

YOU ARE A
**PROFESSIONAL
OFFICE ASSISTANT**

YOU CAN CHOOSE TO BE ONE.

A PROFESSIONAL — A DOCTOR, A LAWYER OR
AN ASSISTANT — TAKES A FEW CONSCIOUS,
SYSTEMATIC STEPS :

ONE, (S)HE STUDIES ORGANISED KNOWLEDGE
ON THE SUBJECT.

TWO, (S)HE "APPRENTICES" TO A SENIOR.
THREE, (S)HE KEEPS LEARNING,
KEEPS GROWING.

FOUR, (S)HE PURSUES EXCELLENCE,
TECHNICAL AND HUMAN.

FIVE, (S)HE ABIDES BY A CODE OF ETHICS.
BEING A PROFESSIONAL IS A JOURNEY,
NOT A DESTINATION.

THIS BOOK HELPS YOU GET A HEADSTART
IN THAT JOURNEY.

Dr. N. H. Athreya

MMC SCHOOL OF MANAGEMENT
BOMBAY 400 020.

THE AUTHOR :

N. H. Atthreya

Professor Atthreya is an author, educator, consultant and concerned citizen.

Dr. Atthreya is the author of over 20 books on various aspects of modern management and self improvement. He is also the Editor of a monthly, "Management Ideas" which started in 1963.

Professor Atthreya is a leading educator on organisational, managerial, and personal growth. Since 1956, he has been heading a post-experience Continued Education Centre, MMC School of Management. He has conducted workshops and seminars for several hundred organisations, on a variety of topics, and to many levels of personnel, starting with Top Management. To be fair to his calling, he spends part of the year as a student, here and abroad — he attends programmes and makes study tours; he does not confine to a narrow speciality — his concern is the total and dynamic growth of an individual professional; and he takes time off for research; and he is constantly innovating so that the learning process can be a joy. He is a member of a number of national and international organisations; and he has been often invited to present papers at several international conferences. He is a visiting professor at NITIE and Administrative College of Maharashtra Government.

Dr. Atthreya is a pioneer management consultant who started the firm Modern Management Counsel in 1954. He is a Past President of the Management Consultants Association of India. He specialises in problem-solving, opportunity search and Value Engineering Management. In professional circles, he is called "Mr. Idea". His company's philosophy is 'complementing and supplementing concerned Management'. The company abides by a self-imposed code of professional ethics.

Professor Atthreya is a concerned and public-spirited citizen. He is the founder and Hon. Director of the Indian Centre for Encouraging Excellence. He is on the Board of Jnana Prabodhini. He has served on a number of professional bodies and government committees. He has been an active Jaycee and Rotarian. He is listed in Who is Who in India, Who is Who in Asia and Who is Who in the World. He donates his professional services to non-profit organisations like hospitals a few weeks in a year.

Address: P.B. No. 11269 Bombay 400 020 India

TWELVE PILLARS TO BUILD HAPPINESS

- 1 **Live a simple life.** Make simplicity the keynote of your daily plans. Simple things are best.
- 2 **Spend less than you earn.** It may be difficult, but pays large dividends in contentment.
- 3 **Think constructively.** Store your mind with useful thoughts.
- 4 **Cultivate a yielding disposition** and resist the common tendency to want things your own way.
- 5 **Be grateful.** Begin the day with gratitude for your opportunities and blessings.
- 6 **Rule your moods.** Cultivate a mental attitude of peace and good will.
- 7 **Give generously.** There is no greater joy in life to render happiness to others than by means of intelligent giving.
- 8 **Work with right motives.** The highest purpose of your life should be to grow in spiritual grace and power.
- 9 **Be interested in others.** Divert your mind from self-centredness.
- 10 **Live one day at a time.** Concentrate on your immediate task. Make the most of today.
- 11 **Have a hobby.** Cultivate an avocation to which you can turn for diversion and relaxation.
- 12 **Keep close to God.** True and enduring happiness depends primarily upon close alliance with him.

Grenville Kleiser

PROFESSIONAL OFFICE ASSISTANT

N. H. ATTHREYA

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BOMBAY

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CODE OF ETHICS

AS A PROFESSIONAL

I Acknowledge:

THAT I have an obligation to the science and art of management. I will uphold the standards of my profession, continually search for new truths and disseminate my findings. I will keep myself fully informed of developments in the field of management and cooperate with others in the use of our common knowledge.

THAT I have an obligation to my employer, whose trust I hold. I will endeavor, to the best of my ability, to guard his interests, and to advise him wisely and honestly.

THAT I have an obligation to do all in my power to assure the progress and contentment of my fellow workers. I will at all times deal with them fairly and openly, sharing of my acquired knowledge and experience freely.

THAT I have a dual obligation to society, arising through my personal and company relations in the social and economic life of our nation.

THAT I have a continuing obligation to my country and to the chosen way of life of my fellow citizens.

FURTHER, I acknowledge my responsibility to discharge these obligations to the best of my ability.

Courtesy : National Office Management Association (U.S.A.)

BE THE BEST OF WHATEVER YOU ARE

If you can't be a pine on the top of the hill
Be a scrub in the valley — but be
The best little scrub by the side of the rill;
Be a bush if you can't be a tree

We can't all be captains, we've got to be crew,
There's something for all of us here.
There's big work to do and there's lesser to do
And the task we must do is the near.

If you can't be a highway then just be a trail,
If you can't be the sun be a star;
It isn't in the size that you win or you fail —
Be the best of whatever you are.

Douglas Malloch.

* * * * *

The great thing in this world
is not so much where we are,
but in what direction
we are moving.

Oliver W. Holmes.

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WHY THIS BOOK AND FOR WHOM

Most working teams have a boss
and a number of Assistants.

Every assistant is an important member of a team.
This is noticed in British concerns even today.

The boss may have had some training ;
often, it is not the case with the assistants.

Where the assistants know their role,
and play their role well,
the team's effectiveness is pleasantly visible.

This book seeks to help the assistant know his role.

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 professional assistants
to be more effective,
which also means to help the Boss-Assistant(s) team
be a little more effective.

Throughout the book, we will use PA as short for professional assistant,
or assistant.

The other is
to help the existing PAs
to grow a little faster.
A PA 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.

A refreshing development in recent times
is that more and more women
are taking careers in industry and government.

If I have used 'he' and not 'she',
it is only for reasons of convenience.

I wish there were a word
which will alike stand for 'she' and 'he'

This book is to help the PA
be still better on his present job.

A good follower makes a good leader.

A good assistant makes a good boss.

All of us play both the roles ;
knowing one helps knowing the other.

This book is thus to help him
prepare himself for higher responsibilities as well.

THE GOALS - I

WHAT IS *THE* JOB OF THE PA ?

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

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

What is that goal?

Please write your thoughts here :

.....

.....

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THE GOALS - II

WHAT IS *THE* JOB OF THE PA?

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 PA :

- 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 - II

What activities help you reach the objective?

The details will vary with situations. The following is a suggestive list. The accompanying pages touch on all of them.

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 reach the objective?

The details will vary with situations.

The following is a suggestive list.

The accompanying pages touch on all of them.

- 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
-

THE JOB PECULIARITIES - I

Every job has got its peculiarities.

What is peculiar about your job as PA?

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 are an integral part of a managerial/executive team
- You have to relate with people inside and often outside the organisation
- Your workplace is stationary
- You act as the boss' public representative.

THE PLEASURES AND PAINS - II

The following bright and dark spots have been reported:

The bright ones:

You get all the little things

any of the tasks the job involves

You get to know more about the

has job

You get to know more about the post

You get to know more about the

a relation with the and

respect

You thereby are

being held to

responsible position of

The dark ones:

You can't be individualistic

You have to be

a silent sufferer of your boss' mood

You are not the master of your own

of pain

THE PLEASURES AND PAINS - I

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

(Please give your comments here.....)

Pleasures :

.....
.....
.....

Pains :

.....
.....
.....

THE PLEASURES AND PAINS - II

The following bright and dark spots have been reported :

The bright ones :

- You get all the thrills of an executive job without any of the risks the job involves.
- You get to know more about the boss' 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 PA

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, and the like.
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.A. PERSONALITY

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

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

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 journals 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” or “finishiative” 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 the 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 some 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 PA'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.

Learning about your boss' responsibilities and professional interests enables you to work more closely with him in many ways. This is to get 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 PA.

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

DO YOU KNOW YOUR BOSS?

- You are a member of the boss' 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 PA.

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 PA
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 ?
In good parts, 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, and
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 PA 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. Prepare your own.

A few samples you see on the next pages.

CHECK LIST FOR TOUR

1. Tour Programme
2. Air ticket
3. Cash and Coins
4. Cheque Book
5. Personal Diary
6. Pens & Pencils
7. Folder containing :
 - (a) Visiting Cards
 - (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 senior by a junior
who feels his work is so urgent
that it cannot wait until the senior is free
If your work needs the opinion of a senior
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.A. 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 the visitor’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 PA.

Here are a few hints for the lady PA :

- 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 INSTRUCTIONS

Right throughout the day,
the boss may keep giving instructions.
This he may do over the phone or in person.

The boss expects you to get it right,
to do in time,
and to report progress.

Keep pad and pen handy.
Note down the instructions
in his presence preferably,
or at the earliest after the meeting.

If the requirements are not clear,
do ask him to explain again or differently.

If a visitor is there,
postpone asking for clarification in his presence.
You may wait till the visitor leaves.
It will make for your comfort and the boss'.

Use proper words and tone
when you ask questions.
Don't make them abrupt.
Say, for example :
" This point is not quite clear to me.
Can you please help me to understand ?"

Usually the boss gives instructions in a hurry
and he assumes you have got them right.
If you have the least doubt, therefore,
check and make sure.

If he gives a number of instructions,
please get from him the order of priority.
He knows you have only two hands and eight hours.

If it is a new job,
you may also ask him
about any do's and don'ts he may have.

Many jobs have a time dimension.
It is well to ask the boss :
By what time you want me to get that done, sir ?

When you complete the job,
Please inform the boss it has been done.
Either in person or over the phone.
Or the way he prefers ;
but do report back.

If the job is likely to take a long time,
please inform him of the progress
from time to time.

If the progress is not smooth,
please tell the boss *in time*
that you are facing rough weather.
If you need help, please ask for it — in time.
Please tell him exactly what help you want.

The boss wants suggestions **earlier**
and not explanations or excuses **later**.
You know it.
That is why it is well not to keep the boss
in the dark.

The assistant that reports back
is popular with the boss :
the boss' tension is that way reduced.

COMPLETED STAFF WORK

The major job of the asistant is to assist, to assist the boss, especially in making decisions.

There are routine decisions and non-routine, special decisions. Even in respect of routine decisions, the sanctioning authority may only be the boss. Unless you are authorised to take it, you can only recommend a decision.

Making a recommendation is a **responsible job**. In all probability, your recommendation will be straightway acted upon by the boss. The decision will have implications ; and the boss will be held accountable.

One skill of the professional ASSISTANT is the skill of *completed staff work*

It consists of submitting the papers in a way that it can be readily processed.

One approach will consist of the following steps :

1. Defining the problem
2. Listing alternate solutions
3. Making a recommendation.

For example : a paper may call for a note like this :

Problem : Unsatisfactory output of despatch section

Alternate solutions :

- (a) Introduce incentive scheme to increase
- (b) Remove material bottlenecks
- (c) Increase number of people
- (d) Subcontract to the distributor.

Recommendation :

- (i) We may experiment with solution (a), for three months.
- (ii) In case this solution does not work, after review after three months, we may attempt solution (d).

How much detail to give will depend upon the boss' preferences.

WORKING WITH PEOPLE WORKING THROUGH PEOPLE

Assistants deal with things.
More often, they deal with **people**.

To deal with things to good effect,
we need to *understand* things.

The same holds true for people.
In fact, even more so.
People are complex, unique and changing.
This makes it difficult to understand them.
But understand we must
if we have to work with them,
if we have to work through them.

There are several psychologies, east and west,
that seek to help us understand people.

We will take a few lessons from one of those schools.

The purpose is to understand people
and deal with them in such a way
that they respond and not react,
that they give their best,**
and not give their worst.

We are concerned with behaviour
and therefore sources of behaviour.

There are three identifiable sources
of behaviour in each one of us.

When there is a stimulus.
one of these sources gets activated.
If we are *not* aware and alert,
we tend to let our action be governed by that.
The resulting action may be appropriate
or may not be —
it is left to chance.

* * This author's book, "YOU AND I IN BUSINESS :what Makes People Give Their Best" deals with this theme in some detail.

If we are aware and alert,
before we act automatically,
we are able to exercise options
in our behaviour.

We quickly — very quickly — ask :
Is this the appropriate source for this situation ?
What is more significant,
we are able to tell ourselves :
If it is not, switch over to the appropriate source.
And we can do it.
It takes awareness, alertness,

Let me illustrate.
The boss asks you :
Where is file AB — 54 ?

You have the option to give several answers.
You can say, for example :
(a) “Don’t ask *me*.”
(b) “You ask me for everything :”
(c) “I saw it last evening with Vimal.”

You may be “tempted” to use
the alternative (b).

If you *know* you have options,
you will consider them.
If you further know you have the power
to exercise the appropriate option,
you will exercise that power.
You will probably choose alternative (c).

This is when we are at the receiving end
of a communication,
of a transaction.

We are also at times
at the giving or stimulus end
of a communication or transaction.

If we go about in one way,
we will trigger one type
of the source button.
If we go about in another way,
we will trigger another.

For example, if we ask in a rough tone,
“Where the hell did you keep the AB — 54 file ?”
the chances are the other person may say :
“ Have I no better business ?”
Or he may say :
“ Search me !”

We have provoked a reaction.
We have not evoked a response.

In other words, the way we behave
influences the way the other behaves.
Positively or negatively.
There is no guarantee
but the chances are good that way.

We know this at our gut level
but we do not act on it more often.
This is where the psychological research base
comes handy.
When we know the rationale behind our behaviour,
ours is likely to be informed behaviour.
‘Likely’ because understanding is just the beginning.
Adequate artful application is essential.

The psychologists say
there are three identifiable parts
of our personality.
We can even say that
there are three "people" inside us,
each having distinct characteristics.

One part they call P,
another they call A,
and the third they call C.

C STATE

C is the recorded (in our system) experience
of the little person we once were.
It consists of our childhood responses
to what the parents said and did.
These are like tapes that replay in the present
when we are put in a situation
similar to that of the little person we were.

C also includes our instincts,
our physical selves, curiosity and intuition.
When we are in the C state,
we feel, act and look like
the little person we once were.

When we are feeling and acting
as we did when we were a child
we are in our C state.
For the moment, we are 3 or 5 years old.
We see this C State in us
when we watch football or one day cricket games
or when we are at a picnic.

One way to recognise if we are in C state
is to watch what we do or say and how we do it.

Our *voice* is
excited, loud, giggling, teasing,
whining, defiant, quivering or apologetic.

When we are in the C state,
we tend to use feeling *words* like
want, won't, super, scared, wish, can't, sorry or try,
look at me, you make me cry, don't know, I promise,
nobody loves me, I don't care, I don't know,
I wish, I hate, Mine is better than yours, let's play.

Our *expression* is
uninhibited, spontaneous, loose,
sad, helpless, sullen.

Our *attitude* is
curious, fun-loving, changeable, self-centred, imaginative
compliant, ashamed, backbiting, or depressed.

Our *body language* is seen in
downcast eyes, nail biting, shrugging shoulder,
biting lower lips, liberal tears.

P STATE

P is that part of our personality
which holds recordings of
what we absorbed **unedited**
from parental figures,
from what they did and said,
when we were very young.
We do not think with it.
We merely play it back.
We do and say things
as our "parents" did and said
when we are in this state of our personality.

When we are in P state,
we tend to think, feel and act
as our parent figures did.
We act like a taperecorder, when we face situations.

We use *words and phrases* like
never, should, always, don't, ridiculous,
good, nice, splendid, don't worry, try again, let me,
It is so because I say so, how dare you, remember,
goodness, irresponsible, careless, stupid, nonsense,
naughty, lazy, shut up, if I were you,
what will the neighbours say, don't be afraid, duty,
trouble maker, do not disturb, I'll take care of you,
shocking, do this now, sunny.

Our *voice* then is
critical, authoritative, condescending,
comforting, sympathetic, concerned.

Our *expression* is
frowning, angry, overbearing
accepting, caressing, smiling or consoling.

Our *attitude* is
judgemental, moralistic, unthinking, oppressive
caring, supportive, tender, understanding.

Our *body language* is seen in
pointed finger, wrinkled brow, pursed lips,
comforting touch, patting a person.

A STATE

A is that part of our personality
which is data-based, logical and rational.
This is a state we grow into.

When we are in A state,
we tend to gather data, compute objectively
and deal with current reality.

We use *words and phrases* like
how, what, why, where, how much, factual,
objective, practical, alternative, possible,
results, consequences, correct, I see,
what are the facts, this is to be proved,
my choice is, what are the reasons.

Our *voice* is
even, enquiring, calm, confident, emotionless.

Our *expression* is
thoughtful, straight, alert,
interested, listening.

Our *attitude* is
open, level, matter of fact,
checking back, differentiating fact from opinion.

Our *body language* is seen in
straight posture, looking into the eyes.

P, A and C are *all* ours ;
they are with *all of us* ;
they are good *and* useful.
The *art* of managing oneself and others
is one of moving and acting from *the appropriate state*.

**When scores of books are on this subject,
we can realise there is more to this psychology
than what we have outlined here.
This can be just a start.**

To know more on this subject, you can read books like "Born to Win" by Jongsward and James, *Nanum Neenum* (Malayalam) by George Kandathil, *Yar Inda Nan ?* (Tamil) by Kandathil or Yashasvi Manas Vyavahar (Marathi) by V. P. Paranjape

LETTERS

A fair amount of office work calls for the ability to write letters, prompt, clear, courteous and convincing letters.

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

You may prepare the draft letter or you may prepare the final letter.

Whatever the situation, you will do well to constantly step up your skill of writing clear and effective letters.

A good place to begin is to start with the repeat situation letters. For example, a letter to make hotel reservation or to follow up an order, or to acknowledge mail in your boss' absence.

In the case of repeat situations you may build a loose leaf file of **standard** letters.

The advantages include :

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 in record time.

You can get the job done by a junior.

By way of illustration :

Situation : Acknowledging mail in boss' 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 ofwill be handed to him immediately after his return.

Very truly yours,

P.A.

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' 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.

• Sending express delivery letters to offices on Friday 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 changed.

• 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 (i.e. Fifty and fifteen).

Cables :

• Use the cable address if the cable address is given.

• Write in capitals or type.

• There are two rates — For I and the rates are shown half of the full rate. A minimum of five words applies to the rate of FR.

• 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. (E.g. Fifty and fifteen)

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' 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 PA 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.

GOOD HOUSE KEEPING

A good healthy working place
makes for productive working.

You need the cooperation of others
including that of the boss,
to keep the office tidy, neat and comely.
Having said that,
you can take the initiative
in making the office lookable.
The boss will surely help.

This is essentially one
of taking care of little things.
A little thoughtfulness, a little care,
a little effort, a little healthy habit :
that is all that matters.

Keeping things orderly,
keeping the desk clean,
dusting the roof and the windows,
washing and changing the curtain,
getting items repaired that need repairing,
a poster here, a painting there :
this is neither complex nor costly.

One can say these are little things.
They are little things.
Little things are little
only so long as they are not ignored.

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 PA
 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 PA
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 PA 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 PA

you have to relay your boss's instructions
to the people in the department
and bring their response back to him.

You will have to speak with people in other departments
to urge them to send, for example,
the reports to your boss 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 are a professional.
One step a professional consciously takes
is to abide by a code of ethics.
Such a code of ethics includes
self-supervision
and self-discipline.

- Do not assume privileges that would not be tolerated in employees who are not a PA.
- 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 PA 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' 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' 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 “an office 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 PA 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 50 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 and trying to recall events, keep his copy of the itinerary in front of you to check dates and names.

An expense voucher is usually attached to a written report. Carefully check all items and turn in on time.

Reports of trips should be written up as soon as possible so that details do not escape your boss's mind.

Travelling with your employer :

If work must be done at night, see that everything necessary is brought from the office to the hotel.

A portable typewriter will free the day for other duties, such as taking notes on meetings, attending to details, and meeting people who desire to consult your boss.

Use of leisure 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-PA 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 peons and the like.

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 PA

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

A PA 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
 - Interpersonal skills
 - 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 PA AND THE TELEPHONE *

In your role of to-day's PA,
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 PA acts for them
only in their absence.
Other executives depend on the PA
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, gently tapping twice
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

A REFERENCE BOOK SHELF

This can be a reference book shelf **plus**.

The following subject/book titles are indicative.

By visiting a good book shop periodically, you can selectively add to your collections.

1. A shelf encyclopaedia
2. A modern dictionary
3. A book of quotations
4. A handbook—e.g. Top Management Handbook, Purchase Manager's Handbook, Secretary's Handbook — depending upon your boss' needs.
5. A book on office management
6. A book on communication
7. A book on behavioural sciences
8. A book of synonyms and antonyms
9. A year book
10.
11.
12.
13.

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

"Behind every successful *executive*
there is an efficient PA."
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 *designated* as PAs
but who have to play the role *of* the PA
in one sense or another.

While the styled PAs are of *recent* origin
and of a small number,
the unstyled but effective PAs *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 PA'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 PA 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 *PA*.
To treat a PA as a glorified *clerk*
is not merely an insult to a talented individual
but a loss of opportunity in using *good* man/woman power.