



**A Sure
Step to
Supervisory
↑ Positions**

The Job of the Private Secretary

A WORKBOOK BY
N H ATTHREYA

M M C SCHOOL OF MANAGEMENT

A SURE STEP
TO
SUPERVISORY POSITIONS

This is another practical book for another practical level of men and women — the 'subordinate' staff in general and the personal assistants and personal secretaries, in particular.

"Behind every successful executive there is an efficient PS."

This is true of this country, as of every other country.

His/her efficiency is of such a critical nature that every little counts.

This book then will be useful as much to the beginner as to the seasoned.

In fact, it should be of value even to those who are not designed as PSs but who have to play the role of the PS in one sense or another.

While the styled PSs are of recent origin and of a small number, the unstyled but effective PSs run in number, to literally thousands.

Most of them have learnt their job the hard way — by trial and error.

With this book the trial can be less and so the error.

The book emphasises the unique opportunities of the PS's job and it talks of the challenges, satisfactions, and chances for growth.

The chapters on

How to grow on your job for managerial responsibilities should be particularly welcome to every young man and woman.

This understanding book realises the delicate role the PS has to play and makes deft suggestions to "the other partner".

Yes, the *boss* would do well to peruse this book, if only to get the best out of the PS.

To treat a PS as a glorified stenographer is not merely an insult to a talented individual but a loss of opportunity in using good man/woman power.

A SURE STEP
TO
SUPERVISORY POSITIONS

The Job of the
Private Secretary

N. H. ATTHREYA

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BOMBAY

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TO

the private secretaries in India and abroad
whose ability and willingness to support the boss
I have admired and admired and respected.

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WHY THIS BOOK AND FOR WHOM

An efficient P.S.* can double
the effectiveness of a boss—or even more.

That has been our observation
in many of our Executive Effectiveness studies.

The Nation, it has been observed, needs
literally thousands of additional managers every year.
The formal facilities
for turning out the managers
are woefully inadequate,
despite the efforts of existing institutions.

Under the circumstances
two steps seem desirable and feasible.

One is
to help the existing P.Ss
to be more effective,
which means to help the Boss-P.S. team
be a little more effective.

* Short for personal secretary (or personal assistant).

The other is
to help the existing P.Ss
to grow a little faster.
A P.S. has the best chance
of growing into a boss —
provided he is the right timber.

To become an effective manager,
he *does* need preparation ;
and he *does* need experience
in the driver's seat ;
but he has the best emotional
and intellectual opportunities
to arrive early as a boss.

In the case of a lady,
it will be a case of wider responsibilities,
not necessarily higher.
Growth in other words, will be in depth
which is as significant.

Traditionally a P.S. is a lady.
But, except perhaps in larger cities,
lady P.Ss are rare in India.
Even so, in view of the possible future,
a lady as a P.S. has not been ignored.

This book then is
to help the P.S.
be still better on his/her present job ;
and prepare himself/herself for higher responsibilities.

9 Jan. 1967.

Bombay

N. H. ATTHREYA.

THE GOALS - I

WHAT IS *THE* JOB OF THE P.S. ?

What do you think
is the purpose or the objective
of the job of the PS ?

All that you as a PS do
is directed towards a goal.

What is that goal ?

Please write your comments here :

.....

.....

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THE GOALS - II

WHAT IS *THE* JOB OF THE PS?

In specific terms,
what you have stated as the goal
should be right.

What is stated below in broad
terms may give a clue
to restate your goal as PS :

- To make it easy for your boss
to be doubly effective ;
- To help your boss gain time
to think, decide and act
on the executive level,
unhampered by the available details of work
- To legitimately further his
legitimate plans, actions and image.

THE ACTIVITIES - I

What activities do help *you* to reach the objective stated in sections 1 and 2 ?

Can you please list them below in some detail ?

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THE ACTIVITIES -II

What activities help you to reach the objective ?

Here is a suggestive list. In the light of this list you may revise yours.

- Take dictation ;
type correspondence, reports and boss' longhand notes
- Sort incoming mail
- Arrange despatch of mail
- Act as receptionist
- Play " traffic policeman "
- Place calls for boss on telephone and answer incoming calls
- Maintain necessary filing systems
- Manage the supplies
- Schedule appointments
and make sure that he keeps them
- Handle boss' travel arrangements
- Write letters for your own signature and for boss' 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 boss' private office.

THE JOB PECULIARITIES - I

Every job has got its peculiarities.

What is peculiar about your job as PS ?

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 unique features ?

- You work for one boss*
- 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.

THE PLEASURE AND PAINS - I

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

(Please give your comments here....)

Pleasures :.....

.....

.....

.....

Pains :.....

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.....

THE PLEASURE 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' 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.

The dark ones :

- 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.

THE JOB DEMANDS

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

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 are *poised and gracious*.

The job demands
that you play
your boss' representative.

The job therefore demands
that you are *adequately equipped*
physically in appearance and grooming
and *mentally* in knowledge and 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 are *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 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 are *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 are *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
that you lead the little team.

The job therefore may demand
that you have *supervisory abilities*.

DEVELOPING A P. S. PERSONALITY

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

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 knowing.*

Whatever the personality trait, there are three broad rules of action for acquiring them.

And they are :

Seek the opportunity

- 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 ”, for example, should be automatic.

Allow no exception

- It is only repetition of the correct habit that can strengthen that 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 these three rules of action to all the traits that make up a desirable personality for business.

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

Let us quickly summarise the major personality traits :

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
- Diction
- Expression
- Vocabulary

Businesslike Attitude

- Alertness
- Ambition
- Attention
- Confidence
- Co-operation
- Courtesy
- Enthusiasm
- Flexibility
- Honesty
- Industry
- Interest
- Loyalty
- Orderliness
- Patience
- Punctuality
- Self-possession
- Sense of humour
- Sportsmanship
- Sympathy
- Tact
- Tolerance
- Willingness

* Please see Section Three (pages 25-40) of *OVER THE TELEPHONE*, published by MMC School of Management, Bombay.

Ability (Technical Proficiency)

- Accuracy
- Adaptability
- Concentration
- Discretion
- Efficiency
- Imagination
- Improvisation
- Initiative
- Intelligence
- Judgment
- Leadership
- Memory
- Organizing 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 programmes, attending lectures ; and reading good books and magazines are some of the ways by which you can acquire a broad vocabulary.

BUSINESSLIKE ATTITUDE

A pleasing personality is consistent with a businesslike attitude.

This becomes obvious when we see some of the elements of 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 man's opinion.

Another is to desist from acts of dishonesty.

For example,

Lying, stealing, and cheating,

Evasions, telling 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 affairs.

A third is to be loyal to the organisation.
The absence 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 certain balance and cheer
at all times.

Initiative can be a sixth.

Doing things that need 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 pebble,
of not feeling happy with a cosy explanation.

TECHNICAL PROFICIENCY

Technical proficiency is the skill to do work in a superior manner.

And what are some of the elements of 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 for 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.

SPECIAL DEMANDS

There are some special demands peculiar to the P.S'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 *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.

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' responsibilities and professional interests enables you to work more 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 of 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 recognize 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.

WHAT DO YOU KNOW OF YOUR BOSS?

You should know him well as an individual too.

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 P.S. 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 officer 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 question?)
- When shall I take this list
and check 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 the petty annoyances.

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

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 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 home
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 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 his ill-humour out 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* you ;
and you can stay calm.

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

If you have given cause for comments, however,
you can quickly apologize and then get busy
and improve your techniques.

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 idiosyncracies,
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 knowledges and talents,
and to make such adjustments as he can,
and as the circumstances permit,
to your personality,
to your personal circumstances.

MORE DIFFICULT MOMENTS

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

But you can't have the challenging parts alone —
either you have it whole or not at all.

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

How do you feel about routine tasks ?
How is your attitude toward routine tasks 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 P.S. personality will suffer.

Here are some wayouts 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 checklists.

A few samples you see on the next pages.

CHECK LIST FOR TOUR

1. Tour Programme
2. Air ticket
3. Cash
4. Cheque Book
5. Personal Diary
6. Pens & Pencils
7. Folder containing :
 - (a) Inland letter
 - (b) Letter-heads — official
 - (c) Envelopes — official
 - (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

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"

CHECK LIST FOR 'VISITORS'

1. Is he to be picked up ;
by whom, when and where from
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 'Visitors 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

BUSINESS ETIQUETTE

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

Listen to how other people in the office address each other and follow suit.

The safest policy is to address as “Mr. Rao”, or “Miss D’Sa”.

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 told 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 supervisor by a subordinate
who feels his work is so urgent
that it cannot wait until the supervisor is free.
If your work needs the opinion of a supervisor,
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 going on without 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 also.

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

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 actually 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.

P. S. AS A RECEPTIONIST

From time to time you have to play the receptionist. You create the first impression of 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 and to laugh off moments of anger and tensions.
- 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 will do well to post a guide to receive and bring him to your office or the visitors’ lounge.

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 P.S. :

- 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.

YOUR PERSONAL BEHAVIOUR

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

Following are the *inappropriate* personal behaviour :

- Loud talking or loud laughing, in the office or the corridors.
- Using unbecoming language.
- Taking a lengthy tea-break, or lengthy 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.

THE MAIL

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

Presorting :

Presort the mail into categories like :

- Correspondence,
- Book-post material,
- Interoffice mail,
- Immediate,
- Priority,
- Ordinary.

Opening correspondence :

Open those envelopes containing correspondence first.

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 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 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 :

Name of Co. or person & Date	Material Expected	Date Received

Further categorise your letters as follows :

- Letters asking for appointments, setting up meetings or advising of future engagements.
If you are allowed to make 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 meeting mentioned in the letters so that you can keep track of them later.
Also note in your followup system any 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.

How to submit mail to your 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 not otherwise, place the incoming mail 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.

Advertisements and circulars :

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.

TIPS ON TAKING DOWN DICTATION

You know how to take down 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 use 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 for refreshing yourself.
- Your dictation will be easier if you will 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 fastly uttered.
- Write the date in coloured pencil at the top of the next blank page each morning.
- You also save time by keeping related correspondence and information regarding the correspondence papers.
- Another obvious method is to answer the letters yourself wherever possible. In fact, no boss should be compelled to dictate a letter which you 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 do take dictation, sit facing your boss. It helps hearing and understanding easier.

- Be and look alert, interested ;
don't take notes automatically.

Organize 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 beyond the edge of the notebook.
- Be sure you know the number of carbon copies required and to whom they are going. Write the number of 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 :

- Use your left hand to move the page onward as you write.
- 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 of dictation.
Write names out in long hand
so that you will not forget the spelling,
and circle figures
so that you do not confuse them with shorthand symbols.

During "those 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 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.

The 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 from reading over old minutes of the organisation.

You can do a professional job if you will 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 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 notes 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 fairly formal meetings will have a prepared agenda. If the items of business are prearranged, 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.

TIPS ON ACCURATE TRANSCRIPTION

Organize materials before you begin.

These are little things.

As little things go,

they assume undue proportions when ignored :

- Keep typewriter clean and well-aligned.
Keep it covered when you leave office.
Get it serviced once a month.
Change the ribbon on the typewriter
before type starts to look pale.
- 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 outlines, 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 addressees.
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".
Vote for 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 it 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 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 so 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 can change incorrect punctuation, grammatical constructions that are definitely wrong, incorrect spelling, and page numbers or catalogue references that you know are wrong.

But you can't change figures.

You *can't* change expressions and phrases that are characteristic of your boss.

LETTERS YOU WRITE

Wherever possible, you should write letters yourself.

As you grow on 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 congratulation, appreciation, sympathy and regret.

Some of these may be repeat situations.

You can 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 boss's absence.

Dear Mr.....

For the past few days Mr. B has been confined to bed because of flu 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,
P. S.

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 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 one an invitation
- apologising for being absent
- apologising for a delay
- thanking one for a favour
- congratulating someone
- condoling someone
- other letters of sympathy
- requesting 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 will be constantly varying.
The value comes in saving precious *time*.

When a safe and complete form has been written
for one letter,
future correspondence can be modelled
after that pattern.

In respect of social letters particularly,
a prompt reply is essential.
It may be just regretting inability
to attend a function
but they should be replied *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 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 literary style,
use lengthy sentences 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 takes time
but the sooner a start is made the better.

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

- 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 cooperative 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 a letter is securely sealed.

Items accompanying correspondence :

Enclosure is better stapled to the letter than clipped on.

If enclosure is heavy it is better to send 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 envelope :

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

Enclose a self-addressed post card in a letter when you want a brief return message that 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 upto 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.

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, more so in bigger cities.

- Sending express delivery letters to offices on Fridays may not serve the purpose.
- Express delivery letters addressed to post box numbers will not be generally delivered by messenger.

Telegrams :

- Provided there will be some one 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 any additional notes.
- Spell out numerals.

Cables :

- Use the cable address if the addressee has one.
- Write in capitals or type.
- There are two rates — LT and FR.
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.

WHEN THE BOSS IS AWAY

Always follow your boss's personal preferences.

- Your boss may telephone the office each 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 his instructions right on the letter.
- 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.
Mark the folders,
"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 might want to read).
- Prefer staples to pins/clips to fasten enclosures.

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, make up a separate folder for that name and file it.

Be sure, of course, that you check the "Miscellaneous" folders periodically—papers are easily lost in them.

To help others who must use your filing cabinets find papers more easily and more rapidly, keep card index to your files, but this should be upto 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 don't use clips or pins.

To help filing, type the subject on the line below the salutation. Don't 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' goodwill.

Tickler file :

This file is a chronological folder file.

Papers which are to come 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.

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

Both should be clean, tidy and efficiently organized 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. Synchronize 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 the help of observation and some consultation with the suppliers.

A well-lit, a well-ventilated and a well-arranged executive room does make a difference.

It should 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.

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 promptly receive the visitor 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 a get-acquainted material —
pamphlets etc. about your company —
assemble them appropriate to the individual visitor
and keep ready.

Remind your boss about important and routine matters at the proper time —
appointment, meetings, anniversaries and reports due.

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 upto 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,
have the telephone number.
The idea is you should be able to call back
in case your boss can't make it.

If an appointment has been made far in advance,
please confirm it on the day before.

Allow 15 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 a "date book" for him
wherein anniversaries, birthdays etc., are recorded.
At beginning of each week,
go over the list and get his instructions.

CALLERS ON THE BOSS

Many a person wishes 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 that a friend is made every time and that an enemy 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 would 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 Kamath, 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,
 get necessary information down on a memo sheet.
- If his name is difficult to pronounce,
 ask him to spell it for you,
 and note correct pronunciation.
- If the caller must wait for your boss,
 see that he has :
 - (a) a comfortable chair
 - (b) some reading material
 - (c) 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 subjects in which the caller shows an interest.
 Strive to learn about music, drama, current events,
 different sections 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 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 under 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 Kamath, 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. Pai 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 about 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 calendar
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.

The 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 that the caller 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 him to terminate the too-long interview
without showing rudeness to his guest.

Help to terminate a call :

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 similar 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 still remains in the office.
Type this message or something similar
on a small slip of paper.

"Mr. Diaz is here for his 3.00 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.

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 will 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 incharge,
or is 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 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 extremely personal things—
personal to 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 assume privileges that would not be tolerated in employees who are not secretaries.
- Don't use your working time to attend to personal affairs, make 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.
- Don't take more time than that allotted to you for lunch.
- Refuse to listen to or repeat office gossip, scandal, and rumour.
- Avoid time-wasting chitchat 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 under 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 and 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.

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 PS 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 still work with its general outline.

- Help schedule your boss's day, in so far as he will permit.

Create an atmosphere of smooth operation
by using available time wisely
and avoiding any appearance of haste.

Schedule appointments for 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 that 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 and obey the boss *and* that 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 wish 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 :*

An 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.

- Build an instruction book.

This will come handy for any person who substitutes for you.

Also build up “a secretarial manual” — a compilation of the rules which the firm has found useful in eliminating errors and lessening confusion.

You can consider a company loose leaf manual in which you have a brief history of the company, a list of officers, etc.

- Above all, preserve balance and keep a sense of humour.

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 PS 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 the requirement by phone but do send a written request.
- Follow-up the travel agent regarding travel arrangements. Do not take chances.
- Know yourself 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).

If you have to prepare 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 in on 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 might be 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, register them if they are of 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 10 Paise and 5 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 on all matters needing his attention.

Consequently he will find time to read it with interest.

When your boss returns to the 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 any 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 while 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 one survey,
these 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, incidentally.
- “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 thought-starters :

Supplies :

- Good office supplies make for 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 come across a variety of letterheads — if you have suggestions for improvement, do not hesitate to offer to the boss.
- Avoid off standard sizes, where possible.
- In ordering printed forms, see that the alignment is adjusted for the typewriter.

- When preparing material for reproduction, be more than ordinarily careful to detect all errors.
Be particularly 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, judgment 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 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 such and such machine, 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 PS.

Whatever the method, the fact is you are handling someone else's money and keeping records is important — and that 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 in before the first figure.
- 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.

SECTION II

GROWTH :

PROBLEMS & PREPARATION

AS A SPECIAL ASSISTANT TO A SENIOR EXECUTIVE

You may be promoted to this position,
or you may be appointed straightaway.
This is a key position
and it will call for the best in you.

You will be doing as important a work
as even drafting the talks the boss has to make.

You may not be able to hold on to the desk
which you did as a PS.
Normally, when you become a special assistant
to a senior executive,
you are given assistance.

You have to choose carefully,
from among the work you are responsible for,
that which can be done by him/her.

While this job holds 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 the 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 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.**

HANDLING SUPERVISORY RESPONSIBILITIES

As you grow on 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 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
regarding one or two aspects :

- 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.

Pick the most promising typist,
if your boss approves,
and train him to be your assistant.
He'll be a bigger help when the work load gets heavy
and eventually he'll be able to substitute for you
when you're on vacation or sick.
Such promotions from within boosts the morale
of every employee.

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 your staff to think of their work as routine and careless work will result.
- Courtesy pays off, too.
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 what was done.
- 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 some 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 and done well.

HOW TO GROW ON YOUR JOB

If routine work is uninteresting in one sense,
unusual work may be uninteresting in another sense.
May be in itself not uninteresting,
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 of your specific duties ?

Such an interest will make your own work more interesting.

What is more, you will be growing on 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 processes 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 will 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.

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 operational skills needed in a managerial job.

Being a PS 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 of 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 PS. While there is nothing wrong in doing this, for best effect you should have your own style of managing.

A PS 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 atleast one or two good books
on modern management.*
- Avail of any skill development programme going
in the following areas :
 - Communication skills — oral and written —
speaking and listening, writing and reading
and committee work
 - Human Relations Skills
—including Sensitivity skill
 - Problem-solving, decision-making and
creative thinking skills
- Volunteer for project work either on the job or outside.
You may initiate a cooperative housing society,
for example.
By coordinating the efforts of others,
you may see a building come off.
Taking 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 execute what 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.

* Please see Appendix III.

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 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 ;
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 :

* Reproduced by special permission
from American Management Association.

1. He must understand that
there is a vast body of knowledge
in the whole area of management.
He must realize that
this is 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 fulfill
his responsibilities competently.*
He must plan,
organize,
control,
measure,

decide,
motivate, etc.

**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,
the development of a dynamic organization,
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 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
toward 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 to-day'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

* From *Over the Telephone — Etiquette and Efficiency* published by M. M. C. School of Management, Bombay-22. Reading of the entire book may prove a rewarding experience for you and your colleagues.

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 caller's 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 mental note
being incomplete or, in the rush of business,
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 information?*"

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 the called person and imply that the other person's time is not as valuable as his.

Plan your call before you make it.
Knowing beforehand
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*" or "*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 "*Hello, Sir*" 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.

APPENDIX III

RECOMMENDED READING

REFERENCE

- MODERN ENGLISH USAGE by *H. W. Fowler* (Oxford University Press)
PENGUIN ENCYCLOPAEDIA Ed. *Sir John Sumnerscale* (Penguin)
ROGET'S THESAURUS (Penguin)

GENERAL MANAGEMENT

- THE ESSENCE OF MANAGEMENT by *Mary Cushing Niles* (Orient Longmans)
THE PRACTICE OF MANAGEMENT by *Peter F. Drucker* (Heinman)
BUSINESS OF MANAGEMENT by *Roger Falk* (Penguin)
PRINCIPLES OF MANAGEMENT by *L. J. Kazmier* (McGraw-Hill)
MOTIVATION & PRODUCTIVITY by *S. W. Gellerman* (American Management Association)

FUNCTIONAL MANAGEMENT

- PERSONNEL MANAGEMENT IN INDIA (Indian Institute of Personnel Management)
MODERN MARKETING by *Harry Hepner* (McGraw-Hill)
SOCIAL PSYCHOLOGY OF INDUSTRY by *J. A. C. Brown* (Pelican)
FACTS FROM FIGURES by *M. J. Moroney* (Pelican)
HOW TO BE ON THE RIGHT SIDE OF LAW* by *N. H. Athreya, C. M. Shukla & V. Murali* (MMC School of Management)
OFFICE MANAGEMENT by *William H. Leffingwell* (McGraw-Hill)
MANAGEMENT IN ACTION by *Lawrence A. Appley* (Times of India Press)

SELF IMPROVEMENT

- USES AND ABUSES OF PSYCHOLOGY by *H. J. Erfesenck* (Pelican)
THE COMPLETE PLAIN WORDS by *Sir Ernest Gowers* (H.M.S.O., London)
LEADERSHIP PARTICIPATION SKILLS by *N. H. Athreya* (MMC School of Management)
READ BETTER, READ FASTER by *N. H. Athreya* (MMC School of Management)
THE YOU & I IN BUSINESS by *N. H. Athreya* (MMC School of Management)
OVER THE TELEPHONE — ETIQUETTE AND EFFICIENCY (MMC School of Management)
SO YOU WANT TO BE A MANAGER* by *N. H. Athreya* (MMC School of Management)
ORAL COMMUNICATION* by *N. H. Athreya* (MMC School of Management)
WRITTEN COMMUNICATION* by *N. H. Athreya* (MMC School of Management)
HOW TO GET MORE DONE IN LESS TIME* by *N. H. Athreya* (MMC School of Management)

* Under Print

