibility to see that they are not interrupted needlessly. This means screening telephone calls that might come in as well as taking care of the minor office details that do not need the boss's immediate attention. Occasionally the executive will need your help to conclude an interview tactfully.

The method of writing the message rather than giving it orally should always be followed whenever there is someone in the room with your boss, even though the other person is a member of your company. It is your boss's privilege to tell others about such calls or not, as he sees fit. If the executive has a call and you are in his room do not appear to be listening to the conversation.

### Help the Executive Maintain his Appointment Schedule

Discuss with the boss the various ways in which you can help to terminate the too-long interview without showing rudeness to his guest.

### Help to Terminate a Visit

Many secretaries have an arrangement with the boss whereby he presses a concealed buzzer in a certain signal to indicate that he would like her to rescue him from a visit that is taking too long. When she hears this signal the secretary enters the office and says that it is almost time for the boss's next appointment. The visitor will no doubt take the hint and leave. There is no need for you to feel that this action is dishonest on your part. Your boss owes it to his other customers and to his company to save the company's time.

If you and your boss do not have some method of signalling, he may want you to come in, nevertheless, when a second customer or visitor arrives on time for his appointment while the previous visitor is still in the office. Type this message or something like it on a slip of paper. 'Mr. Diaz is here for his 3 o'clock appointment'. This procedure then allows your boss to make the decision as to whether or not he wishes to terminate the meeting or continue and allow Mr. Diaz to wait a few minutes.

The unexpected visitor steals even more time from your boss's day, than the appointment that drags on too long. Although your boss may agree to see someone who has dropped in unexpectedly, he may want to limit the length of the caller's stay in order to save time for himself and in fairness to others who have definite appointments.

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### Your Relations with Others

As a secretary you have to relay your boss's instructions to the people in the department and bring their comments back to him. You may have to speak with people in other departments to urge them to send, for example, your boss's reports promptly so his work will not be delayed. You will have to speak on the phone to people in other companies. You will have to receive visitors, 'who drop in for a courtesy call'.

Your skill in handling people will be tested a hundred times a day. You have to get along with people.... all people.

For internal purposes the following guidelines may help:

- \* Find out your exact relationship to the other people in the office.
  - a) Am I in charge, or is it some other employee in the department, and if so, which one?

- b) Is it permissible for me to request assistance from some other employee or employees?
  - c) Am I expected to help other members of the staff, or am I supposed to reserve my time for my own boss?
  - d) Am I, as an individual or as a part of the group, accountable to any executives other than my immediate superior?
  - e) Am I supposed to show interest in work done by others in the department, or must I tend strictly to my own niche in the business?
- \* Know the rules that regulate the office, and follow them to the letter. Office rules and protocol are personally interpreted by each boss and each office.
  - \* You occupy a privileged position, enviable in certain ways. You are close to the boss and you are your own supervisor. It becomes all the more necessary that you exercise self-discipline.
  - \* Do not use your working time to attend to personal affairs, make a personal telephone calls or write personal letters.
  - \* Make an effort to be at your desk well before starting time particularly when your boss is away; and avoid rushing off immediately at closing time.
  - \* Do not take more time than that allotted to you for lunch.
  - \* Refuse to listen to or repeat office gossip, scandal, and rumour.
  - \* Avoid time-wasting chit-chat that has no part in the affairs of the business.
  - \* If we accept our salary, we are legally and morally bound to perform the implied duties in the contract--namely X hours of work per day for Y number of days per week, in order to receive Z as salary.
  - \* Avoid long discussions of personal health problems.
  - \* Limit personal phone calls to emergencies and absolute necessities. Even then, try to keep them to a three-minute deadline.

These are minor details, but they are significant. They are an expression of your loyalty to your company and to your boss.

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#### Making Life A Little Easy for Both

Executive life is a life of pressure, a life of exacting demands on one's time and talent. In many little ways, the secretary can save for the boss many ounces of energy and several minutes of time--and for himself/herself too,

Here are a suggestive few:

- \* Schedule your own daily work. Allow time, however, for interruptions. Keep your plan flexible. The idea is to have a pattern set up so that you can work within its general outline.
- \* Help schedule your boss's day, in so far as he permits it.
- \* Create an atmosphere of smooth operation by using available time wisely and avoiding any appearance of haste. Schedule appointments from maximum efficiency and ease. Leave a fifteen-minute time lag between each appointment.
- \* Help the boss increase his working time by holding off things which may be eventually delayed a day or so, or by doing them yourself.
- \* Answer routine correspondence which does not need his decision or signature.
- \* Order office supplies. Keep a check on his personal gift list. You are expected to remind the boss of the small jobs.

- \* Listen to and obey the boss and that too pleasantly--if you anticipate difficulties, bring them up later.
- \* Arrive a few minutes before the official opening time and limit the lunch hours.
- \* When lunch time comes around: The luncheon hour is your own. You can always slip in a word to your boss before you leave by saying: 'Is there anything more you want before I go?' This courtesy is equally necessary when you leave the office in the evening.
- \* Boss's lunch hour: If your boss cannot get out for lunch, thoughtfully have lunch sent in for him. Eat a hearty breakfast so you can stand an occasional postponing of lunch.
- \* Keeping up with the news: All awareness of what's going on in the world will add to your fund of general information. If you see anything in the news that might interest your boss, mark it or, better still, clip it, write the date on it, and place it on his desk. Refer to the index for getting information swiftly.
- \* Securing information or data: You will have to know where to find material and data. Know the information sources in the city--Keep the telephone number and, where possible, the name of the person in charge. When you are given instructions which are to be relayed to another, write them out for the individual concerned. Take the responsibility of carrying a matter through.

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### The Business Trip

Business travel is now the rule, not the exception. Not merely internal travel but travel abroad. Travel is not merely frequent but at short notice. The secretary can assist the boss materially and here are a few pointers:

#### Travel Formalities

- \* Work in association with a businesslike firm of travel agents.
- \* Know the range of services they can provide you.
- \* Talk over with the boss regarding flight, hotel and other preferences. To the extent conditions permit, you should get him the facilities he seeks. You want him to feel so comfortable that he will be fresh and fit to do his work. (if the boss travels frequently he may even name the room he prefers in a particular hotel).
- \* Prepare an up-to-date time-table for your reference.
- \* You may communicate requirements by phone but do send a written request.
- \* Follow-up the travel agent regarding travel arrangements. Do not take chances.
- \* Know precisely the cancellation charges and arrangements and inform your boss. As also confirmation formalities. (Airlines rules are that plane reservations must be confirmed at each point of departure except the initial one).

#### Preparing an Itinerary

- \* A carefully planned itinerary is a guide for the boss in going about the country, and its carbon copy is a constant index by which you may locate him whenever necessary.
- \* Prepare it with accuracy, trying to visualize the trip in order to get in all details.
- \* In listing appointments, include initials, title, address and telephone number of persons to be seen, if you can get these facts from correspondence or other sources.

- \* Check the time intervals and consult where necessary. When you have assembled all of your data, start to go over the trip step by step. Roughly account for each moment. After each hour notation, be sure to put a.m. or p.m.

#### Getting Things Ready to Take on A Trip

The purpose of a trip will ordinarily dictate the things you will pack for your boss's use.

- \* Any correspondence which you think might be valuable should be included, as well as office forms that are needed.
- \* Include a supply of the regular office stationery, personal stationery, a few pencils with erasers, some memo sheets and a small box containing a few clips, rubber bands and postage stamps.
- \* Provide an ample supply of business cards, cheque book and travellers' cheques.
- \* Always keep a special file on each interest, for example, Rotary.

#### Packing Files and Papers

- \* Label envelopes and packages clearly, putting materials to be used on each call in a separate package.
- \* See that your boss's name and a local address, as well as his regular office address, appear on each envelope, so that it can be quickly returned in case packages are lost or misplaced in a strange city.
- \* Pack these envelopes neatly in a case in the order in which they will be used, making a complete list of the letters and documents taken from the office.
- \* When part of a trip is to be taken by car, you must be careful to seal all packages.

#### Forward Bulky Packages By Mail

If the packages are bulky, you may forward them by mail. If you do so, register them should they be valuable papers. Insure them if they have monetary value.

#### How Much Cash To Take

For the sake of safety, most money your boss carries can be in rupee travellers' cheques. Provide a liberal supply of one rupee notes and coins such as 50 paise and 10 paise to facilitate public telephone calls, so that taxi fares can be paid quickly.

#### Try For An Unhurried Departure

Try to avoid a flurry at the last minute. Have everything ready in time for a leisurely leave-taking. Do not hesitate to draw attention to the time should your employer become engaged by a last minute caller.

#### Handling Routine Business While The Boss Is Absent

In his absence, do things as you think he would want them handled. Find out what people want and turn them over to someone else in the office if you cannot help them yourself.

- \* Keep a digest of office activities so that your boss will know what has been done in his absence.
- \* Acknowledge routine mail. You will be able to hand over some mail to others for attention.
- \* Be very careful to put matters away to await your boss's return.

#### Communicating With Your Boss

Communicate with him on all urgent matters choosing the method best suited from the standpoints of economy and efficiency.

#### Forwarding A Digest Of Business Matters

Your boss will feel more at ease if he knows that his work is being thoughtfully cared for in his absence. Do not hesitate to keep him informed, but do not bother him with unimportant things. Try to make communications as cheerful as possible. The boss who gets this communication will have a clear idea of what is being done in all matters needing his attention. Consequently he will find time to read it with interest.

#### When Your Boss Returns To Office

Free yourself as much as possible so you will be able to spend a great deal of your time in helping your boss get back into office routine. A digest which accompanies each day's work should contain all details with which you did not want to bother your employer during his trip.

Carefully check all materials brought back against the original list of things taken from the office. Go over each paper or memorandum carefully to gain an idea of what business was transacted.

#### If He's Returning From A Vacation

Don't litter up your boss's desk as a homecoming greeting! Put most matters in a pending file, so they can be taken up several days after his return.

#### Business Trip Reports

When your boss is dictating from notes and trying to recall events, keep his copy of the itinerary in front of you to check dates and names. An expense voucher is usually attached to a written report. Carefully check all items and turn in on time. Reports of trips should be written up as soon as possible so that details do not escape your boss's mind.

#### Travelling With Your Employer

If work must be done at night see that everything necessary is brought from the office to the hotel. A portable typewriter will free the day for other duties, such as taking notes on meetings, attending to details, and meeting people who desire to consult your boss.

#### USE Of Leisure On A Trip

Provide your own entertainment so that your boss will not feel obliged to take care of you.

### Mr. Boss To Note

According to a survey, there are a few things that tend to get ignored by the boss and that affect the Boss PS team effectiveness:

- \* He fails to give praise for a job well done.
- \* It would be good to hear a word of praise or a compliment now and then instead of being taken for granted'. 'My boss always complains that no one ever praises him for his work, and I feel like saying, "How about you, Mister?"
- \* "I think many bosses assume that their secretaries can read their minds and that's why they pay so little attention to articulation. My boss's mind is faster than his tongue. He gets to thinking about something and he then just jabbers away".
- \* Many executives seem to have a penchant for interrupting their secretaries while they are on the phone and not on personal calls, either.
- \* My boss has the annoying habit of lingering around my desk and picking up all the papers on it'.
- \* My boss keeps employees, visitors, and me waiting unnecessarily by continuing with some other work after he has called one into his office.
- \* 'My boss suffers from a desire to prove that he is THE BOSS'.
- \* Too little attention is paid to 'the little people', in the offices, the ones who do most of the hard work and detail. I mean the clerks, the assistants and the office girls.

### The Office

In maintaining a presentable and functionally effective office, you may use the following points as thoughtstarters:

#### Supplies

- \* Good office supplies make for a good effect.
- \* It is wise to go in for the above average quality. Better err on the liberal side. Avoid false economy.
- \* Order items like paper and typewriter ribbon in a limited quantity.
- \* Make your purchases or collect your supplies in good time - for example, visiting cards.
- \* Check delivery of materials, for quantity, quality and price.
- \* Keep everything in its place.
- \* You have come across a variety of letterheads - if you have suggestions for improvement, do not hesitate to offer them to the boss.
- \* Avoid off standard sizes, where possible.
- \* In ordering printed forms, see that the alignment is adjusted to the typewriter.
- \* When preparing material for reproduction, be more than ordinarily careful to check dates and titles, which are easily neglected in hurried reading.

#### Gifts And Greetings

- \* A Busy boss may ask you to help him in his personal purchases.
- \* Develop market knowledge, judgement and ability.
- \* Keep a calendar of birthdays, anniversaries, holidays, and special events which your boss wishes to remember, so that you can remind him of their approach.

- \* Help your boss to remember early enough either to get the gift himself or allow you to make the purchase for him. In mailing or sending gifts, always see that price tags are removed.
- \* Keep on hand a supply of cards of congratulations and of condolence. The businessman who sends these cards to business acquaintances or associates experiencing some of life's joys or sorrows shows a thoughtfulness which marks him out among men. Little remembrances are very much appreciated, even though the event may not call for a personal letter from a busy executive. You can often apprise your employer of a promotion notice or death which appeared in the papers. Office employees generally feel more disposed to confide in you than in your employer. An executive who sends a card to an office boy who is passing out from night school, or to a clerk who has lost his mother succeeds not only in surprising the employee, but usually in winning his undying devotion.

#### Office Equipment And Gadgets

- \* Visit the stationery shops, look through office equipment catalogues, talk to salesmen, and explore items that have time-saving, face-lifting and efficiency improving possibilities for your office.
- \* The more obvious examples are - Phonopad for phone numbers suitably cross-indexed, Address Registers in alphabetical order, a box for visiting cards of visitors, Press conference Address Register containing names and phone numbers.
- \* In respect of expensive machines, however, before you urge your boss to buy one of them be certain of two things:
  - 1) you will use it often enough to warrant the expense, and
  - 2) its use will cut down appreciably on the cost of extra or outside help.
- \* Do make them tactfully but do not hesitate to make suggestions for the continued betterment of your office.

#### Banks

You may be required to assist your boss on his personal money management. This means ability on the one hand and integrity on the other.

Personal accounts may be handled through a petty cash account, through a power of attorney, or even through an account in the name of the secretary. Whatever the method, the fact is you are handling someone else's money and keeping records is important-and that records accurate and up-to-date.

Here are a few precautions which you may be already observing:

- \* Verify a bill before you make a payment - regarding receipt, quantity, quality and rates.
- \* Obtain a receipt for all payments.
- \* Preferably pay by cheque.
- \* Prepare a cheque carefully-Place the rupee figure so near the Rs. sign that it will be impossible to write another figure before the first one.
- \* Fill out the stub carefully before writing the corresponding cheque.
- \* Always take the bank book with you when you are making a deposit.
- \* Use the tickler file regarding periodical payments - as for example, insurance premium.



### Reconciliation of Bank Accounts

You will probably be called upon to reconcile a bank account. Upon receipt of a bank statement, first verify the amounts of the cheques cashed against the bank statement.

Make a list of 'outstanding cheques'. If a cheque remains outstanding for any length of time, and you suspect it may have been lost, bring it to the attention of your boss.

If an account does not balance as soon as you have made the necessary adjustments, you will have to start a more detailed search. Nothing but sheer persistence will find discrepancies which sometimes occur.

### As A Special Assistant To A Senior Executive

You may be promoted to this position, or you may be appointed to it directly. This is a key position and it will call for the best in you. You will be doing as important a work as drafting the talks the boss has to make.

You may not be able to stick to your own desk which you did as a secretary. Normally, when you become a special assistant to a senior executive, you are given assistance.

You have to choose carefully, from among the duties you are responsible for, those which can be done by him/her. While this job offers great opportunities, it holds tragic temptations too.

If you lose your head, you may use your access to the boss to damn people unfairly. A casual remark made by you at the "right" time can mar the future of an individual and his utility to the organisation.

This may satisfy your sense of sadism but you will be damaging the interests of your boss—it may take some time before you are found out and when you are, you may have to eat humble pie.

If you mean well with yourself, if you mean well with your boss, if you mean well with your organisation, you will have to resist the temptation to resort to character assassination. Instead, in the interests of the organisation, you can resort to deft acts of diplomacy that will help all concerned.

For example, if your boss has dictated a nasty note to a senior officer in the company and that in a temper, you can well wait for a while, till things cool off, explain the facts, and place for his consideration a revised note that will make the point but that will not spoil the relations. The boss and the organisation will appreciate such a thoughtful, institutional approach.

Accepted as a challenge this position offers unusual rewards. If one succumbs to the temptation, one can make miseries for the many and losses for the organisation.

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### Handling Supervision Responsibilities

As you grow in the job, you have to supervise the work of others.

This means:

- \* assisting in the selection of juniors,
- \* orienting them to the job and the organisation,
- \* training them on the job,
- \* assigning work loads, and generally getting the best out of them in such a way that the right thing is done by all concerned.

Each aspect of supervision is a study in itself. Let us consider therefore a few suggestions.

- \* Give the routine jobs like typing tables, cards, or forms to slow typists. Relieve stenographers and typists of jobs that clerks and messengers can do. Similarly, don't give copy work to a stenographer if you have a typist who can do it; save the stenographer for dictation. If you need a stenographer but none is available have someone dictate the material to a typist as he types. Finally, be sure that no time is wasted dictating material that is printed or material that can easily be copied.

Some in your office will be able to get their work done faster than others; be sure that you steadily increase the difficulty of the jobs you give them. This does not mean merely giving them a greater amount of work to do, of course; it means giving them more responsibility. Mention their growing ability to your boss. Each person must feel that he has an opportunity for advancement if he shows that he has the ability.

#### Building A Team

All of us are a lot more willing to work for someone who asks us to do something than we are for someone who tells us to do something. Although as a secretary you may well have quite a bit of authority over your office staff, the less you emphasize it the more respect and cooperation you will get:

- \* Stress the 'team' concept; phrase your job assignments so that it sounds as though you were asking your staff to lend their valuable assistance to a project.
- \* Take time to explain the work to your department and show an interest in what you give them to do.
- \* Remember that your interest and enthusiasm are contagious. Lack of it can cause staff to think of their work as routine and careless work will result.
- \* Courtesy pays. If a typist does a particularly good job on a project, tell him so. On the other hand, if he has made a mistake, even a very minor one, tell him about it in private. Give the boy a chance to explain, too; there may have been a good reason for his lapses.
- \* Be careful to avoid playing favourites; this is ruinous to the team spirit of an office.
- \* Encourage your staff to talk over with you any idea or suggestions they may have about their work. They are closer to some operations than you are and can often give you new ideas or help you avoid what might have been a poor decision.
- \* Finally, talk over the work load problem with your staff; don't just cry for production all the time. Give them the idea that if everyone pitches in with a will, the job can be done well.

### How To Grow In Your Job

If routine work is uninteresting in one sense, unusual work may be uninteresting in another. May be it is not uninteresting in itself, but in the way we look at it. Hence perhaps the saying: To be interesting, be interested.

Are you interested in phases of the business that are outside your specific duties?

Such an interest will make your own work more interesting. What is more, you will be growing in your job. Acquiring additional specialised knowledge in the field of business will give you added opportunities for advancement.

You may consider the following suggestions:

- \* Knowledge of one's special subject: (such as shorthand, book-keeping, filing or billing).
- \* Knowledge of one's job: Find out more about your job--not just what you are doing but what others are doing in relation to your work. Where does your work originate? How is it routed before it comes to you and what happens to it when it leaves your hands? How does the paper work you do in your office relate to the end product of your company manufacture? What are the manufacturing process involved in the production of the product or service? What are the various sections, divisions or departments in your organisation?
- \* Knowledge of one's particular business: (such as insurance, boot and shoe, or wholesale grocery). This can be secured by reading books and trade papers, by conversation with older employees and superiors, by studying the firm's catalogues and other publications and, in general, by keeping one's eyes and ears open at all times.
- \* Knowledge of business in general: This involves such subjects as economics, commercial law, salesmanship, advertising, business organisation, and office management. It also includes a study of such legislative action as affects business.

Those who live in or near large cities can usually attend evening classes; others can study by mail or can secure from the public library books that may be helpful.

- \* Knowledge of business history: This involves both a knowledge of the history and the development of business in general, and also of the rise and development of the particular line in which you are employed.
- \* All this means giving some of your spare time but who else can invest in your growth?

Being near to the boss is a great opportunity to grow. If you look at it that way you can learn so much and so well you can participate in the managerial work, though a little indirectly. If you supplement this by adequate study and project work, you will be ripe and ready for more responsible positions.

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### Preparing For Higher Responsibilities

If your organisation is a growing one, you will be a natural choice for an independent position with higher responsibilities. Normally, you are called one evening and told to proceed to the new unit in the next few days?

You know that an office order can give you added powers but it cannot give you the operational skills needed in a managerial job. Being a

secretary certainly gives you an opportunity to have an overall idea of the unit or the department. If you have been reading as has been suggested in the previous section your business knowledge should be on a high order.

To see a manager manage and to manage oneself are not at all the same. Managerial skill does not come by observation. Many do imitate the boss to whom they were a secretary. While there is nothing wrong in doing this, for the best effect you should have your own style of managing. A secretary is never in the driver's seat; and being a manager is being in the driver's seat.

Here are a few things which you may do to prepare yourself to take over higher responsibilities:

- \* Knowledge is not skill but knowledge helps; read at least one or two good books on modern management.
- \* Avail of any skill development programme going in the following areas:
  - a) Communication skills--oral and written--speaking and listening, writing and reading and committee work
  - b), Human Relations Skills--including Sensitivity skill
  - c) Problem-solving, decision-making and creative thinking skills
- \* Volunteer for project work either on the job or outside. You may initiate a co-operative housing society, for example, by coordinating the efforts of others, you may see a building come up. Taking an active part as a member of the Junior Chamber is another good possibility. Do as many projects as you can independently--and not necessarily at the suggestion of the boss; nor necessarily during working hours.
- \* Books on Executive Development and Self Improvement contain quite a few practical tips for action read the books and executive ideas which appeal to you.
- \* Remember executive jobs are not given, they are taken; Remember too that preparation should precede opportunity; Remember further that all development is essentially self-development.

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## APPENDIX-I

### Professional Management\*

#### What It Takes

Lawrence A. Appley

The basic job of a manager today is to get people to work; to get people to work; to get people to work hard; to get them to work well: to get them to work hard and well in order to perform at a high standard and attain noble objectives. He has to get them to do all this because inside their hearts and soul is a driving desire to do it, along with a great pride in and satisfaction from attainment. This is no job for an amateur! It takes a professional manager!

#### What Is A Professional Manager?

Along with many others, it is essential that he meet at least these five specific qualifications:

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1. The professional manager must understand that there is a vast body of knowledge in the whole area of management.

He must realise that his knowledge that has been developed and made available to us by thousands and thousands of competent and able producers in the profession. He must understand that to be successful in management, he has to be a continuing student of this great body of know-how which he will never master. It must be clear to him that while he is acquiring that know-how which has been discovered for him by his predecessors, new know-how is developing faster than he can keep up with it.

A professional manager is first, last, and always a student of management.

2. The professional manager has a strong, clean-cut, precise image of the orderly processes he must follow in order to fulfil his responsibilities competently.

He must--

Plan,  
organise,  
control,  
measure,  
decide, and  
motivate.

For each of these there are ways that are more successful than others, and the professional continually experiments and improves his own competency.

3. The professional manager knows that there are specific skills for his profession unlike those of any other profession, and appropriate tools for each skill.

He must know what these skills and tools are, the extent to which he possesses them, and have a driving desire within himself to become better at and with them. The maintaining of the economic health of an institution, and the development of a dynamic organisation, the co-ordination of the viewpoints of people and functions, the integration of management decisions with the affairs of the community, the providing of human satisfactions out of work output and relations are a few of these skills.

Just like the sensitive, competent surgeon, a professional manager must exercise the skills of his profession.

4. The professional manager possesses a code of ethics.

He has it in writing and he has it branded into his consciousness and into his behaviour. He has a very specific and vital philosophy of life. He has a philosophy of management. He possesses a philosophy of government in the society in which he lives. There can be no conflict among these three if he is to be a mature, stable leader whose leadership is sustained by an enthusiastic following.

5. A professional manager accepts the disciplines of his profession.

If he is guilty of malpractice, or of violation of ethical codes, he must pay the price. If he is in business and industry, he pays that price in the market place as he goes down to failure and bankruptcy. If his management is in the area of other professions, there are agencies that disbar him. Discipline, however, is a two-edged sword. Not only is there punishment for failure, there is also reward for success.

The professional man accepts rewards with humility, but with an understanding that with success go many, many disappointments. These, however, present greater challenges.

It has been said many, many times that to be a leader, one must lead. In order to lead, one must have a place he wants to take people, and know the route he is going to follow. He must know, in addition, how to get the people he wishes to follow him to want to go where he wants to go and to have confidence that he can get them there. This is the professional manager.

The professional manager has specific objectives. He has a knowledge of the way to attain the objectives. He has confidence in his own ability to take people towards the attainment of the objectives. He has skill in communication and motivation. He makes things happen through sheer, personal capacity and inspirational capabilities. He does not wait for the future; he makes it. He does not react; he acts.

## APPENDIX-II

### The Secretary and the Telephone\*

In your role of the today's secretary, you have many opportunities to help your boss be at his best. You can relieve him of details, help improve office methods and protect his prestige. Your job is doubly important on the telephone because you are representing him.

A pleasant greeting, cheerful smile and businesslike appearance will make 'in person' callers 'feel at home' even when it is necessary to keep them waiting. These attributes, however, cannot be seen over the telephone. Your voice and the proper handling of the call must combine to make the voice-to-voice contact as pleasing as the face-to-face contact.

Handling a telephone call is usually considered simple but very often the type of business your company is in, or the requirement of your boss, tend to make it complex.

Many modern executives prefer to answer their own telephones to promote friendliness and goodwill for their companies and the secretary acts for them only in their absence. Other executives depend on the secretary to intercept and screen calls and in some cases handle them herself. No matter how your boss prefers to have his calls handled, you should always be courteous, pleasant, tactful and diplomatic.

#### Answer Promptly

Make the first impression a favourable one by answering at the first ring, if possible, and be ready to talk to the caller.

#### Proper Identification

Identify the office and yourself like - 'Mr. Ray's office, Miss. D'Sa.' This is time saving and businesslike and gets the confidence of the caller for it indicates that you are a responsible person ready to be of service. You'll find that proper identification prompts the caller to identify himself too.

#### Have Someone Answer Your Telephone

When you leave your desk, advise the person who is to answer for you, where you are going, the telephone number where you can be reached and

when you will return. Give prompt attention to your telephone messages when you return.

### Transfer Calls Carefully

If it is necessary to transfer a call, obtain the callers consent and be sure you are transferring him to the right person. Signal your operator by flashing slowly. When she answers, say 'Please transfer this call to.....' and wait for her acknowledgement.

### Taking Messages

Always keep your message forms handy and record the details accurately and completely while they are being given by the caller. Making a merely mental note you may forget to relay it.

Request, rather than demand, information. Such phrases as 'What's your name? or 'Repeat that, I didn't get it, sound abrupt when compared to 'May I have your name please?' or 'Would you mind repeating that informatio

If the name is an unusual one or contains letters which sound alike, verify the spelling through the technique of key-letter spelling. Also be certain to obtain the initials if it is a name like 'Rao', 'Shah', etc.

It is especially important to be accurate if the message requires action on the part of your boss. Repeat the information to the caller to assure him that you have the correct information.

### Making Outgoing Calls

Whether you are making a telephone call for yourself, or your boss, be sure you have the right number before you make the call. Keep a list of frequently called numbers and up-to-date directories.

When your boss does not wish to place his own calls it is your responsibility, not the operator's, to place them for him. You can take the time to introduce him in a more diplomatic fashion than the operator who is usually too busy to concentrate on the secretarial aspects of a call.

If your boss is the type who disappears or makes another call after you have placed one for him, you will want to give him some training. He may not be aware that these habits are discourteous and irritating to called person and imply that the other person's time is not as valuable as his.

Plan your call before you make it. Knowing before hand what you are going to discuss will make your call brief but effective. Planning saves time and money.

Always stay on the line when you place a call with the operator so she will not have to call you back. This will prevent irritation to the called person, tying up equipment unnecessarily, additional work for the operator and a waste of money by lengthening the call. By staying on the line you can take immediate action if the number is busy or does not answer.

If you are connected to the called person's secretary advise her who is calling for example: 'Mr. Roy of Blank Company is calling Mr. Chopra'. If you reach the called person, announce your boss, for example: Mr. Roy of Blank Company is calling you, Mr. Chopra. Here he is?'

Leave And Return To The Line Properly

When it is necessary to leave the line, for any reason, tell the caller what you are going to do and about how long it will take.

Expressions such as: 'Hold on' 'Just a second' tell the caller nothing. If you know you will be away from the telephone longer than a minute or two, offer a call back stating the approximate time you will call.

When leaving the line, lay the telephone down gently and balance it on the ear-and-mouth-piece using a blotter or a paper as a cushion.

Upon returning to the line, alert the caller to the fact that you are back by using a suitable introductory phrase such as 'HelloSir' or mention his name. If there has been an unavoidable delay, apologise.

Say Good-bye Pleasantly

End your call in the same sincere and agreeable way you began it by saying 'Good-bye' pleasantly. Let your telephone visitor know that you were glad to be of service or sorry you were unable to help. Let the caller hang up first.

Hang up gently and make sure the telephone rests securely on its base.

