DCE5631
THEORIES AND PRACTICES OF ADMINISTRATION
(Teori dan Amalan Pentadbiran)

Associate Professor Dato’ Dr. Norhasni Zainal Abiddin

(UNIT 1-10)

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COURSE TITLE : THEORIES AND PRACTICES OF ADMINISTRATION

CODE : DCE 5631

CREDIT : 3 (3+0)

CONTACT HOUR : 1 x 3 hours per week

LECTURER : Prof. Madya Dato’ Dr. Norhasni Zainal Abiddin

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OBJECTIVES : Upon completing the course, students should be able to:

1. conclude the theories and concepts of administration (C6)
2. compare the case study theories with the experience in work place (C6, A5, CS, CTPS, TS)
3. create effective strategies to solve problems in an organization (A5, P7, TS)

SYNOPSIS : This course focuses on the fundamentals of administration with special attention given to environment changes, such as stress and time management; ethical theories and behaviors; workplace team and environment; effective communication; technology; records and financial management; effective meetings and conferences; travel arrangement; job search.

Topics to be Discussed : 1. Introduction
- Introduction to management and organizations
- Management yesterday and today

2. The workplace- constantly changing
- Forces for change in the workplace
- Workplace strategies for coping with change
- Career opportunity

Hour

3

3
3. Stress and time management
   - Stress and its effects in the workplace
   - Factors contributing to workplace stress
   - Techniques for managing stress, anger and time

4. Ethical theories and behaviors
   - The importance of ethics
   - Discrimination-its implications for the organization
   - Ethical change

5. Workplace team and environment
   - Teamwork
   - Workplace team composition
   - A safe and healthy environment

6. Effective communication
   - Verbal and nonverbal communication
   - Written communication
   - Presentation skills
   - Telecommunications-technology and etiquette
   - Workplace mail

7. Records and financial management
   - Filing rules and procedures
   - Records technology
   - Financial analyses-organizational and personal

8. Effective meetings and conference
   - Effective meetings
   - Meeting roles and responsibilities
   - Conference and conventions

9. Travel arrangement
   - Domestic travel
   - International travel
   - Organizational travel procedures

10. Job search and advancement
    - Matching skills, values and interest with job possibilities
    - Developing job interview skills
    - Developing job advancement strategies

Total 42
ASSESSMENT : Individual assignment 60%

Final Examination 40%

Total 100%


NAMA KURSUS : TEORI DAN AMALAN PENTADBIRAN
KOD KURSUS : DCE 5631
KREDIT : 3 (3+0)
JAM PEMBELAJARAN PELAJAR : 120 jam per semester
PRA SYARAT : Tiada
OBJEKTIF : Di akhir kusus pelajar akan dapat:

1. menyimpulkan teori dan konsep pentadbiran (C6)
2. membanding dan mendiskriminasikan teori kajian kes dengan pengalaman di tempat kerja (C6, A5, CS, CTPS, TS)
3. mencipta dan mencadangkan strategi yang efektif bagi mengatasi masalah yang wujud dalam sesebuah organisasi (A5, P7, TS)

SINOPSIS : Kursus ini memberi fokus kepada asas pentadbiran yang memberi penekanan kepada perubahan persekitaran seperti pengurusan masa dan tekanan; teori etika dan tingkahlaku; pasukan dan persekitaran di tempat kerja; komunikasi yang efektif; teknologi; pengurusan rekod dan kewangan; mesyuarat dan persidangan yang efektif; pengaturan perjalanan; pencarian pekerjaan.

(This course focuses on the fundamentals of administration with special attention given to environment changes, such as stress and time management; ethical theories and behaviors; workplace team and environment; effective communication; technology; records and financial management; effective meetings and conferences; travel arrangement; job search.)

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**Jumlah** 42

**PENILAIAN**
- Kerja Kursus 60%
- Peperiksaan Akhir 40%
### RUJUKAN


### PENILAIAN

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<td>Tugasan 2</td>
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| Peperiksaan Akhir | 40%   | • Jenis soalan: essay  
                      • Jangkaan jumlah soalan: 10-15  
                      • Anggaran jangkamasa: 1 jam 30 minit  
                      • Unit terlibat: Unit 1-10 |
ASSIGNMENT 1

1. Describe a recent administration problem in your organization.  
   a. What were the recent administration problems?  
   b. What decision strategy was used? 
   c. How open was the decision-making process? 
   d. What were the consequences of the administrative action? 
   e. Assess the success of the action

2. Students are to find a job advertisement for a position that interests them. After reviewing the required skills, they should make a list of the skills they currently possess, identify areas where they need improvement, and describe their plans to improve their skills in those areas.

3. Students are to interview an administrator about stress in the workplace and how to overcome the stress. Students are to prepare a report to summarize the interview that includes the name of the person interviewed, his or her title, and the name of the organization. Please include the photos of the administrator to prove that you have interviewed them.

4. Students are to find a news article on the Internet about a company that demonstrates ethical AND unethical behavior. Provide your critical comments based on your reading about the articles.

Instructions/Guidelines for the Assignment 1:

- The answer for each question should not exceed 7 pages in length (around 28-35 pages), 1.5 line spacing, Times New Roman font.

- The answers must be supported by relevant theory/theories and should be discussed critically.

- Please include Table of Contents and References.
ASSIGNMENT 2

1. Students are to interview an individual responsible for hiring employees at a local business. They are to ask the questions listed below and to create 5 additional questions. Students should write a report describing their findings.

- What personal qualities do you look for in an employee?
- What types of things do you first notice about an applicant?
- What do you look for when trying to determine an applicant’s work ethic?
- Does your business have a formal dress code, or is there an unwritten policy?
- What standards are included in your dress code?
- How important is business etiquette?

Instructions/Guidelines for the Assignment 2:

- The answer for Assignment 2 should not exceed 20 pages in length (around 15-20 pages), 1.5 line spacing, Times New Roman font.

- The answers must be supported by relevant theory/theories and should be discussed critically.

- The report should be divided into the sections stated below:
  o Table of Content
  o Introduction
    ▪ Introduce the research/project paper or briefly on what exactly the research is about
    ▪ Objective of the research
  o Literature Review
    ▪ Must include related theories/models or other related sources to the topic being discussed
    ▪ Your Literature Review must consist of theories/models related to your identified problem
    ▪ You are encouraged to use any other sources to write your Literature Review (please do not depend too much on your module).
  o Results and Discussion
    ▪ Report the results
    ▪ Divide your work using sub-headings which clearly identify the parts being discussed/reported
  o Conclusion
    ▪ Overview/summarises the whole report
    ▪ Provide recommendations/suggestions if necessary to improve practice
  o References
    ▪ Using the latest edition of the APA Style
    ▪ The more sources that you refer to the better. You are advised not to use too many sources from the internet. Journals and books are much more recommended
UNIT 1

INTRODUCTION

Learning Objectives

1. Define the meaning of administration and management
2. Explain the differences between administration and management
3. Identify the functions and usage of administration and management

Differences Between Administration and Management

According to Theo Haimann, “Administration means overall determination of policies, setting of major objectives, the identification of general purposes and laying down of broad programmes and projects”. It refers to the activities of higher level. It lays down basic principles of the enterprise. According to Newman, “Administration means guidance, leadership & control of the efforts of the groups towards some common goals”.

Whereas, management involves conceiving, initiating and bringing together the various elements; coordinating, actuating, integrating the diverse organizational components while sustaining the viability of the organization towards some pre-determined goals. In other words, it is an art of getting things done through & with the people in formally organized groups.

Management vs Administration

Administration is the top level, whereas management is a middle level activity. If one were to decide the status, or position of administration, one would find that it consists of owners who invest the capital, and receive profits from an organization. Management consists of a group of managerial persons, who leverage their specialist skills to fulfill the objectives of an organization.

Administrators are usually found in government, military, religious and educational organizations. Management is used by business enterprises. The decisions of an administration are shaped by public opinion, government policies, and social and religious factors, whereas management decisions are shaped by the values, opinions and beliefs of the managers.

In administration, the planning and organizing of functions are the key factors, whereas, so far as management is concerned, it involves motivating and controlling functions. When it comes to the type of abilities required by an administrator, one needs administrative qualities, rather than technical qualities. In management, technical abilities and human relation management abilities are crucial. Administration is perhaps both an art and a science. This is because administrators are ultimately judged by their performance. Administration must incorporate both leadership and vision.
Management deals with the employees. Administration is above management, and exercises control over the finance and licensing of an organization.

The difference between Management and Administration can be summarized under 2 categories:

1. **Functions**
2. **Usage / Applicability**

### On the Basis of Functions: -

<table>
<thead>
<tr>
<th>Basis</th>
<th>Management</th>
<th>Administration</th>
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<tbody>
<tr>
<td>Meaning</td>
<td>Management is an art of getting things done through others by directing their efforts towards achievement of pre-determined goals.</td>
<td>It is concerned with formulation of broad objectives, plans &amp; policies.</td>
</tr>
<tr>
<td>Nature</td>
<td>Management is an executing function.</td>
<td>Administration is a decision-making function.</td>
</tr>
<tr>
<td>Process</td>
<td>Management decides who should as it &amp; how should he dot it.</td>
<td>Administration decides what is to be done &amp; when it is to be done.</td>
</tr>
<tr>
<td>Function</td>
<td>Management is a doing function because managers get work done under their supervision.</td>
<td>Administration is a thinking function because plans &amp; policies are determined under it.</td>
</tr>
<tr>
<td>Skills</td>
<td>Technical and Human skills</td>
<td>Conceptual and Human skills</td>
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<tr>
<td>Level</td>
<td>Middle &amp; lower level function</td>
<td>Top level function</td>
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### On the Basis of Usage: -

<table>
<thead>
<tr>
<th>Basis</th>
<th>Management</th>
<th>Administration</th>
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<tbody>
<tr>
<td>Applicability</td>
<td>It is applicable to business concerns i.e. profit-making organization.</td>
<td>It is applicable to non-business concerns i.e. clubs, schools, hospitals etc.</td>
</tr>
<tr>
<td>Influence</td>
<td>The management decisions are influenced by the values, opinions, beliefs &amp; decisions of the managers.</td>
<td>The administration is influenced by public opinion, govt. policies, religious organizations, customs etc.</td>
</tr>
<tr>
<td>Status</td>
<td>Management constitutes the employees of the organization who are paid remuneration (in the form of salaries &amp; wages).</td>
<td>Administration represents owners of the enterprise who earn return on their capital invested &amp; profits in the form of dividend.</td>
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</table>
Practically, there is no difference between management & administration. Every manager is concerned with both - administrative management function and operative management function as shown in the figure. However, the managers who are higher up in the hierarchy denote more time on administrative function & the lower level denote more time on directing and controlling worker's performance i.e. management. Administrators are mainly found in government, military, educational organizations. Management is used by business enterprise. The Figure above clearly shows the degree of administration and management performed by the different levels of management.

Figure 1: The degree of administration and management performed by the different levels of management
UNIT 2

THE WORKPLACE- CONSTANTLY CHANGING

Learning Objectives

1. Identify changes that are occurring in the workplace.
2. Define common types of businesses and organizational structures.
3. Explain crucial skills and qualities of an effective administrative professional.

This unit introduces students to the dynamic workplace and the impact of economic globalization, changing technology, and workplace diversity on the administrative professional. Job outlook, job titles, and employment by specialty area are included. Workplace organization including the types of business organizations, organizational structure, and organizational culture is presented. Qualifications of an effective administrative professional and qualities necessary for success are provided.

1. The effect of changing technology on the job responsibilities of the administrative professional

Advances in technology have made it possible to conduct business across the globe almost instantly, and reliance on technology continues to expand. Due to technological advances, administrative professionals are able to accomplish more work in the same amount of time. This allows many administrative professionals to assume responsibilities once reserved for management, including providing training and support for new administrative professionals and supervising administrative professionals.

2. The job outlook for the administrative professional

Administrative assistant as one of the largest occupations and it is among those expected to add the largest numbers of new jobs in the coming years. This growth is expected because the roles of administrative professionals are expanding and because administrative professionals work in areas of the economy that are expanding.

3. The important of organizational culture when seeking an administrative support position

Although organizational culture is sometimes difficult to define in words, you can learn about the culture by observing the way people dress and how individuals interact with one another. A business with a healthy organizational culture is typically a more rewarding place to work. Employees are usually more productive and efficient. Try to find an organization with a culture that closely matches your own ethical values and standards.
4. Necessary skills for a successful administrative professional

(a) Communication. Communication takes the form of e-mails, letters, memos, reports, faxes, voice mail messages, telephone calls, written and verbal presentations, and one-on-one conversations. You must be able to express yourself accurately and concisely in written communications and be clear, tactful, and straightforward in verbal communications.

(b) Interpersonal relations. You will interact with many people as an administrative professional. To do so successfully, you need to be sensitive and accepting of their needs, cultures, and diverse backgrounds.

(c) Time management. You will need to organize your time, calendar, paper records, and electronic files so work flows smoothly and tasks are finished on time.

(d) Critical thinking. Think critically about the issues facing you. This can save you time and make you more productive.

(e) Decision making. As an administrative professional, you will make decisions daily. Use a decision-making process to help you make effective decisions.

(f) Creative thinking. Creativity is the ability to produce new ideas and to be original and imaginative. Use more than one method or set of rules for getting a job done.

(g) Teamwork. Successful teamwork skills demand you understand, accept, and respect the differences among your team members. To be successful you must also treat all members courteously, build relationships with team members, learn collectively with the team, and take responsibility for producing high-quality work.

(h) Technology. You must be competent and current in your knowledge of technology as it applies to your job and your skills in using it. You must be proficient with computers, current software, and telecommunications and wireless technologies; capable in researching on the Internet; competent in using office equipment; and willing to research and use new workplace technology.

(i) Leadership. Seek out and accept opportunities that allow you to practice leadership. Evaluate your performance as a leader.

(j) Stress management. Stress can cause serious health problems and can affect your work. You need to understand how to manage your time so you do not become ill or chronically stressed.

(k) Problem solving. Understanding and implementing a problem-solving process will help you find appropriate solutions to problems you may encounter.

(l) Customer focus. You must understand the importance of demonstrating a positive customer focus in all your actions. Showing respect for customers, seeking customer input, and going the extra mile to maintain good relationships are all strategies that demonstrate
customer focus.

5. The important of confidentiality

Confidentiality means the ability to receive and keep certain information private. You must think carefully about what you say to others within and outside the organization about the information you have available to you. To share confidential information can cause irreparable harm to your organization, supervisor, coworkers, patients, clients, and customers.
UNIT 3

STRESS AND TIME MANAGEMENT

Learning Objectives

1. Apply appropriate techniques for managing yourself in the work environment.
2. Understand and apply appropriate techniques for managing stress.
3. Describe strategies for managing your work.

This unit discusses the value of managing yourself by setting long-term and short-term goals, aligning and adjusting your goals as needed, and staying motivated to achieve goals. It emphasizes the importance of taking care of yourself by maintaining your physical health and energy, managing relationships, and balancing work and home. Understanding types of stress and tips for preventing and coping with stress are included. The unit concludes with a discussion of strategies for managing your workspace, conducting a time audit, planning and organizing assignments, and making the best use of your time.

1. The important of setting goals and priorities

Setting clear, attainable goals is a key to success in your private life as well as your work life, and each helps to support the other. You need to clarify the results you are seeking and focus on exactly what you want to accomplish before you can figure out how to get the desired results.

2. Strategies to remain motivated to achieve goals

Stopping to measure your progress can encourage you to stay on track. Reward yourself as you achieve your short-term goals, and use incentives to help you move forward toward achieving the next goal. Resist, avoid, and minimize interference (anything that stands in the way of progress). Take advantage of opportunities to increase your skills and knowledge or to build your professional network as they arise.

3. The benefits of a healthful diet and three benefits of exercise

A healthful diet can help you feel well, reach your ideal weight, or maintain it. In addition, a healthful diet reduces the risk of developing certain health or medical problems. It is also essential in the management of many diseases. Exercise reduces the risk of developing certain health-related problems; contributes to healthy bones, muscles, and joints; promotes better balance; helps relieve arthritis pain; reduces symptoms of anxiety and depression; and decreases the need for hospitalizations, physician visits, and medications.
4. Definition of stress and ways to cope with stress

Stress as the worry and anxiety you feel when you react to pressure from others or yourself.

Ways of dealing with stress:
• Use visualization.
• Relax. Set aside time each day to do something you enjoy.
• Use positive self-talk.
• Walk away.
• Talk to friends or family members
• Solve the problem

5. Strategies for managing work

• Adopt a planning system.
• Set priorities.
• Avoid procrastination.
• Handle paper and e-mail.
• Streamline tasks.
• Manage large projects.
• Handle time wasters such as chatter, interruptions, and disorganization.

Steps to take to prevent and cope with stress:

• Maintain your physical health and energy. Take the time to make healthy eating choices, adopt an exercise program, and get enough sleep.

• Manage your relationships. Think about what you can do to alleviate some of the stress with your roommates. Make a list of tasks that need to be completed. Take turns.

• Develop coping strategies for dealing with the stress. Use visualization, relax, use positive self-talk, or walk away. Solve problems as they occur.

• Manage your work. Conduct a time audit to understand how you spend your time so you can make effective choices about it.

• Plan and organize assignments. Adopt a paper or electronic planning system to keep track of tasks and appointments and set priorities.

• Adopt effective task management strategies including avoiding procrastination, handling paper and e-mail, streamlining tasks, and managing large projects.

• Handle time wasters effectively including chatting, interruptions, and disorganization.
UNIT 4
ETHICAL THEORIES AND BEHAVIOUR

Learning Objectives

1. Understand the basics of ethics and consider the importance of ethical behavior in the workplace.
2. Identify characteristics of an ethical organization.
3. Identify characteristics of an ethical administrative professional.

This unit focuses on how to work ethically as an administrative professional. The first section introduces business ethics and basic ethical concepts and terms. The second section describes seven characteristics of ethical organizations that students can use to assess potential employers. The unit closes with a discussion of characteristics of ethical administrative professionals, such as confidentiality, honesty, and loyalty.

1. Definition of ethics

Ethics is the standards that help a person determine right from wrong.

2. The characteristics of an ethical organization

• Environmental responsibility: An environmentally responsible organization shows a commitment to environmental concerns above and beyond what is legally required.

• Global awareness: Globally aware organizations avoid doing business with countries or companies with poor ethical records or use their influence as customers to effect change.

• Organizational commitment to ethical behavior: Organizations with this commitment have a strong ethical culture, which is evident in such facets as rewards and punishments and policies and procedures.

• Honesty. An ethical organization is honest when dealing with employees and other organizations and individuals.

• Commitment to diversity and nondiscrimination. Ethical organizations are committed to diversity, which they develop through affirmative action programs comprising recruitment, hiring, promotions, and other activities. An ethical organization believes in treating all individuals equally; it may prohibit types of discrimination in addition to those proscribed by law.

• Commitment to the community: Ethical organizations recognize a social responsibility to
contribute to the community, which they demonstrate through activities such as contributing to charities and participating in service organizations.

• Commitment to employees: Ethical organizations are fair to employees and treat them well.

3. Definition of sexual harassment

Sexual harassment is sexual conduct that is unwelcome by the recipient and that may be either physical or verbal in nature.

Federal law prohibits employers from discriminating based on race or color, gender, religious beliefs, national origin, disability, age, or genetic information.

4. Is discrimination ever ethical?

The act of discriminating means to make a distinction. Individuals constantly discriminate by choosing one option over another, such as choosing one car over another or one activity over another. That type of discrimination is not unethical since it is merely a personal preference. In the workplace, discrimination may sometimes be appropriate. Employers frequently discriminate based on skill. For example, an applicant with a welder’s license may be hired over an applicant without that license. This is not an unethical discrimination.

5. The characteristics of an ethical administrative professional

• Committed to ethical behavior. Ethical administrative professionals demonstrate a commitment to honesty, concern for society, and respect for others’ rights.

• Refusal to engage in negative workplace politics. Ethical administrative professionals don’t use workplace politics to further their own personal interests. They don’t take part in inappropriate activities or gossip.

• Trustworthy with confidential information. Ethical administrative professionals guard the confidentiality of company, customer, and client information, both information that is legally protected and information for which an assumption of privacy exists.

• Honesty. Honest administrative professionals refrain from white lies, are truthful in time reports and other documents, do not take organizational supplies and equipment for personal use, and avoid spending company time on personal endeavors.

• Loyalty. Ethical employees are loyal to the company, not to inappropriate actions but to directions that support its values. They are team players.
UNIT 5

WORKPLACE TEAM AND ENVIRONMENT

Learning Objectives

1. Develop an understanding of teamwork.
2. Develop an understanding of workplace team composition.
3. Describe the characteristics of effective workplace teams.
4. Discuss productive team communication.

This unit introduces teams and teamwork. It discusses the basic benefits of teams from an organizational viewpoint as well as for employees. Six fundamental types of teams are defined and explained. Methods of interacting and communicating successfully with diverse people are suggested. Tasks of team leaders are outlined, and methods for leading a team are recommended. The unit describes responsibilities of team members and lists actions and attitudes for effectiveness in this role. Fundamental teamwork techniques are presented. The unit closes with a discussion of team communication, including formal and informal communication channels and application of interpersonal skills to team environments.

1. The types of teams and its purpose

• Project teams are developed for a clearly defined project with a beginning and an end.

• Committees are set up to solve a problem, monitor an issue, or complete a task. They may be ongoing or have a definitive end.

• Cross-functional teams are composed of individuals from a number of different functional groups within an organization. They are typically brought together temporarily to solve a problem or work on a project that requires their expertise.

• Administrative professionals form teams with supervisors and coworkers.

• External teams are formed when individuals within an organization work with individuals outside the organization to achieve specified goals.

• Virtual teams primarily meet electronically and cross the boundaries of time and distance to operate. People often connect them with national and international companies, but virtual teams are also used across regions, states, or even counties or cities.
2. The benefits to you as well as an organization when teams are used

Benefits to you: You will gain insights, ideas, help, information, and more from team members. In addition, you may be cross-trained on different tasks. You will learn new skills that can make your job more interesting, can improve your performance, and can be useful in your career. You will improve your problem-solving skills and gain a new perspective on the tasks others perform. Seeing the big picture and learning about the organization as a whole will help you in your job. You will get deep enjoyment and satisfaction from being on a successful team.

Benefits to an organization: Teams bring together skills and experiences that exceed those of an individual. Studies show that effective teamwork increases worker productivity, decreases absenteeism, produces higher-quality products and services, and increases profits. Employees serving on effective teams enjoy having greater responsibility and being able to contribute to the organization in a “bigger” or different way. As a consequence, they may have more job satisfaction, perform better, and be more likely to stay with the company.

3. Characteristics of a good team leader

A good team leader should be responsible, be trustworthy, have excellent organizational skills, and have strong verbal and written communication skills. He or she should be ready and able to set a good example for team members. Excellent interpersonal relations skills are also required.

4. Characteristics of a good team member

A good team member should always be on time for meetings, should be prepared for them, should do the work the team assigns to the best of his or her ability, and should be willing to contribute to meetings and to the work of the team.

5. An effective team

An effective team has the following characteristics:
• Individual members who focus on team goals rather than personal goals
• Good leadership
• Members with the skills, experience, and education to do the job
• Individual members who take responsibility for the success or failure of the team
• The ability to work with a diverse group of people
• The capacity to reach an agreement when making decisions
• Goals that are practical and well defined
• Members who respect and trust one another
6. Fundamental techniques for good teamwork

• Be respectful toward others.
• Avoid making judgments based on your personal belief system.
• Look at issues from other people’s perspectives.
• Be flexible, or able to change when faced with a new situation.
• Listen in such a way as to fully understand what others are saying.
UNIT 6

COMMUNICATION AND PRESENTATIONS

Learning Objectives

1. Identify elements of effective verbal communication.
2. Examine elements of nonverbal communication.
3. Describe effective techniques for telephone communication.
4. Prepare effective written communications using the “C” characteristics.
5. Understand how people communicate globally.
6. Examine technology etiquette for the administrative professional.

This unit deals with the important topic of effective verbal communication. The first part of the unit focuses on developing the ability to listen carefully to others, the skills to carry on an effective conversation, an awareness of the importance of nonverbal communication for oneself and others, and the ability to speak articulately. The “Telephone Communication” section thoroughly covers essential telephone skills such as answering appropriately, screening calls, managing calls on hold, transferring calls, and speaking effectively when placing calls and leaving messages. The other part of the unit is devoted to key aspects of preparing effective communication using the “C” characteristics. This unit also provides an overview of telecommunication technologies students are likely to use or encounter in the workplace, describing them and explaining ways administrative professionals are likely to use them. Topics include mobile devices such as intelligent mobile hotspots and mobile apps, business and professional uses of social networking sites, and cloud computing. The unit then turns to the topics of security threats to computers and identity theft. It closes with a brief discussion of etiquette for mobile phones, instant messaging, and e-mail.

1. Be an active listener

Listening actively means making a conscious effort to understand. The following are the tips to be an active listener:

• Try to maintain eye contact with the speaker. Respond occasionally with remarks like “I see.”

• Do not think about what you are going to say next or would say if you were the speaker.

• Do not interrupt.

• Try to discover the speaker’s main point(s).

• Be attentive to nonverbal communication, and listen for feelings as well as for words.

• Be aware of distractions.
• When possible, minimize distractions in the environment.
• Take notes on what the speaker is saying.
• When possible, ask for clarification if you do not understand.
• Change your body position if you find yourself getting distracted or bored.
• Practice the habit of listening.

2. The different between listening and hearing

Example: You may see a newspaper article and not read it. You may hear someone talking but not be listening to that person.

The majority of our time spent communicating is spent listening, so listening should be considered as important as speaking. Listening is also a skill that usually needs improving and often goes unaddressed in education.

3. The elements of a telephone personality

The elements of a positive telephone personality are as follows:

• Use a pleasant voice. Make your voice positive and full of energy and enthusiasm.
• Use the caller’s name.
• Use language effectively. Use correct English and pronunciation.
• Be helpful, yet discreet.
• Be attentive. Visualize the person, and focus on what he or she is saying.

4. Strategies to connect with the audience during a presentation

• Maintain eye contact with the audience.
• Watch for nonverbal communication.
• Use natural gestures.
• Be natural; do not perform.
• Speak loudly enough so everyone can hear you.

5. The “C” characteristics of effective writing

• Complete: Written communication is complete when it gives the reader all of the information he or she needs to accomplish the results the writer intended.
• Clear: Written communication is clear if the reader can determine (without a doubt) the
purpose of the correspondence after reading a message.

• Correct: Communication should be correct in every way. It should include the correct facts and information and should be objective. It should also be proofread carefully.

• Concise: Written communication is concise if it uses only as many well-chosen words as needed to convey the message.

• Courteous: Courteousness means treating the reader with respect and demonstrating that you care about the reader.

• Considerate: A considerate message is positive, even when saying no.

6. The different types of approaches that may be used in business writing

• Direct approach: Appropriate for positive or neutral messages that deliver good news or make a routine request. The direct approach begins with the reason for the message, followed by supporting details if needed. It closes with a courteous thank-you for an action taken or a request for action by a specific time.

• Indirect approach: Used for messages that give negative news. The indirect approach begins with an opening statement that is pleasant but neutral. Next, it reviews the circumstances and gives the negative information. The message closes on a pleasant and positive note.

• Persuasive approach: Used when you want to convince someone to do something or change an indifferent or negative reader’s reaction. The message begins by getting the reader’s attention quickly. It continues by creating interest and desire and closes by asking for the desired action.

7. Principles when writing for international audiences

• Use relatively formal language.
• Be certain you understand the order of first and last names.
• Do not use humor; it may be misunderstood.
• Use the dictionary meanings of words; do not use slang.
• Be courteous; use thank you and please often.
• Be complimentary when appropriate but do not be excessive in your comments.
• Avoid asking questions that can be answered yes or no.
• Ask questions tactfully.
• Respect all customs of the country.
• Learn all you can about countries your organization interacts with; read extensively.
8. Guidelines to follow when preparing e-mail

• Be appropriately formal.
• Write a descriptive subject line for all messages.
• Limit your message to one screen.
• Edit and proofread carefully.
• Include your name and title (if appropriate) when replying to an e-mail.
• Be wary of humor or sarcasm.
• When forwarding messages, key your comments at the top.

9. Portability in computer technology could be helpful in business

Generally, it enables employees to be more productive and mobile and to stay connected to the office while away from it. For example, with a tablet and an intelligent mobile hotspot, or a smartphone and mobile apps, employees can work nearly anywhere, can distribute and access information in almost any form, and often can connect seamlessly from one application to another.

10. How to keep a smartphone safe while at work?

• Create a password for access to your phone, and keep your phone locked.
• Have good, reliable antivirus protection.
• If possible, use a remote wipeout service so you can delete the contents of your phone if it is stolen.
• Treat your smartphone as if it were a wallet or purse—don’t leave it lying around. Keep it locked in a drawer or on your person.

11. Can social networks be used for business?

Yes. As an example, an administrative professional might use a professional networking site such as LinkedIn to maintain a network of business contacts and to look for additional business opportunities. The lines between personal and professional networking frequently overlap. For example, individuals use Facebook for both personal and professional purposes, and businesses use it as well. Because of this, administrative professionals must always consider the professional image they portray, including taking great care in choosing the information they disclose or do not disclose on social networking sites.

12. The difference between a computer virus and a worm. The difference between adware and spyware.

A computer virus is a malicious program that attaches itself to files or software in order to spread to other files or programs. It cannot be spread to a computer unless a user opens a file or runs a program that has the virus attached. A worm is a malicious, self-replicating
program that, unlike a virus, does not need human interaction to multiply.

Adware is software that displays advertising. Most adware can also be considered spyware because, once installed on your computer, it tracks the websites you view and collects information about you.

13. Ways to protect files and identity

You can protect your files by having reputable antivirus software that also provides spyware protection, keeping the software up-to-date, and scheduling complete system scans regularly. You should also use a firewall. It is important to back up important information regularly and to carefully store the backup copy.

Steps for keeping your computer and data secure:
• Make sure your e-mail program is not set to open attachments automatically.
• Only click links or open attachments in e-mail from people you know.
• Never respond to an e-mail that asks for your password or user ID.
• Don’t save e-mail that contains sensitive information.
• Empty your trash and sent folders periodically.
• Be very selective about what you download.
• Use effective passwords.
• Log off your computer or network, or lock your computer before leaving your desk.

Steps to protect your identity:
• Never respond to e-mails requesting personal information.
• Do not click a link in a suspect message.
• Use effective passwords.
• Obtain a personal credit check periodically.

14. Proper etiquette to follow when using a mobile phone in public

• Maintain ringer settings that are as low as possible.
• Turn your cell phone off or use vibrate or silent settings when attending an event.
• When in a meeting, do not use your cell phone to read or send e-mail, text, or play games.
• Make calls only when absolutely necessary when in public places.
• If an expected call cannot be avoided, alert your companions ahead of time and excuse yourself when the call comes. If you are in a meeting, set the phone to vibrate, and sit near the door so you can leave quietly.
• Keep your phone voice as low as possible.
• Keep calls short if you are with someone else.
• Do not discuss private matters or sensitive topics unless you are in private.
• If you walk and talk on your mobile phone, be aware of your surroundings, and respect the rights of others.
UNIT 7
RECORDS AND FINANCIAL MANAGEMENT

Learning Objectives

1. Understand the importance of managing records.
2. Describe the types of records storage systems.
3. Describe records categories and the processes for records retention, transfer, and disposal.
4. Describe the costs and benefits of credit.
5. Understand and prepare organizational financial statements.

This unit discusses methods of managing paper records. It explains the value of records to the organization and the necessity for records to be findable, confidential, and safe. The unit describes equipment and supplies used in filing and procedures to help ensure a record is filed properly. An electronic record is defined as a record stored on electronic storage media that can be accessed or changed. The unit provides guidance for organizing files on the computer and a detailed introduction to databases. It outlines a system for managing image files. The unit also provides with a discussion of records retention, transfer, and disposal. The following section discusses credit, credit cards, and managing credit. The unit closes by introducing three types of financial statements that administrative professionals frequently need to prepare: a balance sheet, an income statement, and a cash flow statement.

1. In what ways may a record have value for an organization?

A record may have legal, financial, historical, or day-to-day operational value.

2. Factors that must be considered when planning an effective records system, and the importance of each factor

The factors are findability, confidentiality, and safety.

• Findability is important because if a record cannot be located when needed, it has no value.

• Confidentiality is important because business records include confidential information of employees, clients, and customers the disclosure of which could be damaging or disastrous.

• Safety is important because many records are irreplaceable and others can be replaced only at considerable cost or inconvenience.
3. The difference between the indexing and coding filing procedures

Indexing is the process of determining the filing segment to be used in storing the file—the name, subject, number, or geographic location by which the record will be stored and requested. Coding is the process of marking the record to indicate the filing segment and indexing units.

4. The purpose of a general folder in an alphabetic filing system

A general folder holds records for which no individual folder has been prepared. For example, if a coded name begins with A (Andrew’s Printing) and there is no individual folder for the name, the record is filed in the A general folder. When three or four records related to the same name or organization accumulate in the general folder, a specific folder for those records is prepared.

5. Advantageous for an organization to use a numeric filing system

A numeric filing system is particularly useful to organizations that must maintain confidentiality of their records. Other advantages of this system include easy, unlimited expansion; all records for one name being located in the same place; and enhanced accuracy because numbers are easier to recognize and sequence than alphabetic characters.

6. Types of electronic records in business

The three types of records are automated records, which are created and distributed electronically; individual records, such as word processing and database files; and database records. An example of an automated record is an order entered by a customer online using an automated order system. An example of an individual record is a spreadsheet budget file. An example of a database record is a customer record.

7. Phases of the life cycle for an electronic record

• Creation and storage: This phase consists of the creation of the record and its storage on a network, hard drive, or other storage device.

• Use and distribution: This phase consists of the use of the information in the record to answer questions, make decisions, compile data, or complete other activities and its distribution through electronic channels such as e-mail or shared folders on a network or on removable storage devices such as DVDs or flash drives.

• Maintenance: During this phase, the record may be moved to another location, copied, or backed up.
• Disposition: Disposition is the act of retaining or destroying a record after a period of time. Data migration and deleting files are two examples of disposition methods.

8. Suggestions for creating effective filenames

• Avoid special characters (\ / : * ? " < > | [ ] & $ , ).
• Use underscores instead of periods.
• Use underscores instead of spaces.
• Make each filename unique and independent from its location.
• Indicate versions when appropriate.
• If you use dates as part of a filename, format them consistently for all your documents.
• Rename files you receive from others to fit your naming conventions.

9. How are documents prepared for storage in an image system?

The process can involve many of the following steps:

• Remove the documents from file cabinets or other storage areas and organize them in the correct sequence.

• Review the records and remove all duplicate and obsolete information.

• Check all documents carefully. Unfold and flatten all papers. Remove paper clips, staples, and rubber bands. Mend torn pages. Remove unnecessary envelopes, sticky notes, and routing slips.

• Replace taped, brittle, or thin sheets of paper with copies so a jam does not occur when scanning.

10. How can a database help an organization manage employee information?

Within the database, the organization can set up employee information in separate tables linked by a primary key, such as an employee ID number. There might be separate tables for contact information, salary information, department, sales performance, and so forth.

11. The issues that should be considered when developing a retention schedule.

• Use. How long does the organization require the use of the records?

• Inactivity. At what point should records be declared inactive? Should inactive records be transferred to low-cost storage, or should they be destroyed?
• Laws and regulations. What federal, state, and local requirements for keeping records must be followed?

• Cost. What is the cost of keeping records versus the cost of not keeping them?

• Off-site storage. Which records should be transferred to a less expensive or more secure storage location away from the central offices?

• Integrity and security. Will transferred records maintain their integrity so specific records can be located when needed? Will transferred records be protected properly from destruction and unauthorized use?

12. Factors should be considered in preparing a financial plan

In making a financial plan, you should consider your personal goals and then determine the steps needed to meet them. You should also consider your current financial situation: assets, debt, current income, and other expenses. You should consider how you will plan your spending and saving now so you can meet your personal financial goals in the future.

13. Some ways to begin planning for retirement.

a. Examine your finances. Determine how much you can save or invest toward retirement now.

b. Think about the lifestyle you want in retirement.

c. Look at your current living expenses, and estimate an amount for living expenses after retirement.

d. Establish an investment plan for your working years to generate the income you will need in retirement.

e. Evaluate your plan each year to be sure it is still financially sound. Revise it as your circumstances and goals change.

14. The difference between a stock and a bond

A stock is a share of ownership in a company. A bond is basically a loan a buyer makes to a bond issuer, such as a corporation, federal government agency, state, county, city, or town.
15. What is a mutual fund?

A mutual fund is an investment fund that consists of stocks, bonds, and other investments focused on a particular investment strategy.

16. What should you do if you find an error on your credit card statement?

You should call the credit card company and follow up with a detailed letter. Include your name, contact information, account number, and details of the disputed charge. Use the address for billing inquiries, which is often not the same as the payment address. Send the letter by certified mail, return receipt requested, within 60 days of receiving the inaccurate statement. Enclose copies of your receipt and any other documents that support your position. Keep the originals, along with a copy of your letter. For any telephone contacts, make notes of the date, the person’s name, and what was said.

17. Ways you can avoid getting into financial trouble

Some examples are setting financial goals, making realistic choices when spending money or going into debt, having a budget, living on less than you earn, keeping debt to a minimum, saving money each month, having an emergency fund, and keeping track of what you are spending.

18. The purpose of an income statement, balance sheet, and cash flow statement?

An income statement shows the income, expenses, and profit or loss of an organization for a given period of time. It is typically prepared for each month and for the fiscal year.

A balance sheet shows an organization’s assets, liabilities, and owner’s equity at a given point in time—how much the company owns and how much it owes.

A cash flow statement shows incoming and outgoing cash for a given period. Keeping track of cash flow is important so the company has enough cash on hand to fund its payroll and pay other bills.

These statements are typically created monthly or as needed.
UNIT 8
EFFECTIVE MEETINGS AND CONFERENCE

Learning Objectives

1. Describe the variety of meeting types and delivery formats.
2. Describe meeting roles and responsibilities of executives, leaders, administrative professionals, and participants.
3. Identify considerations for an effective conference or convention.

This unit lists the qualities of effective meetings and appropriate reasons for calling a meeting. It describes common types of workplace meetings and discusses the roles and responsibilities of the executive, leader, administrative professional, and participants in making a meeting successful. The unit closes with a brief section on conferences and conventions and the administrative professional’s responsibilities before, during, and after these events.

1. The characteristics of an effective meeting

• There is a definite need for the meeting.
• The purpose is stated clearly and understood by all participants.
• The appropriate people attend.
• An agenda is prepared and followed.
• All members participate.

2. What items should be considered when deciding on a meeting delivery format?

Face-to-face meetings continue to be used extensively in business and have a number of advantages. However, time and money may dictate that a meeting take place electronically rather than face-to-face. An audio conference is a good choice for a meeting on short notice; another advantage of this format is that the technology is readily available to almost everyone. When visual input is needed, a video conference can be used. Webcasts are useful as an online presentation tool. Webinars provide some limited opportunities for interaction; web meetings provide more.

3. The meeting responsibilities of the executive

The executive’s responsibilities are to determine the purpose and objectives of the meeting, to select the participants, and to plan the agenda.
4. Why is an agenda so important?

The agenda lists the topics to be discussed at the meeting and provides other essential information for the meeting leader and participants. A well-planned agenda saves time and increases productivity.

5. The components of an effective agenda

An effective agenda includes the following information:
• Name of the group, department, or committee
• Date and time of the meeting
• Location of the meeting
• Items to be discussed, in order of presentation
• Names of individuals responsible for presenting each agenda item
• Background materials (if needed)

6. The meeting responsibilities of the administrative professional

Before the meeting. The administrative professional confirms the meeting and prepares the agenda. He or she may also be responsible for making seating arrangements, ordering equipment, and ordering food and beverages. Often the administrative professional prepares materials for the meeting leader and attendees. The administrative professional also makes a final check of the room just before the meeting.

During the meeting. The administrative professional may be expected to greet guests and introduce them to other participants. The main responsibility, however, will probably be to take the minutes.

After the meeting. The administrative professional has a number of responsibilities related to returning the meeting room to its original state. In addition, he or she will need to send any necessary follow-up messages, make calendar notes on items needing future attention, evaluate the meeting, and temporarily retain notes on the meeting.

7. Why are seating arrangements so important in meeting preparations?

Choosing the right seating arrangement can contribute to achieving the meeting objectives. For example, the rectangular arrangement allows the leader to maintain control since he or she sits at the end of the table. Circular and oval arrangements encourage collaboration.
8. The purpose of meeting minutes

The minutes are a written record of the meeting. They document the important matters that were presented and the decisions that were made, and they remind participants of what they must do before the next meeting.

9. How do meeting participants play a role in the success of a meeting?

Meeting participants play a very important role in the success of a meeting by coming to it prepared, on time, and ready to contribute. Actions such as listening without judging, participating responsibly without dominating the discussion, giving their full attention to the meeting, and contributing in a positive manner also help to make the meeting a success.

10. Typical responsibilities of an administrative professional when planning a conference

Two of the most important considerations are to determine the location and to arrange for meeting facilities. The administrative professional may contact presenters to make travel and lodging arrangements. He or she might select refreshments or plan a meal. In addition, he or she might be responsible for designing the online registration process and may be involved in preparing packets of information for registrants.

11. When would it be appropriate to hire event planners, and what types of responsibilities would they handle?

A company may hire an event planner to coordinate the details of a large meeting or conference. The text lists these typical responsibilities of meeting planners:

- Determine and arrange for the meeting location.
- Handle lodging arrangements.
- Coordinate transportation to the meeting site for participants.
- Plan meals and other food and beverage distribution.
- Arrange all forms of electronic communication.
- Arrange presentation technology and audiovisual equipment.
- Select and hire entertainment or speakers.
- Assign exhibit space and work.
UNIT 9
TRAVEL ARRANGEMENT

Learning Objectives

1. Understand how to make domestic travel arrangements.
2. Understand how to make international travel arrangements.
3. Implement organizational travel procedures.

This unit covers various arrangements administrative professionals may need to make for executives traveling domestically or internationally, including air travel; ground, car, and rail travel; and hotels. It outlines special concerns for international trips, such as cultural differences, passports and visas, health documents and precautions, and foreign currency. The unit discusses typical tasks such as scheduling appointments and meetings, preparing and organizing materials, and determining procedures to follow in the executive’s absence. It explains how to create an itinerary and an expense report.

1. Flight classifications most commonly used for domestic travel

The three flight classifications are first class; business class; and economy, couch, or tourist class.

First-class accommodations are the most expensive and luxurious, and they provide the highest level of services.

Business class falls between first class and economy class. It is typically offered on long-distance flights such as those between New York and cities on the West Coast. Business services such as laptop power ports and wireless Internet access may be available.

Economy-class accommodations are typically the lowest-priced seats on the airplane. Fewer flight attendants are available to serve the needs of passengers.

2. Ways to obtain a boarding pass

Passengers may present their e-ticket information at an airport ticket counter; enter it at a self-serve kiosk near the ticket counter; check in online, printing the boarding pass themselves; or go paperless with a smartphone app that displays the boarding pass (not available at every airport).
3. Security measures that passengers are requested to follow in an airport

- Watch your bags and personal belongings at all times.
- Do not accept packages from strangers.
- Report unattended bags or packages to airport security.
- Report suspicious activities and individuals to airport security.
- Know and be ready to comply with screening procedures.

4. Guides for business etiquette in foreign countries

- Consulates of the country to be visited
- Travel books
- Seminars and short courses
- The Internet

5. The difference between a passport and a visa?

A passport is an official government document that certifies the identity and citizenship of an individual and grants the person permission to travel abroad. A visa is an approval granted by a government that permits a traveler to enter and in some cases to travel within that particular country.

6. How may an administrative professional assist executives with travel arrangements?

- Determining passport and visa requirements
- Checking on currency needs
- Researching health issues and business etiquette in the country to be visited
- Making flight and hotel reservations
- Arranging car rental
- Arranging rail transportation
- Preparing an itinerary
- Scheduling appointments and meetings
- Obtaining travel funds
- Preparing and organizing materials for the trip
- Determining procedures to follow in the executive’s absence
7. Some of the items that should be included on an itinerary

An itinerary should include the following items:

- Flights. Include flight numbers and times as well as the name of the airport and airline.
- Hotel. Include the name and address, telephone number, and confirmation number. It may also be helpful to include the type of room reserved, hotel amenities, and nearby restaurants.
- Rental car. Include the company name, telephone number, type of car, confirmation number, and directions to the rental office.
- Transportation. If the executive will use a transportation service, include the company name, telephone number, and confirmation number.
- Meetings or appointments. Include a contact name or number the traveler can call if he or she has questions or is delayed. Include driving directions if needed.

8. The responsibilities of the administrative professional when the executive is traveling

The administrative professional is responsible for handling workflow smoothly and efficiently. He or she is also responsible for making decisions and referring matters to others appropriately. A third responsibility is to handle correspondence, messages, and appointments.
UNIT 10

JOB SEARCH AND ADVANCEMENT

Learning Objectives

1. Analyze your skills, abilities, and interests.
2. Determine your job search plan.
4. Identify interview mistakes.
5. Develop skills for job advancement and job changes.

This unit prepares students to seek and obtain a job as an administrative professional. After assessing their skills, abilities, and interests, students learn about making a job search plan and resources for finding jobs, including strategies for a difficult economy. It emphasizes the usefulness of an online portfolio or personal website to showcase their capabilities. Much of the unit is devoted to the interview process, particularly how to be properly and thoroughly prepared. The unit closes with a brief section on starting strong in a new job and handling job changes.

1. What are some important considerations when you begin the job search?

Consider that you will spend many hours at a full-time job and need to find a position in which you can be happy and feel confident in your work. As you begin searching for a job, you should first understand your own skills, abilities, and interests.

2. Why networking is important?

Networking is one of the most effective strategies for finding a job. The process begins with finding individuals (such as friends, relatives, teachers, coworkers, or fellow students) who are willing to help you. You should question them on topics such as companies that are good places to work, companies that have openings, and other people you should be contacting. You should keep in touch with your network during the job search process.

3. What services do online recruitment sites provide?

Online recruitment sites allow you to browse job listings in a number of different ways. On some sites, you may also post your resume, and employers can list job openings and review resumes. These sites also provide a variety of other services.
4. Research an employer

You should research an employer to find out whether you would like to apply to the company and, once you have made that decision, to prepare for a job interview.

• What are the organization’s services or products?
• Is the organization multinational?
• Does it have branches in other states?
• What has been the profit picture of the organization for the past several years?
• Is the organization financially secure?
• Is it growing? What is the reputation of its chief executive officer?
• Does the organization have a good reputation in the community?
• Is there a good relationship between the employer and the employees?
• Is the organization an equal opportunity employer?
• Are there opportunities for advancement?

5. The difference between a functional resume and a chronological resume

A functional resume focuses on the skills and qualifications of an applicant for a particular job rather than on work experience. It is appropriate for someone who is entering a new field, just completing his or her education and beginning to seek full-time employment, or returning to work after a period of absence.

A chronological resume gives an applicant’s work experience in order with the most recent work experience listed first. This type of resume is the most common and most preferred. It works well for showing progress and growth if the jobs listed reflect increasing responsibility.

6. Some advantages of having an online portfolio

An online portfolio demonstrates your ability to use technology, specifically tools on the Internet. It is a way to showcase for potential employers what you are capable of producing.

7. Key elements are needed for success in the face-to-face interview

Key elements include researching the organization, preparing answers to likely questions, and practicing. Attention to personal appearance is also essential. During the interview, you should show genuine interest in what the interviewer is saying. Try to learn more about the prospective employer’s needs, and shape your replies and other remarks to show strongly that you can fill them. Describe relevant skills, abilities, and accomplishments, and provide good, solid examples from previous jobs, school, or extracurricular activities.
8. Some common interview mistakes

- Being late
- Not making eye contact
- Criticizing past employers
- Asking questions about salary and benefits immediately
- Not answering questions concisely
- Not asking questions
- Providing a resume with grammar and typographical errors
- Not having references available
- Not articulating interest in the position

9. When you begin a job, what are some things you can do to help ensure success?

- Maintain the same enthusiasm you had when you applied for the position.
- Listen to what coworkers and supervisors tell you.
- Learn from them and your experiences.
- Ask questions when you do not understand.
- Accept feedback gracefully.
- Observe and learn what is expected and accepted in your workplace.
- Pay attention to what is happening in the organization.
THANK YOU