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*INTEGRATED ASSIGNMENTS
IN SECRETARIAL, OFFICE
AND
BUSINESS PROCEDURES*

Donald C. McFetridge

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MACMILLAN

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For Garrett

**The names and addresses of all the people
and businesses in this book are invented, and
any resemblance to any actual person or
business is entirely coincidental.**

CONTENTS

<i>Acknowledgements</i>	xiv
<i>Notes for Teachers</i>	xv
<i>Matrix of Skills</i>	xxi
Assignment 1: Cumming, Cumming & Jones Ltd — Solicitors	1
Assignment 2: Purley, Wood & Associates plc — General Traders	9
Assignment 3: Ransome, Peters & Brownlees — Accountants	18
Assignment 4: Walker plc — Boatbuilders	26
Assignment 5: Peters & Jones plc — Consulting Engineers	35
Assignment 6: Dalzell & Arbuthnot plc — Architects and Interior Design Consultants	43
Assignment 7: Gerhardt Office Supplies plc	51
Assignment 8: Newport Gazette — Newspaper Telesales Office	60
Assignment 9: Graham, Muir & Allen — Dental Surgeons	66
Assignment 10: Party Planning — Party Planners	78
Assignment 11: Neat Concepts plc — Office Suppliers	90
Assignment 12: P J Green & Co — Travel Agents	97
Assignment 13: Pollock & Pollock — Advertising Specialists	105
Assignment 14: The Tribune Group Advertising Agency	115
Assignment 15: Greenwood & Goodwood plc — Wine Merchants	127
Assignment 16: S Patel Enterprises — Tobacconist & Confectioners	137
Assignment 17: National Hospital — Medical Records Office	147

Assignment 18: Bailey, Bailey & Mills plc — Publishers	154
Assignment 19: County Cars — Car Dealership	167
Assignment 20: Hayburn & Collins — Builders	173
Assignment 21: Morton, Turtle & Morton — Estate Agents	181
Assignment 22: Burnalls Fashions plc	187
Assignment 23: Beit Engineering plc — Engineering Company	194
Assignment 24: Rhythm Music Suppliers plc	207
Assignment 25: Pippa Fashions	220
Assignment 26: Alessandra Trading Company	232
Assignment 27: Stephenson & Wilson — Investment and Financial Consultants	245
Assignment 28: Grahams, Peters & Clarke plc — Personnel Office	260
Assignment 29: David Daniels Design — Interior Decorators and Designers	269
Assignment 30: Gemini Shipping plc	286
<i>Telephone Interruption List</i>	294

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Notes for Teachers

Have you ever wondered how you are going to cover all the different aspects of the courses you are required to teach (and which your students are following) which lead to the award of National Vocational Qualifications?

Much emphasis is currently placed on *competences* and abilities to perform a range of tasks or skills. The teaching of these skills is relatively simple and straightforward for the majority of us, but the testing of skills of any nature or kind is quite another matter altogether.

Realism

For this very reason I set about trying to design a series of assignments which would be as realistic as possible for those delivering courses in schools and colleges designed to lead to NVQs. It has, of course, always been extremely difficult to generate realism from paper-based tasks, particularly in the orthodox teaching/learning classroom situation. Therefore, for the assignments in this pack to work well and in order for the users to gain maximum benefit from them, an atmosphere more in tune with real life must be aimed for. This may, in part, be achieved by creating a mock-up or model of a training office or reception area, if such facilities do not already exist.

Each assignment is based in a specific company, for instance a builder's, an advertising company, a wine company, an investment company, a fashion company, a trading company, a retail outlet, etc. Therefore, students will have greater flexibility in choosing which assignments they would like to use. For instance, if a student thinks he or she might in the future like to work in the media, he or she could use the assignments in advertising, fashion and pop music, as these will be more meaningful for this purpose and, hopefully, be more interesting as well.

Presentation

Each assignment is set out in the following manner.

There is a reasonably comprehensive list of *skills* which will be tested in each assignment. While these lists are fairly well-defined, they are by no means exhaustive and the individual teacher/learner can adapt, abbreviate or expand the list of skills as and when required.

Also included is a list of *resources* required. This is useful for planning the assignments. However, it is suggested that teachers/lecturers should not become solely responsible for providing all the resources for every assignment. Students/learners should assume some responsibility for finding or locating and providing a variety of the more easily accessible resources required; information-seeking is a useful skill which students should be encouraged to develop. A fair number of back-up resources are already included in the pack, for instance, compliments slips, headed stationery, forms for completion, manuscripts, etc.

Perhaps the most important aspect of these assignments is the *scenario* or Background Company Information which paints a picture of the type, nature, size and personnel/staff of the company in which the assignment is based. When reading the scenarios, students will be expected to interpret and translate both implicit and explicit instructions, and they should be encouraged to bring to each assignment the ability to adapt, to be flexible and to be able to fit into different types of company.

Research

During the research stages of this work, the writer decided to update his own subject knowledge and skills and worked — thanks to Alfred Marks of Knightsbridge — as a temporary Executive Secretary in a wide variety of companies — a day here, a day there. One of the most important things which struck him during those very enjoyable weeks was the importance of being able to fit in with the people already working in the various companies. Even skills of 160 wpm in shorthand and 80 wpm in typewriting were not sufficient; a good secretary or clerical worker is expected to be able to interpret, translate and act on his or her own initiative and to be flexible.

Also included in each assignment is an *action list* or a *memo* giving a variety of in-tray-type tasks to be completed, and there is also a suggested timing guide or target time which can (and should where necessary) be adjusted, depending on the student/learner, the circumstances, the time in the year at which the assignment is being used, etc. These action lists give the students/learners a series of tasks to be completed, and frequently expect the students/learners to be able to prioritise — another skill which is required of the best secretaries and clerical workers. How often did the ability to do so come in useful during the writer's six weeks' experience in London offices!

Manuscripts and further lists of duties or tasks to be completed, if time permits, are also included as support or back-up materials, and students are expected to work their way through these in the order which they feel is most appropriate and sensible. Again, stress realism. The tone in each scenario and in the assignments in general is light and often leans towards the humorous; aim to encourage the students and learners to develop the ability to think themselves into the specific company situation and then show (or demonstrate for) them how they should react in certain circumstances.

Some of the tasks in the assignments will require computer equipment, word processors, typewriters, Fax, Telex, photocopiers, etc. If such equipment is not readily available or accessible, suitable alternative equipment or resources should be sought and found. Without the proper equipment to test the various skills or competences, these same skills and competences may not be considered valid by most (if not all) of the major public examining boards providing NCVQ integrated awards.

If a student is going to write or record, in a booklet provided by an examining board, that he or she can 'send a telex and obtain an answerback code in optimum time', then he or she must have had, at some stage, the facility to prove that he or she is capable of doing so. Having said this, it will in some cases not be possible to test every skill in every assignment, nor will it be necessary. For instance, most assignments involve the use of the telephone to a greater or lesser extent. However, if a student carries out all the objectives regarding the use of the telephone in assignments 1-6, there is no need whatsoever to continue with the telephone aspect of every single assignment in the pack. [It is worth noting, however, that when talking with employers about aspects of training for secretarial/clerical students, they most frequently mention poor or inadequate ability in the use of the telephone as a major criticism of our training and of our students' abilities. Perhaps, therefore, it should be a priority, when using these assignments, to include as much use of the telephone as possible until one is entirely satisfied that the students are *competent* users of this very important aid to communication in today's office.]

Role-play

Sometimes it may be difficult to test all the different aspects of the assignment on paper; this is where role-play can be very useful, with members of the group and the teacher/trainer/tutor or lecturer becoming actively involved in playing a variety of roles. Where assignments, for instance, suggest telephone interruptions, the tutor may wish to use telephone training equipment or simulator equipment to 'pester' the student attempting to carry out the assignments. To achieve realism, interruptions should sometimes be irregular and irritating, and sometimes constant but brief, as time may be of the essence in completing the assignments in the time allocation suggested. The tutor is the person who will know exactly the level of tolerance of individual students and is, therefore, in a good position to determine the number and extent of interruptions where these are not specified in the *list of skills*.

Role-play can also be extremely useful for testing the lists of additional duties which accompany some of the assignments, with the students acting out or improvising a scene or cameo from the information given. In some assignments the role-play could be done in groups, with a group of students playing the part of awkward customers and others playing the part of the secretary or assistant under fire from the awkward customer or client, as in the travel assignment where there

are many different types of interruption and many different problems to be sorted out. It depends on how much time the teacher can afford to devote to role-play, but it is worth stressing that it is a valuable learning tool which is often under-utilised in the classroom or training situation. Even grown-ups and more mature students are amazed at how much they can learn and at how they develop their skills, confidence and personalities through the careful and controlled use of role-play and simulation. No-one is too sophisticated to learn from this valuable educational aid.

It should be pointed out, however, that the teacher need not necessarily always be an active participant in the role-play situation but may be an on-looker or one who suggests ideas, pointing out different avenues or ideas which can be explored further through group or individual discussion.

Implementation

Obviously, if the assignments are being undertaken with a limited amount of space and very little training equipment, such as few word processing terminals and/or little or no access to Prestel or Telex, tutors should do their very best to use alternative equipment and techniques — for example, electronic or electric typewriters, paper-bound reference books, timetables, tape recorders, etc.

Another very important aspect of these assignments worth considering is the handling of office mail. Where students are required to sort out mail, it is necessary and important to build up a pile of junk mail for this purpose, including that accumulated from these assignments, that is, the typed-up or word-processed letters. It is usual practice in most offices to sort out the mail as one of the very first duties of the day and, for this reason, it is important to have an archive of resource material to hand in order to, yet again, achieve a realistic working environment. Students will usually appreciate any effort made to provide a realistic learning/training situation.

Where the diary is a skill being tested, diary pages are provided, and these may be photocopied as necessary and as required for the various assignments. Other suitable diary pages may be used, if tutors prefer, to achieve an even greater degree of realism.

Where the assignments call, for example, on students to deal diplomatically, sensitively and/or tactfully with clients, fellow students or the tutor may role-play clients with valid enquiries, complaints, problems, etc. For example, in the medical assignment, the receptionist will be absolutely besotted by the perpetual stream of patients. A bonus of using these assignments will be students finding out, as early as possible in their training, whether or not they are pursuing the correct course of study and if they are aiming for jobs in an environment which will suit their skills and personalities. For instance, after carrying out the medical secretary's assignment, a student may discover that he or she could not possibly cope with the constant interruptions and the problems which are encountered in such an environment. This is a valuable, valid learning experience.

The teaching/learning process can, therefore, be much improved by the careful, controlled use of role-play in the assignments, given the fact that there may very

well be time-constraints and many other similar problems such as lack of room, etc. This aspect of the assignments is certainly valuable and is definitely well worth the extra effort required to make it work successfully and realistically.

Assessment

Assessment of the assignments is, for some, a very big issue and, unfortunately, it is impossible to give hard and fast rules. Dogmatic guidelines are unnecessary as most teachers or lecturers who have had office or commercial experience – particularly recent experience – will appreciate that methods and standards vary from office to office and from profession to profession. What would be acceptable in a builder's yard might be totally unacceptable in an interior designer's office or studio in a well-heeled London borough, as the writer of these assignments quickly discovered.

The most important aspect of assessment is to see that the skills have been demonstrated by the students/learners or trainees to a degree of competence which would mean that they could be reasonably said to be 'employable' and competent. Using what would be acceptable in real life is much more important than using textbook guidelines as a measuring stick.

At the very outset, avoid awarding marks out of 10, 20 or even 100 and, at all costs, avoid awarding grades. The aim of these assignments is *realism*, and this is not to be thwarted by awarding marks or grades as for the usual teaching and marking practice. If the student or learner is competent, he or she need not re-do an assignment or an individual piece of work.

Ask yourself the following questions:

- Is the work acceptable to me as a teacher/lecturer with realistically high standards and expectations?
- Would the work be acceptable to an employer in this town or area?
- Is the student competent in this particular skill?
- Was the task or skill completed in a realistic target time?
- Would I be happy to send this student out into the world of work and to advise an employer that the student is absolutely competent and capable of carrying out the skills which I have just tested?

If the answer to any of these questions is 'No', get the student to repeat the assignment or, better still, get him or her to complete another assignment in another type of firm which tests the same skills.

In an office situation, work is either satisfactory or unsatisfactory, and if it is unsatisfactory it must be repeated. Similarly with these assignments. If an assignment does not meet at least conservative values of acceptability then it must be repeated after suggestions for improvement have been made.

Typewritten or word-processed material is eitherailable or unavailable; if it is unavailable, a boss will (or should) refuse to sign it; therefore it must be

re-typed, or word-processed copy must be amended or revised. This will help to achieve realism.

Consider also the value of self-assessment and peer group assessment, as these are important aspects of performance measurement in the workplace. There will not always be a tutor on hand to assess or say 'good' or 'bad'. Therefore, try to develop (as early as possible) the ability, in the students, to be constructively critical of one another and of themselves.

Hard copy output is easy to assess or evaluate; value judgements on how a student handles a delicate situation can, on the other hand, be much more difficult, and with younger students their assessments may not always be objective. It is quite amazing, however, just how discriminating and perceptive students can be of their own work — given a chance. For this reason, try not to overlook students' abilities; aim to help them to develop their own skills of assessment and do not rely solely on your own. Pass on your advice and experience as diplomatically and sensitively as possible; after all, you want your students to have a role model to emulate.

As an assessor of integrated schemes for the Royal Society of Arts Examinations Board in Northern Ireland, the author has found that, for the most part, lecturers and centre supervisors offering integrated awards using similar assignment-type material to that presented here are quite capable of using their common sense with regard to assessment. However, most examining boards offering integrated awards, including the RSA, specify *constraints* within which work or skills must be assessed and most also list *criteria for achievement* which specify quite clearly and specifically the requirements of individual examining boards in order to meet the required national standard. The NCVQ philosophy is that, within a national framework, people who have been tested in specific skills and various sub-skills should be able to pick up their qualification, take themselves to any part of the United Kingdom and find that employers will be able to recognise their level of qualification and their employability likelihood.

Having said this, it is, however, necessary to point out that some centres choose to set their own criteria for achievement, and often work as if the constraints for achievement of the various skills did not exist. In the mailroom assignment, for example, students are requested to deal with 30 pieces of outgoing mail using various postal services. In one particular centre, a supervisor pointed out that this was unrealistic and said that the students at that centre had achieved the criteria for achievement without operating within the given constraints. This, it was pointed out, was impossible. If 30 pieces of mail were the specified number, then this number was required in order to be able to say without any reluctance or hesitation whatsoever that all of the postal services had been fully covered in this particular skill.

It is wise, therefore, to pay close attention to the *criteria for achievement* and the *constraints* specified, as these are likely to be fairly common to most examining boards, given that the philosophy of NCVQ is carefully administered and applied.

Good luck to all users of these assignments; may they provide you with a sound framework to use as they stand, or as a basis on which to build, improve or even, if necessary, to abbreviate.

[illegible]