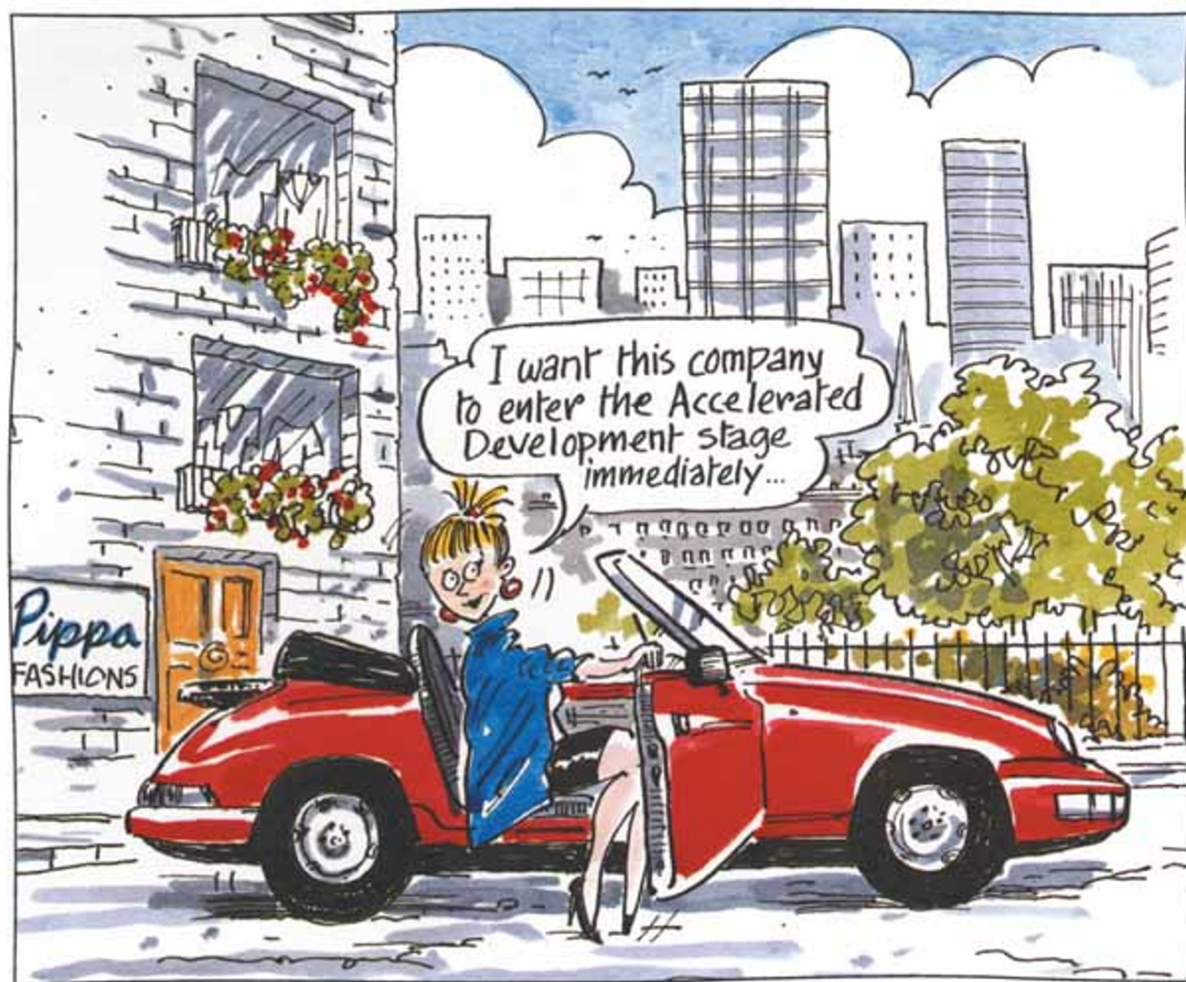


Macmillan Modern Office

MMO

# BUSINESS ADMINISTRATION LEVEL 3 PACK



Donald C. McFetridge

**Business Administration Level III**

## **Macmillan Modern Office Series**

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Macmillan Modern Office

*BUSINESS  
ADMINISTRATION  
LEVEL 3 PACK*

Donald C. McFetridge

**M**  
MACMILLAN  
EDUCATION

## *For Danielle*

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

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# Acknowledgements

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Thanks are due in no small measure to my parents for their enduring patience and for coming to visit me with gifts of delicious food during a bout of influenza when I insisted on persisting with the development and writing of these assignments early in January 1991.

Words of thanks must also be expressed to my many friends and colleagues – especially Molly St Leger and Wally Johnson – and to my students who continue to stimulate and inspire me in so very many aspects of my work.

A very big thank you to Pamela, Kylie, Garrett and Danielle for their all-too-welcome distractions from the task of completing this work, and to Margaret Keery, my good friend and mentor, who also greatly encouraged all my endeavours.

The following are thanked for their co-operation in producing handwritten material: Tim Fox, Jane House, Roda Morrison, Isobel Munday, Peter Murby, Bill Perry, Suzannah Tipple, Lee-Ann Whiting, John Winckler and Jane Wightwick.

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# Introduction

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Niccolo Machiavelli once said that “. . . there is nothing more difficult to take in hand, more perilous to conduct or less uncertain of success, than to take the lead in the introduction of a new order of things . . .” and I personally feel that these must be words of great encouragement, many years later, to teachers, tutors, lecturers and others involved in the very exciting and rapidly-changing world of education.

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## Change

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It does appear, however, that no sooner has one mastered one massive change than another appears and, even before the fresh challenge has been faced and dealt with, another newer one is already appearing on the horizon. Nowhere has this been more true than in the field of Business Administration which has seen so very many much-needed, progressive and forward-looking changes in recent years. The challenges are great but we must constantly remind ourselves that so too are the rewards.

With the advent of competence-based assessment – an excellent change in my opinion – have come many major changes for educators in this vocational area and most people have managed, successfully, to cope with the revolution and to see to it that students and trainees have received quality training, tutoring, teaching and eventual assessment. As a result of change, however, one is constantly under great pressure to adapt to the changes in examination/course/programme syllabi.

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## Rationale and Content

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I have written this second pack of assignments to follow up my first volume – *Integrated Assignments in Secretarial, Office and Business Procedures*. I have used eighteen of the companies already used in the above-mentioned pack as the basis for this current pack in the hope that it will lead to progression from Levels I and II to Level III – the level at which this pack is aimed.

Current philosophy is that we must afford our trainees or students progression and this, I trust, is the case for those who work from the initial volume through to the present publication. Each assignment is based in a real-life office situation, peopled by characters and staff/personnel already familiar to users of the previous pack. Each assignment begins with a list of skills, subdivided into main skills and associated or related skills together with a list of the principal resources required to



carry out the work. Being ever mindful of economies and cutbacks in training generally, I have tried – where possible – to keep the resources required to an absolute minimum but would like to point out that the real office, on work placement, etc, is a terrific resource in itself. Indeed it is perhaps the most excellent resource we, as trainers, are ever likely to have available.

Each assignment also contains a scenario or pen sketch of the background to the company in order to bring realism to the tasks to be carried out. Users need not, it should be noted, have worked through the previous pack to benefit from the assignments included here, although this would obviously be very useful. Each scenario is, however, fresh and original yet still based on the original company profiles in the previous pack.

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## On Being a Carrot – Achieving Realism

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During teacher training at Stranmillis College of Education in Belfast, one lecturer in speech and drama was encouraging his students to be more natural and relaxed in front of the classes they were teaching and, in order to encourage them, he invited them to think of a vegetable. One young man conjured up an image of a carrot and when he was told to *behave* like a carrot he made vigorous attempts to imagine himself drilled into the soil with his hair providing the leafage visible above the ground. When approached by the lecturer and asked the question: “Which vegetable are you?” the young man replied: “I’m pretending to be a carrot.” “Young man,” said the lecturer, “you have identified part of the problem; you are only pretending to be a carrot. You must learn not to pretend but to *BE!*” While the student looked a little bewildered and bemused, at the lecturer, he knew exactly the meaning of this somewhat strange statement and it should be emphasised again, when using assignments of the nature provided here, that students should be encouraged to *BE* and not to pretend.

The more often simulation is used, the less realistic the situations become and it also becomes very difficult eventually to assess the work. Encourage your students to think themselves into the roles described in an attempt to make the assignment work much more meaningful, both for assessment and training purposes.

Each assignment also includes a list of tasks to be carried out within a specified time limit and it is expected that students at Level III will be able to prioritise the workload so as to be able to complete the tasks required within the time limits given. Level III involves ‘Complex/skilled and/or supervisory work’ and much of this is, of necessity, included in these assignments in order to meet the criteria specified by the NWPSS.

Users of the pack will notice that each assignment is modular in form while still based in as realistic a situation as possible in order to prevent the tasks from becoming artificial or from appearing to be too contrived. All assignments do, however, include some extra, or superfluous, tasks in order to make the work as realistic as possible. For more detailed analysis of assignment content see the Matrix of Skills which follows this Introduction.

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## Research

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As with the previous pack of assignments, these present assignments are based on recent, relevant research into activities undertaken in offices in the 1990s and every attempt has been made to create an accurate impression (as far as possible) within each one. It is always quite a difficult task to generate realism from paper-based exercises, but users should find that these assignments do provide a realistic working backdrop for the tasks required since they are based on recent research.

Each assignment is structured in such a manner that it can be used in either of two ways:

- (a) for training purposes; OR
- (b) for assessment off-the-job.

It has not, however, been possible to include such assignments for the elements 2.1 and 2.3, ie 'Use and develop manual and computerised filing systems' and 'Organise and present information in a variety of formats', since these, it is felt, could only realistically be undertaken in on-the-job training/assessment. It would be foolhardy, if not unpardonable, to attempt to generate assignments in a pack of this size to assess or train for these two elements of Unit 2 – Researching and Retrieving Information. 'Health and Safety at Work' has been tested throughout all of the assignments where appropriate as it, again, did not appear to make sense to attempt to include a separate assignment on this subject in an effort to maintain realism and credibility with users of the pack.

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## Assessment Procedures

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When preparing assignments of this nature one is frequently asked about the actual assessment procedure. "Should we have a marking scheme?" is a favourite question. A definite "No" is the answer. Your marking scheme has already been prepared for you in the form of the course/programme document which spells out, clearly, the criteria to be used for assessing the performance of students or trainees. Most examining boards/validating bodies also supply guidance for assessors as to the type and amount of evidence required and some even indicate the type of underpinning knowledge and related skills which it is expected students or trainees should have before asking to be assessed on the individual elements of units.

Standards of assessment documentation vary from examining board or validating body to body but, generally speaking, the documentation is more than adequate and any problems or queries should usually, in the first instance, be discussed with the person appointed by the examining board/validating body to supervise the programme of delivery. Again, most are practising tutors or teachers themselves and are only too happy to share information and to suggest solutions from their own personal experience.

Despite the obvious and natural concerns of those attempting to train and assess students for Diplomas, particularly at Levels III and IV, it is encouraging to

x

remind ourselves again of the words of Machiavelli and to remember that we are pioneering new developments and rising to the challenge instead of stagnating in the pond. That, in itself, should be stimulus enough to encourage us to aim for the sky and to reach it by achieving and maintaining the very high standards to which we, and hopefully our students, aspire.

Good luck to all users of these assignments; may you find them interesting and fun to work through and, most importantly, good luck with your Level III qualifications.

# Matrix of Skills

Element of Competence	ASSIGNMENT																	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
1.1	☆																	
1.2	○	☆	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○
1.3	○		☆															
2.2	○		○	☆				○	○	○	○	○						
3.1	○	○		○	☆	○												
4.1						☆	○											
4.2						○	☆											
5.1	○	○	○	○	○	○	○	☆	○	○	○	○	○	○	○	○	○	○
5.2				○				○	☆	○	○	○				○	○	○
5.3								○	○	☆	○	○				○	○	○
6.1	○	○	○	○	○	○	○	○	○	○	☆	○	○	○	○	○	○	○
7.1	○											☆	○					
7.2												○	☆					
8.1														☆	○			
8.2												○	○	☆				
9.1	○	○	○	○	○	○	○	○	○	○	○	○	○	○	○	☆	○	○
9.2																	☆	
9.3																		☆

☆ = Main skill. ○ = Also covered.

---

# □ Assignment One:

## David Daniels Design

**Unit 1: Communication Systems**  
**Element 1.1: Organise allocation and despatch of mail**

---

**Target Time: 1½ hours**

### Main Skills

- |   |  |
|---|--|
| <ol style="list-style-type: none"> <li>1 Processing mail correctly and distributing promptly to correct locations</li> <li>2 Preparing mail correctly for despatch and, where applicable, using the correct current postal rates</li> <li>3 Identifying and selecting delivery services to suit the specific requirements</li> <li>4 Monitoring the work progress of others to ensure that instructions are precisely followed</li> <li>5 Keeping records up-to-date, legible and accurate</li> <li>6 Delegating tasks to others within accurate parameters and monitoring progress of same</li> <li>7 Following and implementing safe working practices at all times</li> <li>8 Following and implementing security and confidentiality procedures at all times</li> </ol> | <ol style="list-style-type: none"> <li>2 Monitoring processes</li> <li>3 Analysing and explaining procedures to superiors and to junior colleagues</li> <li>4 Maintaining effective and efficient working relationships with superiors and junior colleagues</li> <li>5 Prioritising tasks to meet deadlines, schedules and target times, etc</li> <li>6 Following implicit and explicit written and oral instructions accurately</li> </ol> |
|---|--|

### Resources

Typewriter or Word Processor or  
 Computer Terminal  
 Supplies of stationery – letter-headed,  
 memo paper, etc  
*Post Office Guide*  
 Classified Directories  
 Street Directories  
 Telephone training equipment  
 Letter opener  
 Franking machine  
 Paper shredder  
 Letter-weighing scales  
 Calculator  
 Stapler  
 Postage Received Book  
 Postage Out Book

### Associated Skills

- 1 Planning the volume of work to time schedules as appropriate and meeting targets and deadlines



**DAVID  
DANIELS  
DESIGN**

**Interior  
Decorators  
& Designers**

20a West Haskins Street  
Sloane Square  
London SW10 3RD  
Tel 081 984 5662  
Fax 081 984 3829  
Telex 98574 DADAD G

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## David Daniels Design – Scenario

---

David Daniels Design is a world-famous Interior Decorating and Design Studio owned, managed and run by David Daniels himself, despite declining years. He is a fascinating person for whom to work but he is extremely well-known to his staff for his fiery temper and for the very volatile mood changes which we all have to put up with from time to time.

As he has progressed in years he has been handing over more and more of the responsibility for the day-to-day running of the business to his assistant Ian, while you have to get on with the heavy burden of administrative tasks which clutter your desk each day.



While he does not really involve himself in the daily grind of office affairs, Mr Daniels has a very good mind and he knows exactly what is going on and, more to the point, what is not going on when he is absent abroad on business.

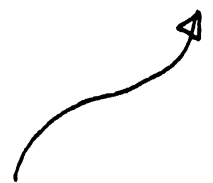
You arrive in the office to find a note from him in his usual inimitable style – full of exaggeration and hyperbole, but nevertheless it highlights just how very sympathetic and caring he can be with staff for whom he really cares and you are one such person. You have been working for him since gaining your Level II Business Administration Diploma and he has agreed to countersign your competences for skills/elements, etc which you have to have accredited on-the-job, in the workplace. He is keen to see that you pass all elements of your Level III Diploma and, upon successful completion, he has promised you an increase in salary and an additional bonus payment or incentive payment. He realises also that he may lose you if he does not reward you suitably. Good staff are difficult to find and he is aware of this fact.

Read his note carefully and, while the tasks could easily be carried out by a junior, implement them yourself as no-one else is competent – in his opinion – to do this type of work. Good luck; be patient and enjoy your work!

This morning I'm taking time off to visit a friend at Kew for a few hours and, if the weather remains decent, I may also take the afternoon off as well and perhaps Charles Selwyn-Lloyd (my friend at Kew) will join me for a cruise on the Thames.

As you are aware, I am now more or less a figurhead for DDD. David Daniels is not finished but he knows how and when to relax. I frequently work for 24 → 30 hours on the trot and then take a week off. I enjoy getting all my work well and truly organised and then I am in a much better frame of mind and I can, also, enjoy myself and relax more easily.

Ian is in complete charge now and we're lucky to have Caroline in to look after the country house interiors for Ian so that





he, with ease, can assume the greater responsibility that was once mine.

I have perceived recently, at ddd, a certain chaos in the mailroom. On a recent visit I heard many complaints and much moaning and groaning about the workload. How awful are the words which are gradually creeping into our vocabularies!

Investigate the procedures for the allocation & despatch of mail at ddd and set down, in a memo, a note of the procedures to be followed.

I am a 'Procedures' person - everything should be done correctly, at the correct time, in the correct manner, by the correct person at the right or correct speed. That way, nothing goes wrong and no-one becomes



6

anxious or upset! It's so very simple!

Before I ramble on any further, I'd like to draw your attention to the list of duties to be carried out during my time off today.

Please can you see to it that all the correct procedures are safely implemented and followed at all times.

Good luck.

See you very soon.

David.  
/

---

## List of Mail to be Dealt With

---

- 1 Send the 3-page introductory leaflet about our Interior Design Services to:

Mrs Sally Arnold,  
42 Shellbridge Avenue,  
Portrush Road,  
COLERAINE,  
Co. Londonderry,  
N. Ireland BT52 4HQ

Send this 1st class mail.

- 2 Send a similar leaflet to:

Ian Craig, Esq.,  
41 Deramore Place,  
RANDALSTOWN,  
Co. Antrim,  
N. Ireland BT61 7IY

Also 1st class mail. Please use weighing scales to check that the standard rate for 1st class letter post is sufficient. I do not want clients to think that we use a second-class service. We are a prestige company and, as such, always use the very best and quickest mode of delivery. Use the scales in the post room.

- 3 Send the in-house memo in a re-usable brown envelope (with the lines on) to Franz in Fabrics. Mark this confidential as this contains information which should not be made public knowledge to any other employees. Perhaps you should deliver this personally, although I know you have zillions of other things to do.
- 4 Send the book – *Daniels on Design* – weighing 2 lb – to Lady Edwardson at her London address. You will find this address on her personal file. Prepare a suitable short inscription for her, something like, to dearest Lady E from David Daniels, . . . . ., 199–.
- 5 A box arrives on your desk wrapped in brown paper and tied with string. The postal code is County Fermanagh, Northern Ireland. What do you think you should do with this parcel? Act quickly but do not alarm other staff unnecessarily. You will have to use your common sense in this instance. Remember what I say: “Common sense is not always common practice.”

- 6 There have been three internal applications for the post of Archivist. Send a brief memo to all three applicants, names below, thanking them for their applications and promising them that interviews will be held within the next ten days. They are all short-listed. Do not let them know that they are the only three applicants; indeed do not disclose the number on the shortlist at all.

Applicants: Pierre Claremontague, Sales and Marketing Librarian;  
Cynthia Arnott, Fabrics; and  
Karen C. Scott-Burrows, Prints.

- 7 Send the letter which I have already addressed (in the top drawer of my desk) by air mail to Germany. It is only three sheets of light air mail paper. Make sure you use the correct postage. Do not frank this item. Use an actual postage stamp. Remember – PROCEDURES!
- 8 Post the account with the cheque for £5600 to Harvey Nichols in settlement of my personal account. Address on the account – Knightsbridge – just around the corner from our offices. Perhaps this could be delivered by hand – a courier perhaps or a biker?
- 9 I need to send some tufts of carpet to Saddam Mohamed Fadel in Jeddah, Saudi Arabia. Investigate the *PO Guide* to see how we can do this and then organise delivery. On second thoughts, do you think we should use an international courier, DHL perhaps? You find out!
- 10 Fourteen C6 size letters arrive marked for my attention. You have my permission to open all my mail except that marked PRIVATE or CONFIDENTIAL. Use the letter opener to find out who has been writing to me this time!
- 11 In the filing cabinet, of which only you have the keys, you will find – in the third drawer at the back – a file marked ROBB. Send this file in full to Robert Robb, Templemore Beach Hotel, Templepatrick, County Antrim, Northern Ireland, BT61 3ZF. Mark it STRICTLY PRIVATE AND CONFIDENTIAL. This is a commercially confidential item; it's actually a tender for the refurbishment of this very elegant cathedral-like hotel.
- 12 There are four A4 size envelopes which require to be sent by second class mail but they will not fit into the franking machine. Use the correct equipment to prepare the adhesive franked strips for these envelopes and then affix to the envelopes which should be addressed landscape style.

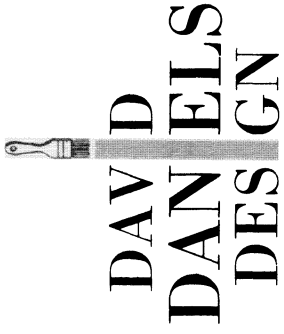
- 13 Deal with any incoming telephone calls and keep a note on paper of all calls no matter how trivial, apart that is, from Nell, my housekeeper. She is neurotic and has frequent bouts of depression which I have to talk her through. I'm arranging for her to see my psychotherapist as a special birthday present. Tell her you're busy and that you'll call her back, but don't bother. She'll simply have another gin and tonic and be fine when you call her. Don't worry about her fire alarm calls.
- 14 Complete the Postage In Book and the Postage Out Book for all items of mail. Remember – Procedures! Records should be kept up-to-date, legible and accurate at all times!

**Memorandum**

**From:**

**To:**

**Subject:**



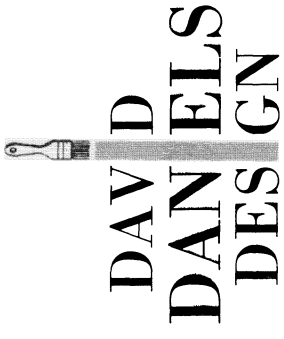
**Date:**

**Memorandum**

**From:**

**To:**

**Subject:**



**Date:**

---

# □ Assignment Two:

## Pollock & Pollock

**Unit 1: Communication Systems**  
**Element 1.2: Use the telephone system to the full**

---

**Target Time: 1½ hours**

### Main Skills

- 1 Making, receiving and transferring courteously, using approved organisation procedures, telephone calls within the company
- 2 Screening incoming calls in accordance with approved organisation procedures
- 3 Representing (effectively in both content and style) the principal in respect of calls made and received on his behalf
- 4 Recording messages accurately and passing them on promptly to the correct person and/or location
- 5 Transmitting and receiving clearly and accurately answering machine messages
- 6 Maintaining a proper balance between economy and the efficient use of time, in accordance with the organisation's rules and procedures
- 7 Keeping a schedule of calls up-to-date, legible and accurate
- 8 Delegating tasks to others within accurate parameters and monitoring same
- 9 Following and implementing safe working practices at all times

- 10 Following and implementing security and confidentiality procedures at all times

### Associated Skills

- 1 Operating a multi-line telephone system
- 2 Using telephone answering machines
- 3 Using directories as appropriate
- 4 Operating internal and external paging systems
- 5 Monitoring use of telephone system and progress of calls
- 6 Using judgement and initiative

### Resources

Telephone training equipment/  
 switchboard – multi-line  
 Word Processor or Typewriter  
 Telephone Message Pads  
 List of telephone extensions for the  
 company  
*Telephone Directories*  
*Classified Directories*  
 Tannoy/Public Address System  
 List of calls – attached  
 Telephone Interruption List – BAI pack  
 Interruption Task – attached



# POLLOCK & POLLOCK

Advertising Specialists

211 High Holborn, London WC2N 6JU

Tel: 071 372 1386 Fax: 081 654 2901 Telex: 984520 POLOCK G



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## Pollock & Pollock – Scenario

---

You are the Personal Assistant of Mr Peter Pollock – the co-owner of this prestigious advertising company in High Holborn, London. He is a very bad-tempered executive and his workload has increased lately to such a degree that he is virtually unable to cope with the steady stream of callers – both personal and telephone callers.

Molly – the receptionist/telephonist is off for a week's holiday at present so, in addition to your already overloaded administrative and secretarial function, you have to look after all the telephone calls. This has meant that you have, in effect, had to bring all your work to the front of the offices in High Holborn in order to perform the receptionist part of the job. This is easy as the number of personal callers (without appointments) is limited. Most clients have knowledge of the volume of work which passes through the company and, therefore, have the good manners and good sense to book time with the advertising or account executive they wish to deal with in advance.

The telephone system in Pollock & Pollock, however, is used to the fullest degree possible – both incoming and outgoing calls to the extent that, at times, the switchboard is jammed, particularly on days when jobs are advertised in *Campaign* or *Marketing* – the two trade journals which contain the advertisements for new staff. Everyone seems to be trying to gain employment in P&P, and especially all those executives recently made redundant as a result of the worldwide downturn in advertising expenditure.



Please carry out your original secretarial function and also look after the telephone – incoming and outgoing calls – taking care to delegate the responsibility to Sal when you take a short break for coffee. Keep the Register of Callers legible, accurate and fully up-to-date at all times and ensure that all incoming and outgoing messages are accurately received and transmitted. Good luck and enjoy your work!

Memo

Molly is off on a week's leave at present as from today and we have (again) forgotten to get in a temp. Could you please telephone around a few agencies and see if you can get us a temp by the latest as from tomorrow!

I need you to look after (solely) your own secretarial work for my projects and I cannot really afford to have you also looking after receptionist/telephonist duties.

It is a waste of energy and you will be constantly interrupted, with the result that you will find it difficult to get on with my personal work.

Anyway, get a temp as quickly as possible, and in the meantime, perhaps you could prepare a set of guidelines on the operation of the switchboard.

—→

Write these guidelines in simple, clear English  
- an idiot-proof guide to the use of the  
Switchboard.

The attached Register of Calls is not really  
terribly good or suitable for recording our  
notes of telephone callers. Please modify  
this so that it is more suitable for recording  
incoming and outgoing telephone calls.

Also, get some of the more capable  
students on work experience to help  
you with your duties. You need not do  
all this work singlehandedly.

Good luck

---

Peter Pollock.

## List of calls      S

17

- 1) Incoming call from D.E. Telfan for Peter Postok. Received 10.20 a.m. Refer immediately. This is an urgent call.
- 2) Incoming call from Mrs Rosalinde Browne for Malachy Mulloney. He is in Greece on vacation. Take a note of the message. "Please hurry account ASAP addressed to Mrs R Browne, 7022 Feather Crescent, Dunstable Beds., DH2 1NB" Time 10.28 a.m.
- 3) An internal call from P.P. He wants to know if you've found a temp as yet.
- 4) Telephone a few agencies to get a temp as quickly as possible. Record all telephone calls you make as P.P. are analysing all registers of calls and telephone accounts in great detail.

---

→  
M/T

- 5) Consult Yellow Pages or classified directory to ascertain the telephone numbers of three local catering companies who specialise in catering for business functions in-house.
- 6) Call each company and ask for a brochure or list of the services they offer companies. Record these details in a memo for P.P.
- 7) Tel the Beverley Hilton, Beverley Hills and book a single room with en suite facilities for P.P. for the last two days of next month. Take a note of the length of this call and also check up on the tariff for a single room, per night. [Remember: time difference in USA: West coast Time.]
- 8) Incoming call 11.01. a.m. from Miss Pauline Norton for Malachy. Take a message: "Please return call as soon as poss."
- 9) Attend Register of Callers form.
- 10) Order more Telephone Message Pads

- 11) Incoming call 11.22 a.m. from local newspaper.  
 Martin Johnston (Advertising): query for P.P.  
 Do not put this call through. P.P. cannot  
 bear M. J.; they always disagree with each other.
- 12) Book a hair appointment for Penny Pollock  
 at Jon Paul's in the Aldwych for tomorrow  
 at 4 p.m. Her stylist is Jon Paul-Stylo himself!
- 13) Cancel a meeting P.P. has arranged  
 with Graham plc at 071-734 8490  
 tomorrow p.m. He's unsure of the actual  
 time booked. Reason: P.P. is out of the  
 country at very short notice.
- 14) 11.48 a.m.: incoming call from Barry  
 McGregor. Query re: Terence Laughlan  
 (your graphic designer). Wants his home  
 tel. no. You cannot disclose this in-  
 formation. How can you put them in  
 touch?

- 15) Prepare a script for the telephone answering machine when the offices are closed. To last only 20 → 30 seconds. Type this in double line-spacing and pass copy to P.P. for approval.
- 16) Telephone London Transport to find out the times of buses from Trafalgar Square (night buses) to Highbury & Islington for P.P.
- 17) Two calls coming in at once: 12.15 p.m.  
Mr. Keith Burtin for P.P. and also Miss A.M. Hussene — also for P.P.  
Mr B. seems agitated; Miss Hussene appears to be relatively calm. Decide which one to connect first and then check on the progress of the telephone call in order to put the other caller through as soon as P.P.'s line is clear.
- 18) Record all details accurately, legibly and as rapidly as possible.
-



## Interruption Task

[To be handed out after 20 minutes]

Please page Tony Davies as quickly as possible. Ask him to come to reception. A Mrs Borroah is waiting for him re: her overdue account for housekeeping services rendered. [Do not disclose any private information which might possibly embarrass Mr Davies.]



# Telephone Message

Message for \_\_\_\_\_

Date \_\_\_\_\_

Time \_\_\_\_\_

Caller \_\_\_\_\_

Call Back Number \_\_\_\_\_

Message

Taken by \_\_\_\_\_

To .....

Date .....

## WHILE YOU WERE OUT

Mr/Mrs/Miss .....

of .....

Phone No .....

Telephoned		Please call him	
Called to see you		Will call again	
Wants to see you		Urgent	

MESSAGE

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

Operator .....

# Telephone Message

Time Received ..... Date .....

From .....

Message .....

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

Received by .....

MEMORANDUM

From:  
To:  
Subject:

Date:

From:  
To:  
Subject:

MEMORANDUM

Date:



POLLOCK & POLLOCK



POLLOCK & POLLOCK

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# □ Assignment Three:

## Bailey, Bailey & Mills plc

**Unit 1: Communication Systems**  
**Element 1.3: Transmit and receive information using electronic equipment**

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**Target Time: 2 hours**

### Main Skills

- 1 Using the most appropriate transmission system, in relation to urgency, cost and security
- 2 Selecting the equipment correctly and using same following laid down operating instructions
- 3 Preparing written and typescript material accurately and correctly for transmission
- 4 Transmitting information to correct location within the required deadlines
- 5 Promptly delivering incoming information to the correct location/s
- 6 Monitoring and maintaining the clarity and completeness of outgoing and incoming transmissions
- 7 Rectifying and reporting any/all faults promptly and efficiently
- 8 Keeping records up-to-date, legible and accurate
- 9 Delegating tasks to others within accurate parameters and monitoring progress.
- 10 Following and implementing safe working practices at all times

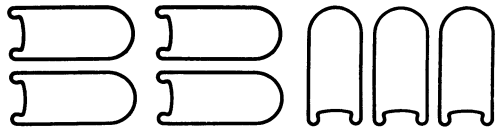
- 11 Following and implementing security and confidentiality procedures at all times

### Associated Skills

- 1 Prioritising tasks as appropriate
- 2 Using appropriate and accurate keyboarding techniques
- 3 Using dictionaries and other reference sources
- 4 Using electronic and other directories
- 5 Reading and interpreting operating instructions
- 6 Using accepted telex conventions
- 7 Accessing electronic mail/E-mail via modem

### Resources

Typewriter or Word Processor  
 Computer Terminal linked to E-mail system  
 Telex system  
 Fax system  
 Telephone training equipment  
*Fax, Telex and Telephone Directories*  
 Electronic Paging System  
 Equipment manuals



**Bailey, Bailey & Mills PLC**  
PUBLISHERS

190 Floral Street, Covent Garden, London W1  
Tel: 081 898 4563 Fax: 081 786 2635  
Telex: 987452 BABAMI G

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## **Bailey, Bailey & Mills plc – Scenario**

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When you commenced work at Bailey, Bailey & Mills plc, you were employed as a junior VDU operator but, before too long, you had proved that you had ability way beyond the duties which were required of you. For this reason, Mr Bailey Senior – a real gentleman – put you forward for promotion within the company and, as a matter of fact, and to the great horror and surprise of the more senior staff, you are now totally and completely responsible for the Technology Department within this very important and expanding company.

BB&M plc has recently launched a new wave of textbooks aimed at people wishing to learn new languages and this has been very successful, what with the SEM and several other important happenings such as the Channel Tunnel, etc.

Nowadays, a great deal of the communication in BB&M takes place via electronic equipment whereas, before, most of the correspondence and communication took place via the printed page.

You have ultimate responsibility for all equipment and that includes reporting and, if possible, rectifying faults. This is a very responsible post and one which meets with a lot of trouble and confrontation in the form of Mrs Mary Rogers who wanted to be in the position after eighteen years of loyal service with this longstanding Covent Garden publishing company. Nevertheless, you manage to maintain effective working relationships in spite of many difficult moments and the inevitable confrontations which take place. Do not worry; this happens in most companies and, if you were to move jobs, you would probably find equally testing personnel there as well.

You arrive in the office this morning at 11.00 am – you work flexitime – to find the attached list of duties on your desk. Do your very best to clear up all this work with help from colleagues where necessary, before you take lunch at 1.00 pm. Good luck and enjoy your work – in spite of Mrs R!

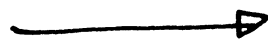
10.20 am

J J Bailey Junior has gone to Italy (Milan to be precise) for the launch of the "Make yourself clear in Italy" books.

This series of books has, as you know, been very successful both here and in Europe. We are very pleased with the sales figures and hope to launch even more titles in this series.

I have had complaints from a certain lady in BB8M plc who feels that you are not very efficient at your work.

Please could you see to it that (despite our flexitime working hours policy) you are at your desk by 9.30 am at the latest - every day. I know (before you get angry) that you more than put in your hours and I also know that you are more than capable of executing all





the tasks which I set, and others set for you within the company.

The attached list indicates the work which I require you to do this morning.

I am probably partly to blame for the fury of Mrs. R. (who you must learn to work with as quietly as possible) as I asked her to send a telex and she refused, giving the excuse that you keep manuals and instructions/operating books locked away in your desk.

Make these books/manuals freely available.

We do not want to prevent all staff from having the opportunity to use this expensive equipment.

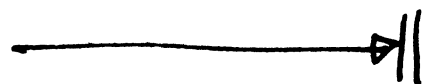
I am aware that you may take this memo as a criticism! It is not intended as such and I would like to encourage you rather than to dishearten you. Keep your chin up and maintain your excellent standard of work!

---

Bill Bailey Senior.

## List of duties:

- 1) Send a Fax on our company headed paper to 071-744 4422 addressed to Mrs. M. M. St. Leger at the University of London requesting her review of the Retail Textbook proposal.
- 2) Telex Mohamed al-Zubair on Oman, Muscat 84048520 [Zubair JZ]. Request details of progress on book on middle eastern food technology. We need this very urgently.
- 3) Send an e-mail message to Mr Peter Muirhead - commissioning editor here @ Floral Street, requesting his travel expenses for the Spanish conference he attended three weeks ago.



- 4) Page Mr. Tony Bailey. He is requested at reception by Mr. Fablesom of rival publishing house - Fablesom & Fablesom. Do not disclose any such information over the tannoy system. Tony would probably get very angry.
- 5) Mrs. Rogers reports that the telex is o.o.o. Can you help? Where are the manuals? If you cannot rectify the fault, try (at least) to identify same and report it to the relevant source for immediate repair. I think it may actually only require more paper. Check this one IMMEDIATELY!
- 6) Send a CONFIDENTIAL message to JJ Bailey at his Milan hotel (La Scala) asking him how things are going. Indicate that we urgently require a Confidential progress report.

- 7) Find out the fax. no. of Harrods as I want to send them a message re: book orders.
- 8) Also, check if Hatchards of Piccadilly, London have a telex as I'd like to send them some advance info.
- 9) Urgently contact Angela Peters at home. She has a fax (0847: 846012). Ask for an update on the Japanese book deal. This is ultra urgent!!!
- 10) Design a record book to record details of all fax, telex, telephone and e-mail messages, eg,

Messages Transmitted						
	Fax	Telex	Tel.	E-mail	By	Date
1						
2						
3						

etc!

- 11) Also prepare a similar sheet for "Messages Received".

Perhaps you, or one of the junior staff, could w.p. these two A4-size record books and then fax them to our printer in Epsom for multiple copying - 500 only of each: initially.

- 12) Send a routine notes of sales (514 this month) to Peter Himpson on Telex 0232 444044 (HIMPSO G). Send also our sincere congrats!

Thanks,  
B B Senior

AAA  
EMO

Date:

From:

Subject:

To:

AAA  
EMO

Date:

From:

Subject:

To:

BBB  
AAA

**Bailey, Bailey & Mills PLC**

BBB  
AAA

**Bailey, Bailey & Mills PLC**

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# □ Assignment Four:

## Graham, Muir & Allen

**Unit 2: Researching and retrieving information**  
**Element 2.2: Locate and abstract information from unspecified sources**

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**Target Time: 1½ hours**

### Main Skills

- 1 Identifying the correct sources for specific information requests
- 2 Promptly researching specified information needs
- 3 Abstracting correctly the relevant elements of information
- 4 Reporting to the principal where potential or available sources of information are exhausted without success
- 5 Checking all information content for accuracy and relevance
- 6 Following and implementing safe working practices at all times
- 7 Following and implementing security and confidentiality procedures at all times

### Associated Skills

- 1 Using a variety of reference sources
- 2 Identifying and extracting relevant information
- 3 Assessing quality and accuracy of information
- 4 Prioritising tasks where necessary
- 5 Following implicit and explicit oral and written instructions

### Resources

*ABC World Airways Guide*  
*British Rail Timetables*  
*British Airways Shuttle Timetable*  
*Telephone Directories*  
 Classified and Street Directories  
*A-Z for London*  
 Access to viewdata  
 Copy of the *Data Protection Act*

# GRAHAM, MUIR & ALLEN

D E N T A L   S U R G E O N S

129-133 Pan Road, Basingstoke, Hampshire RG24 2LK  
Telephone 0256 76892 Fax 0256 89821  
Telex 890236 GRMUAL G



## Graham, Muir & Allen – Scenario

You have been working for GM&A for six months now and after your initial induction period, you have been promoted to the post of Personal Secretary to all three dentists. This is very demanding and Melanie Marrs is none too pleased. She had been working in the organisation for several years but you managed, somehow, at the interview, to get the job. I think it may be that your qualifications are particularly relevant and up-to-date. A Level II Diploma in Business Administration is a very good starting point.

Wisely, at the promotion interview, you requested day-release to attend the local college to obtain a Level III Diploma and you are now the subject of close scrutiny by all those in the practice who do not believe in furthering their education by such methods. You have a duty to yourself to work hard both in the job and at the college in order to prove your worth, although Mr Graham, the senior partner, is delighted with the high standard of your work.



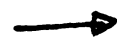
Today you have been left to handle all the front-of-house reception work along with your usual secretarial duties for the three professionals and, in addition, there are numerous requests for information which you will have to try to track down. The sources where you will find the information are not always specified as the dentists feel that this is really part of your research function; you should be able to source the information, extrapolate the correct facts, figures or whatever other information is requested and then present it in a legible and accurate fashion, taking great care, of course, to check that it is the correct information required.

Read the attached lists of information requests very carefully – and the memo from Mrs Muir, the female dentist – before you begin working. Good luck and enjoy your tasks!

Mr. Graham and Mr. Allen are going to be extremely busy all day as this is the day for extractions. I, however, am on standby to deal with all my regular appointments and also any emergency appointments which may turn up.

Do not ask either Mr. G. or Mr. A. to take any additional work; pass on any requests for emergencies to me but do not turn away clients. You know what it's like if you are in pain and the dentist is too busy to see you.

At any rate, I have Pauline Kydd - the trainee dentist - with me for two weeks so it's a good way of letting her see just how frantic things can become in a busy dental practice.



I know that, in addition to your usual duties, you have to look after reception today - so you will be very busy.

Could you, however, try to locate and abstract the information requested in the following lists, from unspecified sources. There are so many things we need to know but, due to pressure of work, we seldom find time to settle down to find out the information which we require.

Deal with my list first if you don't mind, and then do as much as you can of the Graham and Allen lists.

If you need to: delegate! I would, however, prefer you to do all this work by yourself as we all have utmost good faith in your high standard of work.

---

Sandra Moir, BDS.

---

## Info. list : Sandra Muir

- 1) Find out the quickest route from Green Park to Seven Sisters by tube. Detail the stages of the journey on a postcard or on a piece of A6 paper.
- 2) Check up (electronically, perhaps) what the weather is like in Malta. I fly off there on holiday on Friday and I'd like to know what the temperature is at present.  
You might also check yesterday's details in today's newspaper - for accuracy.
- 3) Check up on the addresses of dental practices (in your area) and present an alphabetical list of the competition on A4 paper, including addresses and telephone nos. etc.
- 4) Check up on the times of trains from Basingstoke to Birmingham detailing where trains stop and changes are necessary, etc.

Info. list: Gordon Graham

41

1) I'm going to a conference in Hawaii next month. Find out details of flights and prices, especially any special deals, Apex fares etc. I travel on --/--/9\_

Details on a postcard or A6 paper please. Mark it confidential and place in a sealed envelope.

2) My son, Jason, studies retailing at the University of Ulster, Jordanstown, near Belfast. Find out the cost of flights from Belfast International Airport to Heathrow at weekends. I think he uses the shuttle. We will need to send him his ticket (single) to come home to Hampshire for the mid-term break next week.

GG

## Info list: Victor Allen

- 1) Find out how many patients we (all three) dentists see (between us) in an average week.
- 2) Check up on which musicals are currently running in the west end. It's Myfanwy's birthday next week and I'd like to take her to see a show. Check the Palladium esp. She particularly likes it. Also check up on ticket availability for next Thursday.
- 3) I have to visit Newport, Gwent, next Monday to give a talk to a ladies' group on Preventive Dentistry. Check up (AA/RAC guides?) the no. of miles and calculate my car mileage expenses @ 36.4 p per mile.
- 4) Update Angelica Cupples' file: new address —  
12 Shelley Lodge, Basingstoke, Hants. RG21 2XB.

Thanks

Vic.

MEMORANDUM

From:

Date:

To:

Subject:

**GRAHAM, MUIR & ALLEN**

DENTAL SURGEONS

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# □ Assignment Five:

## Cumming, Cumming & Jones Ltd

**Unit 3: Reception**  
**Element 3.1: Receive, screen and assist visitors**

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**Target Time: 2 hours**

### Main Skills

- 1 All visitors received courteously and identity established
- 2 The nature of the visit and the needs of the visitors are identified and matched to the products and/or services of Cumming, Cumming & Jones Ltd
- 3 Visitors within own scope of responsibility at CC&J are dealt with directly
- 4 All other visitors referred to relevant parties in accordance with CC&J procedures
- 5 The structure, services, etc of CC&J are accurately described and promoted to all visitors
- 6 Non-routine and any emergency demands are dealt with promptly and effectively
- 7 Mr Cumming Senior (the principal) is protected from all unnecessary interruptions at all times
- 8 All records are kept up-to-date, legible and accurate at all times
- 9 Safe working practices are followed and implemented at all times
- 10 Security and confidentiality

procedures in CC&J are followed and implemented at all times

### Associated Skills

- 1 Operating the telephone system
- 2 Listening to, and interpreting, information
- 3 Taking and transmitting oral and written messages
- 4 Conversing with visitors, disclosing only appropriate information
- 5 Completing forms and records
- 6 General interpersonal skills
- 7 Judgement and decision-making

### Resources

Typewriter or Word Processor  
 Telephone training equipment  
 Pens and pencils  
 Legal Aid leaflets  
 Register of callers  
 Appointments book  
 Tea/coffee-making facilities  
 Miscellaneous magazines for coffee table  
 Reception desk/area  
 Stationery – memo, headed paper, envelopes, etc  
 Telephone Message Pad





**CUMMING, CUMMING & JONES LTD**  
— SOLICITORS —

Highgate Hill Road, Hampstead, London HA16 7PJ  
Telephone: 071 387 1082 Fax: 081 785 3412 Telex: 756371 CUCUJO G

## Cumming, Cumming & Jones Ltd – Scenario

During the past year you have been employed as a mail clerk in the mail room of Cumming, Cumming & Jones Ltd – a small expanding group of solicitors practising in Hampstead, North London, and now planning to specialise in matrimonial and probate work.

Sylvia Cumming, the wife of Mr Cumming Senior, used to be in charge of the administrative side of the business but she has now become much more actively involved in her charity work in the parish and has relinquished her post. As a result of this, there has been a reshuffling of personnel within the company and, as a result of your past efforts and hard work, you have recently been promoted justifiably to the post of Head Receptionist.



Mr Cumming Senior has spent rather a large amount of money on the refurbishment of the company's offices and you are now in charge of the total reception arena.

Unfortunately now that Sylvia has left and has no wish to be contacted with respect to the business, you have no one to refer to for advice or assistance. You have shown in your past work that you are more than competent at junior clerical tasks, but you must now prove beyond a shadow of any doubt that you are more than capable of executing the tasks for which you are responsible in your new and exciting post.

Today it seems is one of the busiest of the season, right after the recent public holiday. You should handle the following visitors with the utmost care and caution as those who visit your company are sometimes naturally a little apprehensive of legal matters.

Good luck!

3/1/199-

Congratulations on your recent promotion to Head Receptionist. As you know, my husband and the other partners are extending the business and hope to specialise (eventually) in matrimonial and Probate work - joy of joys!!

I, thankfully, will now be able to devote more time to my charity work in the parish and also to a special project in Germany. I, too, am thrilled with my new-found freedom.

Please take care when you are in reception as this is the most important part of the company. You were carefully and deliberately chosen because of your unflappable and pleasant manner. The wrong person in reception could spell disaster for CC & J, and that we simply cannot afford.

Remember to keep your record books fully up-to-date and ensure that they are legible and accurate. You should know all the company personnel by now at any rate and, in your new position, you should require little assistance anyway. With promotion comes much responsibility. I know you can handle it and I wish you much success in the future.

Off to Munich in the morning!

Love,

Sylvia

---

## List of Callers

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- 1 A tall aristocratic-looking lady in a brown coat wearing dark sunglasses (despite the snow) arrives in reception and is dabbing her eyes with a handkerchief. Be courteous to her and ascertain her requirements. Remember: she looks more than a little bit upset. Direct her to the appropriate department and, if she is to be kept waiting due to the lack of an official appointment, offer her a cup of tea or coffee and a magazine. Do not pry too much into her personal affairs and use her correct form of address. She happens to be Lady Angelia Bellini.
- 2 Mr Cumming Senior is keen to move the business into the specialist areas of Matrimonial and Probate work. The next caller, Mr Timothy Anderson, has called in connection with the purchase of a house in nearby Belsize Park. Decide whether or not to refer him to Mr Douglas (the newly-appointed solicitor) or decide whether you should refer him to Hail, Hamilton and Harty, the firm of reputable solicitors in nearby Primrose Hill. Remember, of course, that you should be making every effort possible to match the services of CC&J to the needs of the clients. Also, it should be pointed out, Mr Cumming's keenness to move into specialist areas does not mean that he can, at this stage, afford to throw away any run-of-the-mill work which happens to be presented to him. Work of any kind, no matter how dull it appears, can usually mean money to keep the business going.
- 3 The next caller simply wants a leaflet on Legal Aid. You do not have to refer him to a solicitor since the issuing of such leaflets is within your remit. Remember to be polite to this visitor and explain the appointments procedure. Also give him the name and address of CC&J as it appears that he is not bothered whether he uses CC&J or another solicitor with a Legal Aid sticker in their office window.
- 4 Mr and Mrs Winterman (Swiss confectioners from nearby Lavender Hill) have an appointment to see Mr Henry Cumming (Sylvia's son) regarding the preparation of their Wills. He has not yet arrived since his car is giving him trouble and he lives in faraway Pimlico. Perhaps a little tea or coffee would help to ease the pain of waiting.
- 5 Melanie Whitfield (a twenty-year-old single parent) calls at the desk and wants to know if she can have a solicitor's letter sent to her neighbours who are having all-night noisy parties. You should explain the procedure for this type of work and then redirect her to the appropriate authority on this matter.

- 6 Sylvia telephones from Munich where she is attending a charity gala performance in aid of her favourite children's charity and demands to speak to her husband. She is using the charity office telephone and does not wish to be delayed due to costs; neither does her husband wish to be disturbed. Perhaps you should take her number and ask her to agree to her husband calling her back as soon as the client he is currently seeing has left his office. Think quickly – Sylvia can be very demanding, difficult and impatient. You should know all this – you've worked with her long enough to know all about it!
- 7 No sooner have you cleared the Sylvia problem than Deirdre (Sylvia's daughter) telephones and asks to speak to her father. He was rather short with you over the Sylvia telephone call. Do you think it wise to allow Deirdre to speak to him about her tuition fees for the Berlitz language course. Decide quickly whether or not this one can wait – at your peril!
- 8 There is a short lull for ten minutes just before coffee is usually served to the partners so you decide to update all your record books. Complete these accurately and legibly as they are the source from which, from time to time, information is taken on which fees and accounts are based. When you have completed the records, check them carefully, especially the times of appointments and the spelling of clients' names.
- 9 While you are completing the records, Melanie – the temp – flies past carrying a typewriter the wrong way around. Do not shout at her as she may panic and drop the typewriter. Give her a demonstration of how she ought to carry a typewriter and point out to her the importance of assuming a responsible attitude for her own safety in the office in accordance with health and safety at work regulations.
- 10 You use a VDU as part of your work and type routine letters and memos in between receiving and directing visitors. The tea-boy, Roger, is by nature a very inquisitive person and you have several times caught him staring at the screen reading the names of the people to whom you are writing. Take care to see to it that he does not get too much information about the goings-on within the business, especially as he has been known to be indiscreet with regard to those who visit the company. Perhaps a timely word in his ear about the great importance of security and confidentiality would not go amiss, especially since you see yourself not only as the head receptionist but also as a custodian of information of a very confidential nature. Who knows, in the near future when you have further proved your worth to the company, you may progress to an even more senior position within CC&J.

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# □ Assignment Six:

## Purley Wood & Associates plc

**Unit 4: Arranging Travel**  
**Element 4.1: Arrange travel and accommodation**

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**Target Time: 2 hours**

### Main Skills

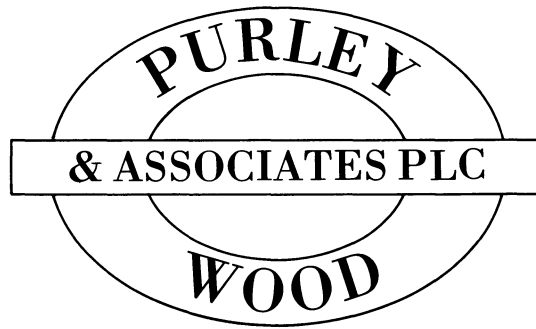
- 1 Travel, accommodation, entertainment and personal requirements of Mr T Wood – Senior Partner – and his associates to be identified
- 2 Preparation of clear, accurate itineraries containing all the arrangements made to be compiled well in advance of the date of departure
- 3 The maintenance of a proper balance between economy and the efficient use of time in accordance with Purley Wood & Associates plc's rules and procedures
- 4 Correct bookings selected, made and confirmed
- 5 Obtaining travel documents and checking for any discrepancies which should be immediately identified and rectified
- 6 Arranging correctly credit transfers, currency and travel cheques
- 7 Medical packs arranged for overseas emergency and high risk areas
- 8 Safe practices always followed and implemented
- 9 Security and confidentiality procedures are followed and implemented at all times

### Associated Skills

- 1 Using external resources, eg, travel agencies, banks, etc
- 2 Dealing with both oral and written communication
- 3 Dealing with financial transactions, national and international
- 4 Checking for accuracy in detail
- 5 Calculating the optimum cost, route, method of travel, etc

### Resources

Typewriter or Word Processor  
 Telephone training equipment  
*British Rail Timetable*  
*ABC World Airways Guide*  
*British Airways Shuttle Timetable*  
 Access to Telex  
 Access to Fax  
 Dictionary  
 Stationery – including headed paper, memo paper and envelopes, etc  
*AA/RAC Hotel Guides*  
*Michelin/Egon Ronay Restaurant Guide*  
 Books



**General Traders**

124 Mall Row, Croydon, Surrey SL10 4BT

Tel: 081 893 5613 Fax: 081 764 3419

Telex: 874001 PUWOAS G

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**Purley, Wood & Associates plc – Scenario**

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Up until one week ago you were employed as a junior clerk in the mail room of Purley, Wood & Associates plc in Croydon, Surrey. You have, however, excelled yourself through distinguished work and through the achievement of a national vocational qualification at Level II. Now, however, you are aiming for an award at Level III in Business Administration (Secretarial) and, in this regard, you have been promoted by Mr Tom Wood, the senior partner, to the position of Travel Clerk within the company.

Your mail room supervisor wanted this position but Mr Wood by-passed him and gave you the opportunity to prove your worth to the company. Therefore, you are still under scrutiny from all personnel within the company and particularly under the very critical eye of the mail room supervisor who is not particularly enthralled at the prospect of your promotion.

Mr Tom Wood does a great deal of travelling in connection with the work of the company and you are responsible for organising all his travel and accommodation – right down to the very last minute detail. While he is not terribly fussy about food or accommodation, his wife is terribly difficult to please. Be it Brixton or Bruges, she expects you to find them the very best type of accommodation and eating establishments available. This is something of a task as your predecessor left, due to her inability to come up to the high standard expected by Mr Wood's wife!

Nevertheless, Mr Wood has every confidence in your ability and he has told his wife that she is not to be quite so demanding. You are meticulous in your planning and will no doubt be able to please both of them.

Good luck with the work which lies ahead for you!



Congratulations on your recent promotion to the position of travel clerk with PWSA plc. This is surely recognition of all your hard work, both here in the company and also recognition of your Level II Business Administration Diploma from Croydon College.

My wife, Sabine, often accompanies me on UK journeys to our branches in the north but she is more keen to accompany me on my European travels. Sabine is from Germany and particularly enjoys my trips to Munich where she can spend lots of time in her favourite shops, especially Hertie, the Munich equivalent of Harrods.

I do not drive while abroad but my wife often does. Therefore, please ensure that her driving licence is: (a) valid; and (b) current - as she is sometimes personally negligent in this regard.

Sincerest congratulations,

Tom W.

Confidential[ Please shred when  
completed. Thx. you.  
Tom J. ]Projected journeys for \_\_\_\_\_ 199\_\_Please organise, for me, the following  
journeys:1/7/9- :

Croydon → Liverpool by train.

My meeting in Liverpool commences  
at 10 am at the North Street  
branch of PWSA plc.They will make the necessary  
luncheon arrangements, but you  
should telephone to ensure that  
this has been done. Peter's secretary  
is not always as well organised  
as we are in Croydon. If they  
ask for any hints, tell them I  
prefer lunch in Franks of Knutsford -  
a bit out-of-the-way, but company  
transport is available. I will  
travel back to Croydon, hopefully  
arriving at home in Shirley at 8 pm  
as it is Sabine's birthday.[ PS: Buy me a suitable card,  
order flowers from \_\_\_\_\_ to  
be delivered at 10 am and give me  
some suggestions for a suitable  
gift. ]£25-£30  
approx.

3/7/9- : Off to Munich until 7/7/9-. Book both Sabine and me on early morning flight (Lufthansa airlines) from Gatwick (if possible) - obviously it's closer.

NB: £1000 in DM for my company travel. Sabine will make her own f/curr. arrangements

We want to return mid-day (c) on 7/7/9-. Also book us into the Intercontinental (or similar) in Munich: double room: w/bath ensuite with adjoining reception suite.

[Full itinerary on A6 paper pls.

2 copies: one for Sabine.  
: one for me.

Obviously, you will retain a file copy - confidential.]

11/7/9- : Book shuttle (or similar) to Belfast International for me only. Sabine does not travel to N. Ireland and I believe this date coincides with a special celebration in N. Ireland. I will return to Gwydon on 13/7/9-. Could you book me into the Europa hotel in Central Belfast. Also, since I will be on my own, check to see what's playing at the Grand Opera House on 12/7/9- and book a table for four for 11/7/9- at 8:30pm for dinner at La Belle Époque,

probably from LHR unfortunately; arrange a minicab or taxi

Great Victoria Street, Belfast.

23/7/9 - :

F/currency:  
£5000: personal  
accant

T/cheques:  
£4,500  
Currency:  
£500

This is the last trip this month, you'll be glad to know. Then Sabine and I are off to Australia. Peter should have all these details on our personal travel file. (Can you, by the way, find me an International Time Zone Card - a small one please - as my pocket diary this year doesn't have one. Also could you forward plan to see to it that next year I do have same in my pocket diary?)

23rd: Gatwick → Manchester.

(I'll return the same day, as late as possible).

1st meeting: 10.15 am Central Manchester.

Sabine will accompany me!

Find a suitable restaurant (you know my tastes by now) and book a corner table for two people for 1.30 pm.

Note: Use Thomas Cartwright Travel only for all company travel. Charge all company travel to T. Wood No. 3 Account. All travel for Sabine, charge to T Wood No. 5 Account (my personal account).  
—————\*

Although it is probably unnecessary to point out, do not under any circumstances disclose any of my travel plans to other staff, excluding Peter (the other senior partner). Refer all such queries directly to me.

Also, for the NI trip: tell Sabine I am in London on official business and you do not have a No. to contact me. However, if she calls on 11/7/9-: contact me at He Europa; get them to page me a.s.a.p.

Could you also ascertain which inoculations we require for our Australian trip and consult with Sabine in this respect re: setting up appointments for same, if necessary?!

I require detailed:

- (a) itineraries;
- (b) tickets (in advance of departure); and
- (c) envelopes containing all meeting papers at least 24 hours before date of departure, for each journey.

Also, ensure that I am fully and properly insured (also Sabine) for all our trips!

TW

**MEMORANDUM**

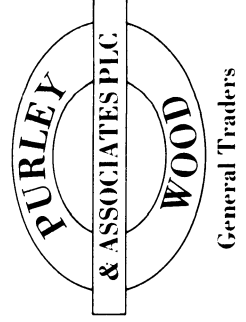
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**Subject:**

**MEMORANDUM**

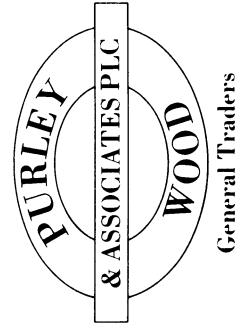
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**Date:**

**Date:**



General Traders



General Traders

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# □ Assignment Seven:

## Ransome, Peters & Brownlees

**Unit 4 Arranging Travel**  
**Element 4.2: Plan and organise business visits**

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**Target Time: 2 hours**

### Main Skills

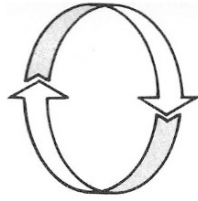
- 1 Planning and organising business visits after establishing the requirements for meetings within RP&B and other companies
- 2 Obtaining essential information and identifying individual contacts
- 3 Making special arrangements for social and/or informal contacts within travel schedules
- 4 Planning visits to operate within a prescribed time schedule
- 5 Making allowances for unspecified events within the programme of travel
- 6 Preparing travel programmes, including purpose and agenda, for the visits and distributing same in advance
- 7 Making and confirming arrangements for meetings
- 8 Preparing detailed meeting briefs for Mr Alfred Peters (principal) accurately and as directed
- 9 Following and implementing safe working practices at all times
- 10 Following and implementing security and confidentiality procedures at all times

### Associated Skills

- 1 Researching relevant information
- 2 Communication skills – oral and written
- 3 Planning and prioritising appointments within specified time schedules
- 4 Preparing information briefs

### Resources

Typewriter or Word Processor  
 Access to Fax  
 Access to Telex  
*ABC World Airways Guide*  
*British Airways International Timetable*  
 Dictionary/on-line spelling verification  
 Stationery – including headed paper, memo paper, postcards, compliment slips and envelopes, etc  
*AA/RAC Hotel Guides*  
*Michelin/Egon Ronay Restaurant Guide*  
 Books  
 A4 plain typewriting paper  
 Photocopying/xerox equipment  
*Telephone directory and Classified directory (UK)*  
 Telephone training equipment



**RANSOME, PETERS & BROWNLEES**  
— ACCOUNTANTS —

567 Milton Highway, Milton Keynes, MK13 6JK

Tel: Milton Keynes 908678 Fax: Milton Keynes 935467 Telex: 905647 RAPEBR G



## Ransome, Peters & Brownlees – Scenario

After only seven months as an accounts clerk at Ransome, Peters & Brownlees you decide (after much consideration) that accounts are not for you. You do, however, very much like the company for which you are working and are in a difficult situation. You do not want to give up your job and you do not want to leave RP&B; you do, however, know quite well that you could not (under any circumstances) spend the rest of your life (or even another day for that matter) totalling accounts and receiving payments from clients for services rendered.

You decide, therefore, to speak directly to Mr Alfred Peters – the principal – and to tell him the truth. He is not in the least bit shocked; in fact he is very pleased to find that you are able to talk so openly to him about your situation.



As in the past, Mr Peters has a solution to what he refuses to acknowledge as 'a problem'! Valerie, in Travel, is due to go off on maternity leave at the end of the week and, even after two days of solid interviewing, the company has been unable to find a suitable replacement. Valerie has indicated that, after she has her baby, she may not be coming back to work as her husband has just received promotion and she would prefer to be at home with the new child. This situation is absolutely made for you; you could simply move sideways within the company as your Level II Diploma also included some travel bookings and accommodation work, including the use of information technology.

Mr Peters offers you the job on Friday and on Monday morning you arrive at work to be shown to your new desk where you find the following handwritten note from Valerie who is delighted to be able to stay at home to relax in preparation for the arrival of her baby.

Congratulations on your appointment to the position of temporary replacement travel clerk. I'm very tired now and I've already worked ten days more than I need have done - I know Mr. Peters did appreciate this mind you; he gave me a beautiful crystal decanter as a reward!

Do remember that loyalty to the company (any company) does bring rewards - eventually! Mr. Peters was very glad that you felt comfortable enough to tell him exactly how you felt, although I know you were very tactful and gracious about the matter.

At any rate, the baby will arrive soon (hopefully) and I (as you probably know) hope to be able to resign my position, although I am very happy at my work. Richard has recently been promoted in his company (legal) and I will (fingers crossed) be staying at home with our baby. This will give me time to finish my Open University degree - I hope!

Mr. Peters would not mind me advising you that he is very absent-minded about travel arrangements. He will suddenly remember things at the last minute

and sometimes he gets into a terrible rage! I warn you!! Do not let this put you off. He also gives you only minimal information and, as a result, you will have to carry out quite a bit of desk research.

Always allow time in his schedules for "the unexpected". He thinks he can get from Highgate to Whitechapel in a taxi in 15 minutes, and he allows the minimum amount of time for meetings. If he says one hour allow an extra 30 minutes to keep the schedule reasonably tolerable for him. If you plan everything as he asks for it, you may find he will complain, on his return to the office, about the tightness of his programme.

Notwithstanding, you should enjoy the work. RPB had plans for your promotion to Senior Accounts Clerk, as you know, but I, personally, feel that you have made the correct decision by being absolutely forthright and honest.

Good luck in Travel. I hope all goes well for you. I will pop in from time to time to see how you're getting along - nappy-changing permitting.

Regards,  
Val.

As Valerie has probably already pointed out, I am not always very well-organised. While you were working as an accounts clerk you proved, beyond doubt, that you had excellent organisational skills. You will need to exercise these skills when you organise my travel arrangements, as follows:-

- ① I need to travel on Monday --/--/9- from Milton Keynes to our main office in London. I prefer to travel by train - 2nd class will do - non-smoking. Choose a train with a buffet car as I like to be able to grab a sandwich on the journeys to and from London. I'd like to leave around 9.00 am and to get back by 6.00 pm as Helen's sister is home from Canada and we're having a special party for her at our house in Coventry at 8.00 pm.
- ② Wednesday --/--/9- : book me a flight from Birmingham to Aberdeen (if possible). I don't want to travel to Scotland by train and definitely not by car. I'll stay overnight. I'd prefer to leave around mid-day so that I can tidy up last-minute business at my desk in the morning.

Remind me on Tuesday afternoon (in writing - a short memo!) to pack a bag as I'll be staying overnight. Book me into a 2\* tourist hotel.

- ③ Next Thursday --/--/9- : Dirk Zachmann - a German entrepreneur - is coming to visit us in London. Arrange flights for him from Frankfurt to London (mid-morning arrival in London: Heathrow preferably). Book him into The Strand Palace (THP) - good quality room with facilities. We will pay for all his travel and accommodation expenses as he is helping us with our international plans. He plans to fly back to Munich (not F/fort) on Sunday --/--/9- at tea-time (around 6pm). Our business will be finished by mid-afternoon Friday, but Dirk plans to take in a few shows and some sightseeing. He will meet all such expenses himself, but we will, of course, pay his full travel and accommodation account. Arrange tickets on departure at Frankfurt on Thursday. He will travel by taxi to The Strand Palace. Perhaps you could telex/fax his

office in Munich with the address and telephone number of the hotel. Mark the message for his urgent attention. If he calls, at any stage, during his stay in London let me know immediately. He is a v.i.p., as far as we at RPSB are concerned.

④ On the last Tuesday of this month I will be leaving the UK (Birmingham) for a three-day conference in Paris.

Book me an economy flight to Paris - very early Tuesday --/9- and on a return flight on Friday --/9-, also early-morning as I would like to spend some time in the office on Friday to tidy up any urgent matters before the weekend, although, as you are probably aware, I frequently come into the office on Saturday mornings, although I do not take appointments.

While in Paris, I will have 3 evening meetings:

Tuesday 7.00pm (French time): Josef Zellner from Germany at the Intercontinental.

Wednesday 6.00pm (F. time): Hubert Cooper from Bristol at Charles de Gaulle airport.

Thursday 4.00pm (F. time): Sabine Wintermeier from Germany at the conference venue.

At all three meetings I want to discuss the following:

- ① The question of 'goodwill' on the balance sheet;
- ② European accounting standards control mechanisms;
- ③ Ecu issues affecting the accounting function; or
- ④ Possible satellite offices in Germany and Switzerland - logistics of.

Please prepare a detailed brief for each of the three meetings: one copy for me and one for each person being met. Leave at least  $\frac{1}{2}$  of an A4 page for each area to be discussed. I will scribble notes in the blank space and Amanda (my secretary) will type these up in the proper format upon my return.

The conference is really only an excuse to meet these people who are very influential. Also please prepare a pack for each giving details of our company and its operations to date in Europe as well as our major operation schedules in the UK and Northern Ireland.

NB. Allow for unspecified events in the programme, eg, traffic jams. (Paris is notorious for these in rush/peak hours) - or flight delays.

Also, Europeans can be very hospitable and may offer cocktails or dinner which would prolong each meeting.

Prepare detailed:

- Ⓐ itineraries for each meeting;
- Ⓑ briefs: to be sent to each guest at least seven days in advance of the meetings.

NOTE: mark all briefs, agenda and itineraries STRICTLY CONFIDENTIAL and highlight these words in green or blue.

Also: much of my work within the company is far-reaching and many of the junior partners know little (at this stage) of my plans for the future of RP&B. All information given on these sheets is CONFIDENTIAL in the extreme.

Any false starts or attempts should be carefully shredded and you should ensure that no-one knows the password for your terminal, especially Mrs. Peters (my wife) who, from time to time, between shopping trips, drops by to see how we're all doing. She considers any business with females to be 'dangerous liaisons'. Therefore, I do business only with males. In other words:



no mention please (in front of Mrs. P.) of a meeting with Sabine Wintermeier in Paris.

Also: type on a postcard the address of the British Embassy in Paris - also the tel. no.!

I will stay at The Mitterand, rue Royale, during the Paris conference, should there be any emergencies!

Please make all the foregoing hotel and booking arrangements as quickly and as soon as possible and in order of priority - obviously! Then confirm all arrangements in writing, taking a file copy and a copy for my briefing notes so that I have evidence of all arrangements should anyone query me. Also, place all receipts of confirmation in my briefing notes files, each of which should be marked ①, ②, ③ and ④ - no labels saying 'Paris', Swinda, or whatever, please!

Good luck. Valerie was marvellous. See if you can equal her for organisational excellence.

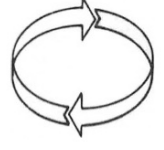
Alfred Peters

MEMORANDUM

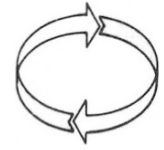
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MEMORANDUM

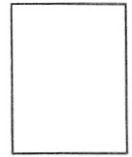
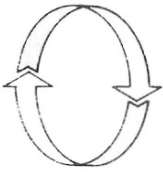
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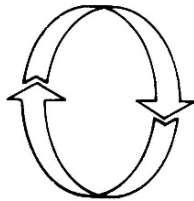
RANSOME, PETERS & BROWNLEES
ACCOUNTANTS



RANSOME, PETERS & BROWNLEES
ACCOUNTANTS



**RANSOME , PETERS & BROWNLEES**  
**567 MILTON HIGHWAY**  
**MILTON KEYNES**  
**MK13 6JK**



**RANSOME, PETERS & BROWNLEES**  
— ACCOUNTANTS —

567 Milton Highway, Milton Keynes, MK13 6JK  
Tel: Milton Keynes 908678 Fax: Milton Keynes 935467 Telex: 905647 RAPEBR G

WITH COMPLIMENTS

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# □ Assignment Eight:

## Walker plc

**Unit 5: Preparing and producing documents**  
**Element 5.1: Produce text from oral and written material using an alphanumeric keyboard**

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**Target Time: 2 hours**

### Main Skills

- 1 Producing error-free documents from screen, manuscript and amended typescript within a restricted period of time
- 2 Producing error-free documents from pre-recorded speech within a restricted period of time
- 3 Producing, from brief notes and spoken instructions, error-free documents composed within a restricted period of time
- 4 Identifying and remedying any uncertainty in the source text in order that the intended meaning is conveyed
- 5 All documentation to be presented in accordance with the organisational house style using accepted conventions
- 6 Reporting any equipment faults or dealing with same promptly
- 7 Arranging work schedules to accommodate changing priorities and deadlines
- 8 Following and implementing safe working practices
- 9 Following and implementing security and confidentiality procedures at all times

### Associated Skills

- 1 Using appropriate keyboarding techniques in order to produce documents
- 2 Accurate and acceptable document presentation
- 3 Using dictionaries and other reference sources
- 4 Proofreading and correcting documents using proper techniques
- 5 Prioritising tasks

### Resources

Typewriter or Word Processor or Computer Terminal  
 Dictionary or on-line spelling verification system  
 Notes for composition of letter – attached  
 Manuscript for document preparation – attached  
 Material to be prepared on audio-tape for document preparation – attached  
 Correction materials  
 Stationery – including headed, memo, labels and envelopes, etc  
 Interruption task  
*Secretarial Handbook* – reference only



**WALKER** PLC  
BOATBUILDERS

Tranmere Lane, Borehamwood, Hertfordshire SA34 5JN  
Tel: Borehamwood 9870 Fax: Borehamwood 7868  
Telex: 986751 WALKER G

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## Walker plc – Scenario

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Some months ago you went along to Walker plc for an interview as a principal telephonist/receptionist but you were very disappointed when you learned that you were not given the position.

You were, however, fortunate enough to be offered the position of clerk-typist; Mr Walker pointed out to you on that occasion that the girl who had been doing the job temporarily had performed best in the test and at the interview, but he had no hesitation, when he reviewed your qualifications, including a Business Admin Level II Diploma, in offering you the post which you, in a rather disappointed manner, accepted as you had already had several other interviews and had little success – through no fault of your own, but simply because of the highly-qualified opposition on each of those memorable occasions.

Walker plc is expanding and business has never been better despite desperate attempts by the opposition – Errickson Boatbuilders – to outwit the Walker Boatbuilding organisation. Mr Walker is now in the very nice position of recruiting more staff for his company and, luckily as well as deservedly, for you, he is also hoping to offer several promotions within the company to those staff who have proved their worth and loyalty to the company.

Elizabeth in Personnel has left you the following short note indicating that, during the next few days, your work will be very carefully monitored and reviewed as a possible post for senior staff in the clerical/document production area may well be on its way to you, if you can sustain your very high level of output. Read Elizabeth's note very carefully; it contains much good advice and then carry out the tasks assigned to you in the best way you know how. The work includes many spelling errors which you should alter along with any obvious grammatical faults.

Good luck with your tasks and good luck in the promotion stakes!!

I'm sure you've seen the notices in the reception area about the forthcoming promoted posts at Walker plc. Understandably this is causing a few ripples of excitement here and there.

I always advise junior members of staff to be very careful at such times as much damage can be caused by discussing such a delicate subject with the wrong people.

Some new recruits - particularly well-qualified - would as you know be eligible to apply for some of these posts.

We at Walker plc are constantly monitoring the progress of all our staff, but, only the most able and most-deserving get promotion.

Interview performance is also very important and much depends upon a good impression being formed on such occasions.

We are looking particularly for versatile staff who can use manual typewriters, word processors, fax, etc. Also important is good document presentation to our very high house style standard!

Accuracy is vitally important as is speed of production and the eventual presentation of all documents prepared. Folders please: labelled Mr. Walker, Mr. Murray, Ms. King, etc!

Confidence and expertise in dealing with interruptions is also taken into account. One must not neglect to handle all interruptions diplomatically and in a tactful manner.

We allow for the fact that most candidates are initially nervous but we expect the highest standard of work from all our staff.

---

Elizabeth W.



**Note to Tutor**

The attached manuscript – handwritten – is also suitable for recording on audio-tape for presentation to students for document preparation.

The material should be dictated, preferably office-style, within the range of 80 to 100 words per minute – or faster, if within the ability range of the students.

Please prepare the following memoranda:

From: T J Walker  
 To: Ann Wilks  
 Date: today's  
 Ref: TJW/yr. initials.  
 Subject: Car parking

N.P.

Please note that, until further notice, the car parking space allocation issued in May still stands. [ This situation is currently under review and a new allocation will be send to all staff in due course.

Send this memo to EJ Tohill and BF Clarke

---

From: T J W ———  
 To: Tom Quinn (stores)  
 Date: today's  
 Ref: as above  
 Subject: Engine parts supplies

It has come to my attention that supplies of engine parts for Victoria II are not sufficient. I require a written report by the end of this week:

- (a) giving reasonable explanations; and
- (b) a statement of your intention to remedy this situation!

Personal letter to dentist:

Graham, Mus-8 Allen, Dental Surgeons, 129-133 Pan  
Road, Basingstoke, Hants. RF24 2LK.

Attention: Mr. Mervyn Sloan.

Dear Mr Sloan,

I am in receipt of your account for treatment  
administered to my wife Elizabeth between the  
1st and 28th of last month and note that you have  
listed four treatments - each Tuesday during the  
month.

Upon checking with my wife, she informs me that  
she had only three treatments and they were  
all on Friday mornings. In fact, the last date  
you cite was an occasion when Elizabeth  
accompanied me to a Yachting Club Show at  
Cannes.

Please have this account chequed and altered.

Also, I might add that, while I am aware of  
the fact that the best dental surgery costs a lot

of money, I do find your account for £524 more than a little excessive. My wife had had had only two gold fillings and a cheque-up. Can you perhaps further explain such an extremely steep account?

I look forward to hearing from you in the near <sup>future</sup> and, upon receipt of a satisfactory explanation, I will forward payment by return.

Yours \_\_\_\_\_  
T J W ——— Esq.

On plain paper pls.

Copy: personal file

Copy: Elizabeth

NB Make this letter Urgent &  
Private and Confidential.

Also ask for a speedy reply. Fix up the letter and correct any spelling errors, although I don't usually make any. Ha! ha!

Notice to be prepared on Walker plc headed (A5?). 6 copies please, for all company noticeboards, excluding Stores.

Walker-Hart International  
(New York)

will present a four-hour  
Seminar

on  
Office Ergonomics

in  
Conference Room Four

in full  
please

on

--/--/9--

from 0900 (hrs) until 1300 (hrs)

If interested, please memo David Adams in Planning. The fee of £25 per person will be paid for all approved personnel by Walker plc. Confirmations will be sent out 10 days in advance of the Seminar.

right-align

→ TJ Walker → ||

Letter to: Ms Lynn Frazer, 50 Hillingshead Way,  
B'wood, Herts. SA36 5TL.

Dear Lynn,

I write to express my extreme disappointment at the manner in which you behaved towards Tom Peterleigh, our safety officer.

Personnel have advised me that, during the six months prior to the incident, you had been suffering blackouts due to sitting in front of your VDU for periods sometimes exceeding four + five hours.

Our medical adviser - Dr Mary Peters - advised you, as one would have expected, to take more frequent breaks to carry out other associated duties, eg, filing, plant watering, etc., and to avail yourself of some visual relief, even if only for five minutes in each hour. You, I am told, disregarded this medical advice.

I understand that, when Tom Peterleigh approached you to offer you a copy of a recent report on VDUs, you flew into a complete rage, swore at him and stormed out off the office. This behavior is quite unnecessary and must not be allowed to continue at Walker plc. We, in

this company, pride ourselves on high standards of professional behaviour.

I, therefore, expect you to personally apologize to Mr. Pugh without delay and I also want to speak to you personally upon your return to work next Monday.

I might add that, until this incident, we were very happy with yr. work and conduct and we were quite prepared to omit any record of this outburst from your personnel details. I do, however, feel obliged to advise you that any future occurrence of this kind will not be tolerated.

In the meantime, I wish you a full and speedy recovery. Please read carefully and implement the enclosed report on 'VDUs and your Health' before your return to work.

I look forward to seeing you on Monday,  
--/--/9-

Yours \_\_\_\_\_  
TJW

Enc.

MB : copy: day file only.  
No copy to Ms Fragers  
personnel file, as promised.

Letter to be composed:

Stephen Long-Nelson of County Cars telephoned this morning to advise me that my BMW 530i is due to be serviced within the next month. I was on the other line.

Also: indicate that the reply should be sent directly to me marked 'To be opened by addressee only - Confidential.'

Write back explaining the following:

- 1) I want to trade-in this car for a new 320i convertible.
- 2) I need the new car within four weeks.
- 3) I will also be buying a new 316i for Barbara who is graduating from Sheffield in July.
- 4) I need a quotation also for the company jeep (Suzuki Vitara - June 1989).

Ask for all this information in writing and address it to Mrs S.L.N. at:

County Cars,  
Longacre Road,  
Thames Ditton.  
GF23 7JB

Send it recorded delivery and mark it CONFIDENTIAL.



Interruption task:

[To be handed out after 30 minutes].

A group of six American yachtsmen have arrived unexpectedly to see around Walker plc - possibly investing some of their dollars in the company if all is to be believed.

Angela, the tea-lady, has gone early to fit in a dental appointment, and there is no-one else around to prepare afternoon tea.

Could you possibly leave your tasks and prepare tea (with a choice of coffee) for eight people. Mr. Walker and Ms. Iris King will entertain the American yachtsmen in Conference Room 2.

Best china please - milk and cream - brown and white sugar. Boardroom silver spoons, etc. You know the form.

Thanks,  
EW.

**MEMORANDUM**



Date

From

To

Subject

**MEMORANDUM**



Date

From

To

Subject

---

# □ Assignment Nine:

## Peters & Jones plc

**Unit 5: Preparing and producing documents**  
**Element 5.2: Present narrative, graphic and tabular information using an alphanumeric keyboard**

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**Target Time: 2 hours**

### Main Skills

- 1 Producing error-free documents of approximately 300 words from a variety of sources within a restricted time period
- 2 Identifying and remedying any uncertainty in the source material in order that the intended meaning is conveyed
- 3 All styles and formats should be presented to acceptable house standard using acceptable conventions
- 4 Reporting any delays to Mr Timothy Jones – the Administration Manager – which might mean the failure to meet any deadlines set
- 5 Ensuring that information produced correctly reflects the source from which it was taken
- 6 Following and implementing safe working practices
- 7 Following and implementing security and confidentiality procedures

### Associated Skills

- 1 Using appropriate and accurate keyboarding techniques
- 2 Constructing narrative, graphic and tabular modes of information presentation

- 3 Combining material in a logical sequence
- 4 Using a variety of reference sources
- 5 Extracting relevant information from a variety of sources
- 6 Using acceptable proofreading and correction techniques
- 7 Using suitable computer applications, ie, input and output, and use of software packages
- 8 Prioritising tasks

### Resources

Typewriter or Word Processor or Computer Terminal  
 Dictionary or on-line spelling verification system  
 Manuscript and notes for document presentation  
 Correction materials  
 Source materials – attached  
 Stationery, including headed, memo, labels and envelopes, etc  
 Interruption task  
 Computer software packages  
 Reference books  
 Desktop publishing system (or software for Computer)  
 Access to viewdata



# PETERS + JONES

Consulting Engineers

Mitchell Street, Copthorne, West Sussex RH10 3PS · Tel: Copthorne 489130 · Fax: Copthorne 789013 · Telex: 890135 THORNE G

## Peters & Jones plc – Scenario

Unlike many other engineering companies these days, Peters & Jones plc is growing and expanding at a terrific rate much to the surprise and chagrin of its many competitors.

Mr Timothy Jones – the son of Mr James Jones – is the Administration Manager and, under his supervision and tuition, together with additional day-release training after acquiring your Level II Diploma in Business Administration, you have been promoted to the position of senior clerk/typist in the company's head office in Copthorne, West Sussex. The London office is simply a small flat in Seven Sisters belonging to Mr Allen Peters – the other partner in the company. It houses a secretary who works only mornings, but with current plans for expansion, he could soon be working full-time in the flat which is only infrequently used by Allen as a *pied-a-terre* on his irregular weekend theatre trips to the city.

As Peters & Jones has expanded, the engineers have had to become more *au fait* with information technology in the form of CAD/CAM equipment which makes their work so much more straightforward and interesting. You too, have had to encompass word processing, computer technology applications and desktop publishing software. You are now, after a period of six months in using the equipment, fully in control of the technology, whereas, at the beginning, you had the express feeling that it was very much in control of you.



Mr Timothy is a fine man to work for but he is very demanding and, as you have grown to know more and more about the operation and personnel of the company, he gives you less and less information each time he assigns you a task to perform. For this reason, you have to extract information from a variety of sources, viewdata, books, files, price lists, etc in order to complete your work. Read carefully the following memo he has left you and carry out all his requests for his return to the office at 3.45 pm this afternoon. Remember to prioritise your work and to deal with any emergency situations in your usual tactful manner.

Sorry, yet again, to leave you with a list of tasks to execute; unfortunately I'm off to London to our Seven Sisters office. I'll be there all morning, meeting a client for my father. Stephen Matthews, our part-time secretary, will be at the telephone 071-738 0801 until 1pm, so if there are any major dramas or problems, you can contact me on the above number. This number is also the private number of Allen's private pied-a-terre in town and he would be absolutely horrified if all and sundry knew his private weekend contact number. I know I can rely on you.

I will be back by 3.45pm this afternoon, so it would be terrific if you could have the following list of items ready for inspection, upon my return. If, however, you feel that you will be unable to complete any of these tasks, please let me know. My car telephone number (again, confidential) is 0860 : 82961.

You should set aside time to source the tasks, as I have, again I hear you say, given you only the bare bones of the information. You appreciate, I know, just how very busy I am. Perhaps, in the near future, when you obtain your Level III Diploma, you will become Administration Manager and I will, at last, become a junior partner in P&J plc: wishful thinking. Destroy this note as soon as you have carried out the tasks and remember to follow and implement, at all times, secure and confidential working procedures.

Any false starts should be carefully shredded as the office grapevine soon catches on to any new plans for expansion, promotion, growth or rationalisation, etc.

Good luck.

See you © 3.45 pm.

Tim J.

① Here are notes of the minutes of our last  
 uc safety co-ordinating committee (in brief).  
 Please expand, word process and print three  
 copies on A4 plain paper.

Present: A Peters; James Jones (in the chair);  
 MM St Leger; and Tim J.

Apologies: PJ Peters and WM Clare

Minutes agreed and signed.

No matters arising.

- (i) Fire doors: to be looked into before  
 next mtg. on the last Friday of next  
 month (insert date).
- (ii) Fire escape: estimates obtained for  
 repair:

- (a) Dalzell's : £ 5200 + Vat.  
 (b) Arbutnot's : £ 4875 + Vat.  
 (c) Greene's : £ 2150 + Vat.

[ Give total + Vat = £ \_\_\_\_\_, ie,  
 £ 5200 + Vat @ 15% = £ Total.

~~\_\_\_\_\_~~



Minutes cont'd.(iii) Smoking policy @ P&J plc:

Complete office & reception areas to be designated no smoking zones. Notices to be clearly displayed and all staff to be memoed. Ashtrays to be removed.

A O B

A. Peters requested a visit from the Fire Department to ensure that the new extension meets with local bye-law regulations. Agreed that this should be done a.s.a.p.

Date of next meeting: see earlier page, last Friday of next month.

Note:

prepare in double line-spacing to allow room for any alterations or expansion which I may decide to be necessary.

Tim J.

- ② Allen is keen to see us make more full and extensive use of the desktop publishing equipment recently purchased for our company.

Prepare the details from ① re: fire escape estimates as a bar graph or histogram and also as numerical/narrative matter on one page of A4 paper.

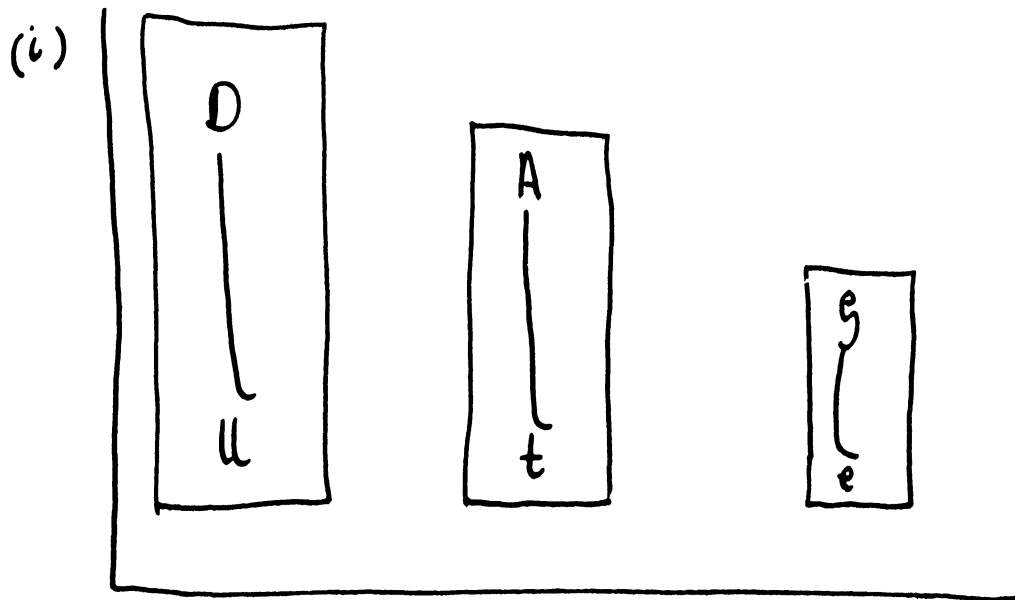
If the equipment does not afford us this facility, simply cut & paste. I'm sure, however, that it will.

Display as follows, overleaf, on

A4 paper:



m/f.



(ii) D ————— u

A ————— t

g ————— e

Narrative: the above illustrates...

.....

Interruption task:

[To be handed to the student after 20 minutes]

To: Senior Clerk/Typist.

From: Allen Peters

Could you please, as a matter of some urgency, replace the No Smoking notice in reception.

The notice you prepared some months ago has mysteriously disappeared and, despite repeated requests to your replacement to find a replacement notice, one has not as yet appeared.

Only today I, again, found several clients smoking in reception and I also noticed that Mrs. Every-Clayman looked suitably put out by this aspect. Please arrange

IMMEDIATELY! to have a notice displayed which clearly indicates that our office and complete reception suite is a definite 'NO SMOKING ZONE'.

Sorry to land this on your desk, but as Tim is in London today, who else could I depend upon to carry out this task.

Thanks (again)  
Allen P.

PS. perhaps you could prepare this notice on the desktop publishing system.

Also, see if you can find any figures or data illustrating just how unpopular smoking really is.

---

**What If Task**

---

You are in the middle of word processing the minutes of the Safety Co-ordinating Committee when the word processing system breaks down. What do you do?

- (a) Do you simply abandon the word processor?
- (b) Do you seek to repair it to the best of your ability?
- (c) Do you bother to read the repair manual which is virtually incomprehensible?
- (d) Do you telephone the repair engineers?
- (e) Do you seek assistance internally, ie, within P&J plc?
- (f) Do you transfer your work to the electronic, electric or manual typewriter?
- (g) Do you telephone, as he has suggested, Timothy who has by now left Seven Sisters and is in his car, a Rover 820i, on his way back to Copthorne?

OR

- (h) Do you decide to take another course of action?

Be prepared to give your reasons to Timothy upon his return; you know exactly how demanding he is and how much he depends on you!

# MEMORANDUM



Date:

From:

To:

Subject:

---

# □ Assignment Ten:

## Greenwood & Goodwood plc

**Unit 5: Preparing and producing documents**  
**Element 5.3: Organise and arrange the copying, collating and binding of documents**

---

**Target Time: 2½ hours**

### Main Skills

- 1 Selecting and correctly using reprographic equipment and materials cost-effectively
- 2 Preparing documents correctly for reproduction
- 3 Producing copies of appropriate quality from original documents
- 4 Collating, fastening and distributing correctly copies taken, and the original documents
- 5 Reporting equipment faults and dealing with same promptly
- 6 Keeping wastage of materials to an absolute minimum
- 7 Conveying precise requirements to colleagues and confirming where appropriate
- 8 Delegating tasks to others accurately and monitoring progress
- 9 Planning and monitoring work progress to meet all deadlines set
- 10 Keeping records up-to-date, legible and accurate
- 11 Following and implementing safe working practices at all times
- 12 Following and implementing security and confidentiality procedures at all times

### Associated Skills

- 1 Operating reprographic equipment safely and efficiently
- 2 Supervising and supporting the work of junior staff
- 3 Allocating resources economically
- 4 Maintaining effective working relationships with superiors and junior staff
- 5 Prioritising tasks as appropriate to the work situation

### Resources

Typewriter or Word Processor  
 Photocopier with enlarge/reduce function together with collating and binding options (if possible)  
 Scissors  
 Glue  
 Stationery – A4, A5 and A3 sizes  
 Paper for use in photocopier  
 Memo paper  
 Manuscripts for preparation – attached  
 Binding equipment (if not available on reprographic equipment to be used)





# *Greenwood & Goodwood plc*

## WINE MERCHANTS

1254 Tunbridge Road, Reading, Berkshire BA34 5JM  
Tel: Reading 345678 Fax: Reading 871203  
Telex: 984658 GREGOO G

## Greenwood & Goodwood plc – Scenario

You are personal assistant (recently promoted) to Anne Greenwood, a partner in Greenwood & Goodwood plc – the wine merchants of wide acclaim throughout the United Kingdom and further afield.

Anne is fairly well-organised but one of the principal reasons why she has had you promoted from secretary status to Personal Assistant is that she knows she can rely on you to use your initiative. She also knows that you are excellent at the fostering and maintenance of good working relationships with others in the company, which is rapidly expanding thanks to the very dedicated and hard work of Anne and her other partners. She has had an additional burden this year as Ian Ball, one of the senior members of the company, has been extremely ill with heart trouble and it looks most unlikely that he will be returning to work before the end of the year. Therefore, she has additional work to carry out; you are therefore invaluable and, as she so often puts it: you are her 'right arm'.



This means, in essence, that as well as carrying out your own duties as personal assistant you also have to supervise the work of junior staff. Anne is a frequent traveller to Europe in search of new wines, etc and recently she has been extending her travel to Australia, New Zealand and Chile in search of the more popular wines for the cheaper and fast-changing sector of the wine market. It is not unusual to arrive at work to find that Anne has left on a flight to Chile without any prior warning. In her absence, however, you are left with lots to do including her usual midnight notes which she has 'flown into the office' to place on your desk!

Today is such a day. Good luck as you execute, painstakingly, the attached list of duties for Anne who has just lifted her 'always-packed' suitcase and flown to New Zealand for an urgent meeting – last-minute as usual! Hold the fort!

I know that you'll find this difficult to believe: I'm off (again, I hear you say) to NZ for a four-day trip, bang in the middle of our southern region marketing campaign. ~~But~~ Nevertheless, Peter G. can handle this with both his hands tied behind his back.

It's great (really) to have you around; I know that I can depend entirely on your loyalty and support and I especially value all the extra hours you work, especially since the illness of dear I on.

Please telephone him and let him know I am in NZ again. Tell him I will come to dinner with Tom and his wife Margaret as soon as ever I return from my travels. NZ looks exciting for G. & G. plc. There are so many excellent wines available here at "snip" prices. The UK market, I fear, may well become saturated with NZ plonk.

Please supervise the junior staff while I am away. Make sure they attend College for their day-release diplomas in Business Admin. Level II. Encourage them gently but firmly. I know that they respect you because they know that you are a product of this very excellent type of training.

Get some of the juniors to type up the following manuscripts and then have them copy and bind them for my return.

As usual, when I return, I will probably work from home for the first day where I can deal with as much work as possible by telephone and e-mail. It's marvellous being able to send messages to you at the office from home, although it can be an awful invasion of my personal life and often leads to lack of privacy. Tom absolutely hates it.

See you in four days' time.

Anne G.

① Get one of the juniors to key-in this I & E a/c for the local university wine club, of which I am, for my sins, Treasurer.

### University Wine Club

#### Income and Expenditure Account for the year ended 31 December 199-

<u>Income</u>	<u>199-</u>	<u>199-</u>
Subscriptions	34	52
Wine invoiced to members	1978	2727
Wine tastings	130	—
Wine Club Dinners	615	1523
	<u>2757</u>	<u>4302</u>

#### Expenditure

Wine supplied by G & G plc	1131	1329
Wine supplied by Cantell plc	993	1692
Wine supplied by Fairman & Co	130	283
Dinners (excluding wine)	472	980
Stationery & bank charges	—	5
	<u>2726</u>	<u>4289</u>
	<u>31</u>	<u>13</u>

[P.S.]

→ I need 60 copies of this on A5 paper. A4 would be too large.]

(2) Now the balance sheet (also 60 copies on A5 papers)

\_\_\_\_\_

U ——— W ——— C ——— b.

\_\_\_\_\_

Bal. sheet as at 31 December, 199-

Sources of Finance

Accumulated funds at 31 December 199-

Balance at bank	31	18
<u>ADD</u> excess of income over expenditure for yr. ended 31 December 199-	31	13
	<u>62</u>	<u>31</u>

Employment of Finance

Current Assets:

Sundry debtors	nil
Cash at bank	62
	<u>62</u>

Deduct

Current Liabilities

Sundry creditors	<u>nil</u>
------------------	------------

<u>62</u>	<u>31</u>

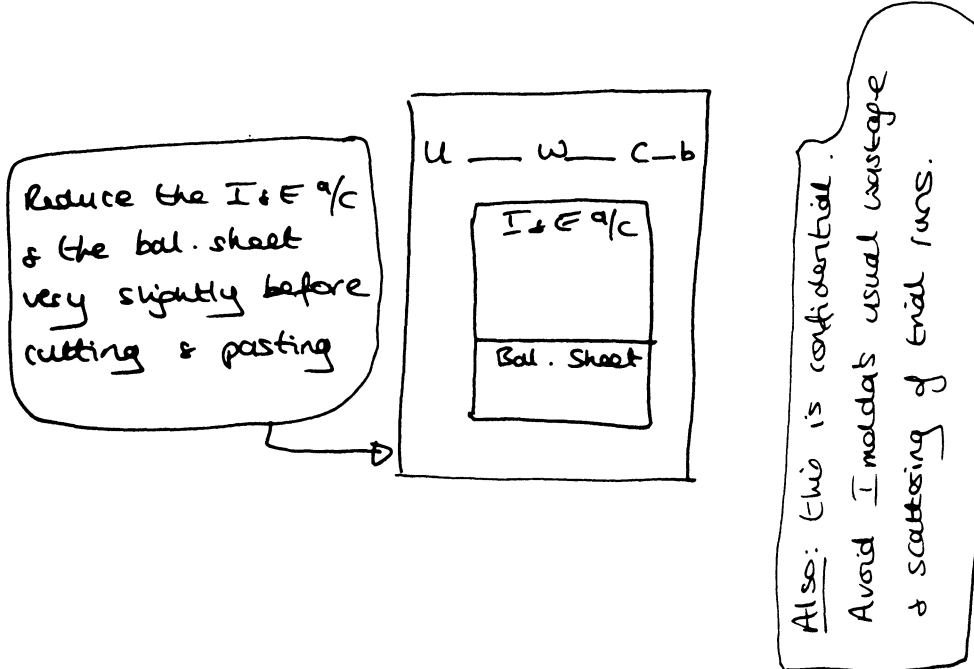
- 3) As requested (in a wallet folder) - to be marked University Wine Club (white label please) - 60 copies of the I & F a/c and 60 copies of the Balance sheet - both on A5 paper.
- 4) For me and the other Committee Members, please prepare an A4 sheet containing the I & F a/c and the Balance Sheet on the one page.

Do, however, remove the second

U \_\_\_\_\_ W \_\_\_\_\_ C — b

heading as it will be at the very top of the I & F a/c anyway.

Display as follows



⑤ We are organising another wine tasting for the U — W — C — b on 1/3/199-. Please prepare, landscape, the following wine tasting grid notes.

Wine	Price per case excl. Vat	Appearance	Nose	Palate	Conclusion
1)					
2)					
3)					
4)					
5)					
6)					

This template can be used for all our wine tastings. Prepare it on a word processor and leave spaces for six wines on the first grid and spaces for five wines on the second grid. We can then key-in the names & prices of the wines to be tasted. I personally prefer only five wines but some of the others like six.

A4 paper: landscape : 25 copies - please!

---



⑥ Finally:

Prepare a multi-page booklet (10 copies)  
beginning with:

- Page 1 Cover: logo of G&G plc centred on  
an A4 page.
- Page 2: I & E a/c of U — W — C — b.  
(A4 size)
- Page 3: Bal. sheet of U — W — C — b.  
(A4 size)
- Page 4: A4 page of both I & E a/c and  
Bal. sheet together.
- Page 5: Sample of wine tasting grid  
notes (6 wines)
- Page 6: Sample of wine tasting grid  
notes (5 wines)
- Page 7: Blank A4 page.

Please bind 10 copies of the above 7-page  
doc. for our next U — W —  
C — b Committee meeting.

---

NOTE:

Remembers to get the junior staff  
to complete the ~~approp~~ appropriate  
documentation for the Reprography  
Department, i.e.,

'Record of Copies Taken'

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# □ Assignment Eleven:

## Pippa Fashions

**Unit 6: Processing correspondence**  
**Element 6.1: Identify and respond to correspondence for own action**

**Target Time: 2 hours**

### Main Skills

- 1 Correctly identifying and prioritising correspondence for own action
- 2 Promptly passing to correct recipients correspondence outside own area of responsibility
- 3 Promptly answering own correspondence according to its priority
- 4 Maintaining a proper balance between speed, mode and cost of response
- 5 Using the correct language and grammar in order to convey the correct tone
- 6 Checking for accuracy all correspondence prepared by self and others, including errors or omissions being identified and corrected as appropriate
- 7 Signing own correspondence, as appropriate, prior to distribution
- 8 Clearly annotating the postage class or service required for the correspondence
- 9 Keeping records up-to-date, legible and accurate at all times
- 10 Following and implementing safe working practices at all times
- 11 Following and implementing security and confidentiality procedures at all times

### Associated Skills

- 1 Prioritising tasks as appropriate
- 2 Using appropriate accurate keyboarding techniques
- 3 Preparing documents using the correct style of presentation
- 4 Composing and dealing expediently with routine correspondence
- 5 Using dictionaries and other reference sources, including on-line spelling verification in the case of word processor or computer usage
- 6 Using accurate proofreading and correction techniques as appropriate
- 7 Communicating with superiors and juniors by telephone and also face to face

### Resources

Word Processor or Typewriter  
 List of Correspondence Received  
 Dictionary or on-line spelling verification  
 Headed stationery – including memo, A4, A5 letter-headed, etc  
 Telephone training equipment  
 Interruption tasks – attached  
 Correction materials for manual or electric typewriters  
 Postage Out Book  
 Record of Correspondence to be posted  
 Record of Correspondence to be referred to a third party – attached

**PIPPA**  
*fashions*

42 Charles Square, Southampton  
Hants RG23 5TG

Tel: Southampton 981435

Fax: Southampton 965130

Telex: 718345 PIPFAS G

## Pippa Fashions – Scenario

You are now the Principal PA to Ms Pippa Carling, having recently been promoted. Business for Pippa Fashions – and particular for Pippa herself – has grown and expanded to the extent that she now has three PAs of which you are the Principal. Pippa is rather pleased with herself for recruiting you straight from college with a Level II Diploma in Business Administration and she has encouraged you to continue with your secretarial/business administration studies on a part-time basis at the local college, hopefully eventually leading to the award of a Business Administration Diploma at Level III.

However, in the daily running of Pippa Fashions, there is little time to speak of qualifications or training. Work is piling up on your desk despite your excellent organisational skills and in spite of the able assistance you are given by Susan and Stephen – your two assistants in Pippa’s private offices.



As usual, Pippa travels a great deal, throughout the length and breadth of the country in connection with her work and her hatred of driving has not diminished; she still requires you to organise most of her travel with British Rail, especially her trips to other branches and offices of the company. She has now opened an office in Edinburgh and things are looking very good in the Scottish market, so you can bet that there will be more travel to Scotland in the near future.

Today, Pippa has flown to Paris to see the new collections for autumn; you understand fully how far ahead the buying of fashion takes place. She has, however, popped into the office and left you instructions which you should follow and implement closely in connection with responding to some of her accumulating piles of correspondence. Pippa is notorious for not replying in time to correspondence and is frequently criticised for this; this is one of the reasons why she has appointed you as her Principal PA; she wants you to use your initiative to deal with correspondence in her absence. Good luck!

Hi! As you know, I'm off to Paris on the early flight this morning to view the autumn collections. No doubt they will be even more bizarre and wild than last year. I do imagine, however, that I will be able (with the help of my buyers) to procure some choice garments for our existing and, soon to be opened, outlets.

I read recently in a business magazine at Heathrow that the retail life-cycle is becoming shorter and that the retail analysts say it is not possible to prevent company decline - only to postpone it. Thank goodness we are still in a period called Accelerated Development!

It is not only accelerated development, it is also, I hope, exhilarating for all my staff to be actively involved in the fashion industry. It is a very volatile industry, but I think that's why I enjoy it so much.

→ over

At any rate, while I'm away from base I'd like you to deal with all my correspondence.

Some of it is routine mail which you can answer and sign yourself. Some of it needs to be composed as if I had written or dictated it. This you can pp for me.

Other items (only urgent ones mind) can be passed to a third-party (someone else in the company) to deal with in my absence.

Keep accurate records of all correspondence you write, sign, or allocate for action by a third party. Also keep copies of all correspondence for my perusal upon my return - on the Day File.

Complete the Postage Out Book daily, accurately and legibly. I know you have other, more important, duties and interruptions to deal with, but I especially want you (during my Paris trip) to look after my correspondence.

MF/→

I have been subject, recently, to a great deal of criticism for my apparent absentmindedness in dealing promptly with my correspondence. It is for this reason that I'd like you to pay particular attention to this aspect of my work during the next few days.

I know I can depend on you to execute your duties effectively and efficiently.

See you very soon.

Rip



Day One - Correspondence/Mail received:

- 1) a letter from Linderian & co., Postboys Parade, Southampton, SO9 2B SPX, asking us to attend a gala evening in the presence of Sir Harold Seconder on 30/04/199. at 7:30 pm.  
  
I wd. like to attend with 2 guests.  
Reply & pp this one for me.
- 2) a bill from S. Mathews plc, for wine for our last client evening in Birmingham.  
  
Pass to Carol Edgar in accounts. She is empowered to sign cheques on behalf of P \_\_\_\_\_ F \_\_\_\_\_.
- 3) a demand for payment of a telephone bill @ the Intercontinental in Frankfurt. The bill is for 730 DM. I made only 5/6 local calls for taxis on the visit concerned. write again, in English, asking for a note of the numbers called, otherwise we cannot settle this a/c.

- 4) a letter from Mr. Colin Skan of 29 Cogry Hill, Ballyclare, co. Antrim, N. Ireland, demanding to know why I haven't replied to his quotation for the installation of a new telephone system in our Edinburgh office. Write to him, on my behalf, in placatory and explanatory terms, informing him that we have, as yet, not decided whether or not to install a telephone system of the complexity he is suggesting. BUT, if we do, we will contact him immediately. He really must learn not to be so demanding: £32,000 is a lot of money and our Edinburgh operation is still not breaking even, although we expect it will by the end of this financial year.
- 5) a telephone call from Mrs. Lorna Callaghan in Fife demanding to know where Puppa may be contacted. Lorna is a buyer in Edinburgh but has not been included on the Paris trip. Deal carefully with this caller. Sparks could fly!
- 6) a telephone bill for £684 (inc. Vat) for the Liverpool office. Pass to Carol for payment.

AND

then memo Liverpool office with our standard budget warning data. This bill is way beyond budget!

- 7) a letter from Clareman gmbh, in Cologne, Germany, inviting us to a trade fair in Munich. Reply in the affirmative. I will travel solo on this trip.
- 8) telephone Travel (Pierre) & Book my tickets for Munich -- / -- /19 -- until -- / -- /19 --. Clareman are putting me up. Confirm the travel details to Pierre in a memo just to keep the records straight.
- 9) a letter from a local estate agent including details of office property to let in Southampton. Standard reply (from your own signature) - simply: Thank you; will be in touch if anything interesting upon my return!. Do expand as nec<sub>y</sub>
- 10) a piece of junk mail informing us of a win of a Royal Doulton figurine. Destroy at once: don't believe this rubbish.

## Day Two - correspondence/mail received:

- 1) an advertisement about a new supplier of female accessories to up market fashion companies. Reply to Cassandra Murray-Tate, 21 Victoria Way, London, W1, requesting a brochure, catalogue and price list.
- 2) a memo from Pierre about escalating travel costs. Acknowledge receipt and file.
- 3) a circular letter about a charity event at County Hall. Send a £25 donation with a personally-signed letter from me. 1st class for all enclosures of cheques as usual.
- 4) an enquiry from Peter Tollerton, Harmony Hill, Hillsborough, Co. Down, N. Ireland, BT46 8PA, regarding our Edinburgh opening. Send him a company brochure - 1st class - also compliment slip.
- 5) a quotation from F M St Legalle for the refurbishment programme for our

2nd store in Newcastle. They have not included 'Terms'. Write back requesting same a.s.a.p.

- 6) an invoice from Hayburn & Collins, Builders, 21 Cavendish Yard, Kentish Town, London, N16 2BN, for repairs to our Kings Road premises. Pass to Carol for payment, minus the usual 12% discount, as we are paying within 30 days. Tell Carol to hold until day 27 to ease our cash flow problems. She wd. probably do this anyway but it wd. do no harm to pass on my request/instruction.
- 7) a statement from Mortou, Turtle & Mortou, Estate Agents, for our annual account with them. Acknowledge on A5 paper & file copies.
- 8) a notice from the local electricity office about a break in supply next week. memo all offices - principals only - and advise them to post copy memo. on noticeboards in their six departments.
- 9) prepare a draft offer of a buyer's

position (salary range from menu in Personnel, and also job description/Job analysis) for our Edinburgh shop to Mrs. A.L. Knight of 11 South Head, Dunfermline, KY11 3UB. Mark this letter Confidential but do not place a copy on the day file. 1st Class post.

- 10) an order for our special offer milk stole from our regular mail order client:  
 Mr. R.S. Perret, 56 Longmore Road, Shirley, Southall, BA0 3DY: a present for his wife.  
 mark the account confidential and send to Mr. P. Pass the order to our mail order department.

Remember: Complete all record books - accurately; legibly; and regularly.

P.

## Interruption task

[To be handed out after 25 minutes].

A Yugoslav supplier has called without an appointment to pay a social visit to Pippa.

You, as principal PA, should organise tea or coffee for the visitor - a female - very grandly dressed.

Explain that Pippa is abroad (vaguely) and make conversation while sipping tea, etc. with the guest for no more than 10-12 minutes.

Remember: you have deadlines to meet!

---







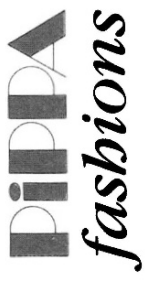
**memo**

**Date:**

**From:**

**To:**

**Subject:**



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# □ Assignment Twelve:

## County Cars

**Unit 7: Organising work schedules**  
**Element 7.1: Manage appointments**

---

**Target Time: 2½ hours**

### Main Skills

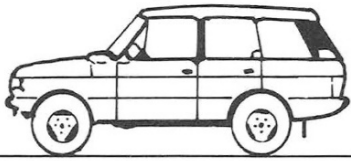
- |  |   |
|--|---|
| <ol style="list-style-type: none"> <li>1 Negotiating and agreeing appointments within given time constraints</li> <li>2 Confirming appointments as a matter of course at all times</li> <li>3 Entering all relevant information and essential information into the appropriate scheduling aids</li> <li>4 Entering action notes into all scheduling aids and monitoring progress</li> <li>5 Dealing promptly and effectively with all non-routine and emergency demands</li> <li>6 Ensuring that all scheduling entries are up-to-date, legible and accurate</li> <li>7 Following and implementing safe working practices at all times</li> <li>8 Following and implementing security and confidentiality procedures at all times</li> </ol> | <ol style="list-style-type: none"> <li>2 Planning and prioritising appointments within given time schedules</li> <li>3 Communicating both orally and in writing with superiors and juniors</li> <li>4 Operating and using computerised diaries and scheduling aids</li> <li>5 Negotiating with superiors and juniors</li> <li>6 Maintaining effective working relationships at all times</li> <li>7 Dealing with interruptions</li> </ol> |
|--|---|

### Resources

Typewriter or Word Processor or Computer Terminal  
 Diaries – pocket and desk types  
 Personal organisers and visual planners – manual or computerised  
 Filing system  
 Dictionary or on-line spelling verification  
 Stationery – letter-headed, memo, envelopes, etc  
 Access to Facsimile  
 Access to E-mail  
 Access to Telex  
 Telephone training equipment  
 Interruption task – attached

### Associated Skills

- 1 Prioritising tasks



# *CountyCars*

CAR  
DEALERSHIP

Longacre Road, Thames Ditton GF23 7JB  
Tel: 081 675 3456 Fax: 081 789 3456  
Telex: 768401 COCARS G

## County Cars – Scenario

You are employed as the Personal Secretary/Personal Assistant to the two principals in County Cars – Tony Hopkinson – the owner; and Ian Simpson – the General Manager. Both are very busy businessmen and they are both, unfortunately, well-known for being weak at managing appointments. Tony, particularly, who travels a great deal in connection with his work, is unreliable, not turning up at meetings and other important engagements.

In your previous position within the company, you worked as a travel clerk, and during that time, you learned just how totally chaotic Tony actually is. You organised all his personal travel and also the travel of his wife and son who sometimes accompanied him on his various journeys. On one occasion his son turned up at Heathrow with his mother to meet Tony who was supposed to be travelling from Birmingham to Heathrow to fly on for a short holiday to Europe but Tony did not appear. He decided to stay on in Birmingham for another day neglecting totally to inform you or his wife or son. Needless to say, angry words were exchanged and you, personally, felt you were to blame, even though you could not account for the fact that your boss chose not to follow the plans and travel arrangements which you had, so carefully and painstakingly, made on his behalf. At any rate, Mrs H. and her son travelled on to Amsterdam minus Tony, who followed the next day! This is the sort of situation which you wish to avoid at all costs since a repetition of this would probably lead to a *Hopkinson v Hopkinson* case in the matrimonial courts!



Your work is even more difficult in that you also have to organise the maintenance of the diary and social calendar of Ian. He is a very easy-going and calm man but he, too, can be careless about his appointments. Therefore, you know only too well that you have a very difficult job ahead of you. You constantly have to revise the plans and reschedule appointments and physically to take the personal organisers belonging to Tony and Ian from them and write – for them – their appointments, using different coloured pens, highlighters, etc, and even then sometimes things still go wrong. Good luck with your tasks! You'll need it!

01/--/9-

By now you will be well and truly accustomed to our unique methods of working here at County Cars.

One of the irritating facts about the new recruits who come to us direct from college courses is the fact that, at colleges, students seem to be trained in such a way that they believe everything will be perfectly easy to organise, manage and control in the real world.

It's not as mathematical as you no doubt have found out. We are not running an equation at County Cars; we are running a business and the bottom line is

Customers = Sales = Profits

(most of the time, though not always).

I have had lengthy discussions with Ian Simpson about our appointment procedures

and he and I are both agreed on the fact that we must make a concerted effort to be more effective and organised about our meetings, appointments, sales conferences, travel, luncheons, dinner parties, etc.

We sell prestige cars here at County Cars and we must offer and maintain a quality service. Anita Roddick of The Body Shop has said that, in Europe, in the 1990s, service will give retailers the needed competitive edge or advantage. For this reason, we must set up all meetings carefully, using:

- a) office diary;
- b) staff location/availability board;
- c) pocket diaries;
- d) personal organisers; and
- e) daily schedules (typed or wordprocessed) for TH and IS.

This means more, or additional, work for

you, but I am sure that you will agree, in the long term, this will pay dividends.

We have just carried out our end-of-year, trading year, audit and, in keeping with national statistics, our new car/used vehicles sales are well down on last year.

We are determined, despite pending recession worldwide, to raise our profile and to offer prestige vehicles along with a quality service. We are relying on you to augment and support us fully in our endeavour.

By the way - yes, you may have next Friday off to attend your cousin's wedding in Coventry. Have a super time, but please make sure that our appointment schedules are flawless!

Thanks,

Tony H.

---



Schedule to be arranged for TH

Monday 10.00 am: meeting at Thames Ditton offices/showroom with Anne Curtlett to discuss marketing policy.

?? 10.15 am: meeting with Ian Simpson  
(weekly meetings re: sales targets)

Perhaps you could memo Ian officially/formally to advise him that this will be the official slot for our weekly sales meeting for setting targets and reviewing sales for the previous week, instead of Friday afternoons.

Maybe, on second thoughts, you should set it for 11 am since Anne Curtlett may need more than 15 minutes. What do you think?

Monday afternoon - time and venue to be arranged -

: meeting with Gary Clarke of Clarke, Clarke + Clarke, Leeds, re: supply of fleet cars (mid-price range). It's unlikely that

I will be able to travel up to Leeds for this meeting. Perhaps you would kindly telephone Gary (or his PA, if he has one) to set up a meeting here for late/mid-afternoon. Confirm this telephone arrangement in writing and place a copy on the Day file as well as in my personal folic/reminder file - for my own records.

Tuesday: 11.15 am - Dental appointment in TD<sup>n</sup> with Graham Arnold BDS.

Tel. to see if we could have this appt. changed to after lunch. If I have it at 11.15, I won't be able to eat lunch properly (if at all). This we want to avoid.

Also, follow up this appointment with a letter, as last time I changed (personally mind) an appointment and was charged a cancellation/non-attendance fee. We had a terrible row. Try to avoid a repeat performance.

I actually hate dental appointments, and any additional upset only adds to my already difficult-to-conceal anxiety.

Tuesday: 3.00 pm - I'm freeing my diary this afternoon to take Mrs H. to Harrods (Harvey Nics) to buy two wedding presents.

Arrange a driver for the afternoon and evening. We will probably stay in town for dinner and possibly a theatre visit, if we feel up to it!

Wednesday: 9.30 am - meeting with the company solicitor to discuss the lease on our premises.

This could be lengthy, so - no appt's until very late afternoon pls.

Thursday: 4.30 pm → late evening. I (with Mrs H.) am hoping to attend a preview of the new exhibition at the Hart Gallery and then a private dinner party at Imelda's place in Brompton Road.

Friday: am: Cancel the usual Sales targets/review meeting with Ian - now changed to Mondays. Don't forget to memo him and to remind him again on Mondays, for a few weeks anyway.

I have, stupidly, double-booked myself for lunch on Friday with Tom Hastle and also with the rep. from County Cars North. Cancel Tom's appointment by telephone and also confirm cancellation in writing. Apologise - something very important and unforeseen has cropped up, eg, legal, financial, - you decide. I will re-schedule with Tom and inform you of the details next week.

Tim Tidy, the editor of the local n/paper wants to have a meeting with me re: advertising. Refuse this tactfully. We use them when it suits us, and not the other way round as Tim appears to think. Tell him that I'm way

too busy to meet. Diary full for next 3 months.  
I'll contact him!?

Note: all foregoing appointments on  
staff/location/availability system.

- : also in desk diary (master copy - not to be removed from its position on your desk at any time)!
- : also in my pocket diary - check this carefully for any duplications.
- : you'll find the p./organiser on my desk - also complete it; and -
- : finally, type/word process a daily list of appointments on a postcard for me for each day.

**Remember**: Despite the fact that I like people to be able to find me in emergencies - see to it that my whereabouts are kept quiet since I do not like all staff to know my social

Whereabouts or my dealings with  
solicitors, accountants, etc.

\* Please ensure complete accuracy  
and follow and implement  
security and confidentiality  
procedures

AT ALL TIMES!

\*

Schedule to be arranged for I.S.

1) Man-ohed inclusive - on leave. There are no meetings in my diary apart from one (Tuesday: 2pm) with our three Scout reps. Tel. each on their mobile phones as follows:

Mike 0860 872435

Phil 0860 876410

Pete 0860 871467

Confirm cancellation of this meeting which was to have been held in TD<sup>n</sup> in writing to each rep.

2) Anyone requesting meetings or appointments should be advised that I am out of the country. Tony constantly changes our sales target/review meetings. Make sure he doesn't schedule one for any of my three leave days! \*

- 3) Reschedule the 2pm Tuesday meeting for 10am on Friday at TD<sub>2</sub> Offices - Con Room Four.
- 4) On Thursday 1am meeting live visitors from Barbara in Manchester at one pm for a luncheon appointment.

Please book lunch at a top-grade hotel in M/chester for six people - a licensed restaurant pls - although our German friends do not usually consume ~~to~~ much alcohol at lunchtime.

For one pm - a good table! ←  
 ↗ Very important

Confirm in writing to hotel and fax

The Barbara Branch on \_\_\_\_\_ 861119

Confirming:

(a) venue;

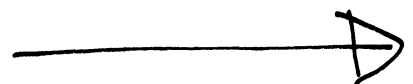
(b) Time; and

(c) programme - as follows:-

12.45 pm : Sherry reception

1.00 pm : luncheon

2.30 pm : meeting in seminar room (to be booked by you)





4.00 pm : afternoon tea

5.00 pm : visit to County Cars North

5) Friday 2pm - I have another double-

booking. Cancel the Steve Mattersly  
appt at Mattersly plc, Holbam.

Apologise and advise him that I will  
need to make an alternative arrangement  
a.s.a.p.

I will keep my other 2pm appointment  
here at TD<sup>2</sup> with Simon Russell of  
County Cars West.

Please:

- : log all appts. in desk diary;
- : log all appts. on staff location/  
availability recording mechanism;
- : prepare daily list of appts;
- : enter in my pocket diary; and
- : also in my personal organiser.

Confirm all appts. and/or cancellations in writing a.s.a.p.

---

Interruption task

[To be handed out after 30 minutes]

URGENT

6pm Thursday

Sorry for this emergency meeting. I need to see Ian Simpson and Richard Bewlay of Sales tomorrow Friday @ 2pm.

If this involves any cancellations in their diaries/schedules - IMPLEMENT!

This meeting is TOP PRIORITY!

Tang H.

# August 1991

**26 Monday**

(238-127)

Late Summer Holiday (UK except Scotland)

WEEK 35

**Thursday 29**

(241-124)

**27 Tuesday**

(239-126)

WEEK 35

**Friday 30**

(242-123)

**28 Wednesday**

(240-125)

WEEK 35

**Saturday 31**

(243-122)

**Sunday 1**

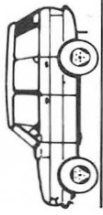
(244-121)

**August**

**M T W T F S S M T W T F S S M T W T F S S M**  
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

**September**

**M T W T F S S M T W T F S S M T W T F S S M**  
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30



# County Cars

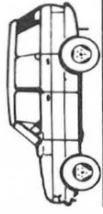
## M E M O

Date:

From:

To:

Subject:



# County Cars

## M E M O

Date:

From:

To:

Subject:

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# □ Assignment Thirteen:

## Alessandra Trading Company

**Unit 7: Organising work schedules**  
**Element 7.2: Organise own work schedule**

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**Target Time: 2½ hours**

### Main Skills

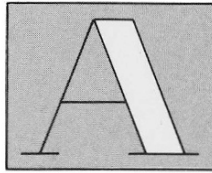
- 1 Identifying regular and *ad hoc* tasks and prioritising same
- 2 Completing identified tasks in order of priority with the appropriate time and effort allocation
- 3 Catering for unexpected events within a flexible plan
- 4 Recognising changes in priorities and adapting work schedules accordingly
- 5 Identifying, obtaining and co-ordinating relevant assistance in order to meet specific demands and deadlines set
- 6 Delegating tasks to others with accurate definitions and monitoring progress
- 7 Adapting and developing an effective professional performance through the use of planning and scheduling aids
- 8 Following and implementing safe working practices at all times
- 9 Following and implementing security and confidentiality procedures at all times

### Associated Skills

- 1 Scheduling work within realistic deadlines
- 2 Using influence and negotiating skills
- 3 Monitoring office procedures and processes effectively
- 4 Allocating resources economically
- 5 Communicating and co-ordinating work schedules with superiors and juniors
- 6 Prioritising tasks
- 7 Dealing effectively and efficiently with interruptions in a suitable, tactful and diplomatic manner

### Resources

Typewriter or Word Processor or Computer Terminal  
 Dictionary or on-line spelling verification  
 Stationery – letter-headed, memo paper, envelopes, etc  
 Computerised and manual planning and scheduling aids  
 Diaries – desk, pocket and personal organisers  
 Correction materials  
 Highlighters and other suitable materials  
 Telephone training equipment  
 Interruption task – attached



# ALESSANDRA TRADING COMPANY

181 High Holborn, London WC2N 5JP Tel: 081 462 3579  
Fax: 081 462 3774 Telex: 874521 ALTOCO G

## Alessandra Trading Company – Scenario

After a stormy introductory period of work in Alessandra Trading, you have been promoted to become the Principal Personal Assistant of Ms Alessandra Carlatto – the renowned Spanish entrepreneur with the scissor-sharp tongue and the wit and charm to match a very fiery character. Initially you were terrified of her, principally because of the volatile nature of her relationship with her then partner Simone Lynne who was really a very ineffective member of the company. Simone simply wanted ALL of the privileges and NONE of the responsibilities, of which there are many, of running the Alessandra Trading Company. Therefore – she simply had to go. Alessandra bought her out after a very turbulent meeting with Simone and her legal advisers. Nevertheless, since Simone's departure, Alessandra has never looked back, mainly because it is against her Spanish nature and secondly because she is, essentially, a very good and shrewd businesswoman.



These days Alessandra travels extensively and leaves you to organise your own work schedule independently of her instructions. This is a rather grand compliment since Alessandra can be very didactic and prescriptive about how her staff spend their time. You have earned, and not before time, the respect and admiration of Ms Carlatto since you have managed to pull her out of several potentially very difficult and embarrassing situations.

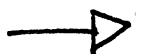
The easy part of your work is planning Alessandra's schedules since she is reasonably honest with you and gives you fair warning of her commitments and business intentions. She does, however, have a rather tempestuous relationship (if it could be called that) with a German businessman – with only a Christian name as far as one is able to gather, ie, Hans. You are often caught in the middle of her disagreements and have to shelter her from this man. You arrive at your desk today to find the following list of instructions from Ms Carlatto. Follow and implement secure and confidential working procedures at all times and execute her instructions using your initiative as necessary as efficiently and as effectively as possible. Good luck and enjoy your work!

Today I'm at the Austrian Embassy for the lunch of the year. Please keep my whereabouts quiet. Hopefully my favourite person will also be there; if not, I may not come into the office tomorrow.

I'm only joking. I'll be back at my desk tomorrow a.m. from 8 o'clock, but do not let others find out this information. I like to, personally, "welcome" latecomers!

Bus and tube travel must be really dreadful these days. Between you and me, if I catch Sandra coming in late again, she's not going - she's gone! Keep a note of her arrival time this morning. Sorry to be so sarcastic, but it's 2.00 a.m. and I'm still up working. I get so cross sometimes, especially having to patch up all the incomplete business which has been left by our old friend, Simone!

Anyway, as usual, I know you will be ultra-busy





so I don't need to leave you too many tasks to complete. By the time you finish all the work I left you yesterday, you will be absolutely exhausted. Why don't you take the afternoon off to visit your sister again!?

You should be finished - at your rate of working - by lunchtime. Consider it anyway.

You deserve some free time. It's unofficial, so don't write it on your leave card. Consider it a gift from Auntie Alesi!

Anyway: attached is a list of the things I'd like you to do today.

- Reminders to:
- : prioritize;
  - : place copies of all correspondence on the day file;
  - : keep my business information very secure and confidential - I'm especially paranoid since S.L. left the company; and
  - : proofread carefully, all your work.

---

Love,  
Alesi C.

1) Type, or u.p. preferably, a letter to  
Stephenson & Wilson, Investment and Financial  
Consultants, 39 Wellington Street, Ballymena,  
BT42 1JH, asking for their consultancy  
rates

Ascertain from them, to what extent they  
travel to mainland UK.

cc to Boris in Finance.

2) Tel. my dentist. See desk diary for number.  
Cancel my Friday appointment, yet again.

It's only for a check-up and I simply haven't  
got time - not since S.L. left me in this  
muddle!

3) If Hans calls, tell him nothing.

In fact tell him to get lost; no, don't.

Find out as much as you possibly  
can about what he's up to. I want  
some data on this guy!

4) Book a conference room for me at Grosvenor House for a function on the 24th of next month for 20 people - for lunch. Ask, by telephone, for a selection of menus and follow this up in writing as soon as possible. I suggest you write directly to Jan — ? (can't remember his surname), the Food & Beverage Manager.

5) Price similar accommodation at the Hyde Park Hotel, opposite Harvey Nics!

Room for lunch

20 people

Selection of menus

Microphone

OHP

Flipchart &

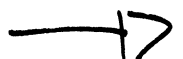
Usual conference facilities.

6) Reminds the work you are preparing for next Friday. Could you finish it as a matter of some urgency. (Don't

→

want to commit the name of the project to paper). Pls complete urgently!

- 7) Deal with all my personal telephone calls and answer, using your initiative, any telexes Trevor Owens may bring to you for your attention - in my absence.
- 8) A call may come in from Rome about the Trading Company (Europe) annual convention. See if you can find Dermot Gallen and ask him if he plans to attend. I will sign for his travel and accommodation, plus 100 Swiss francs subsistence (maximum) per day. Remember his last trip to Mayrhofer: 500 schillings per day subsistence request! Tut!
- 9) Perhaps, if the telephone is very busy, as it is inclined to be in the morning session, you could ask one of the juniors - or TELL them - (use your own judgement) to deal with the calls while you get on with more important work!



⑩ Finally, do you remember I asked you for 200 copies of the programme for the luncheon launch of our new range of cosmetics at the Carlton! They 'phoned me at home last night to inform me that they cannot deliver on time. Perhaps you could source an alternative printer.

NB: copies of everything on my desk. I may come in later tonight, if I'm free!

See you soon,

Alexi, C<sup>o</sup>

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**Interruption Task**

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(To be handed out after 45 minutes)

A telephone call comes in from Hans who has arrived at Heathrow after a rather difficult and, as far as you can gather, lengthy (inexplicably) journey from Miami. This should normally be around 8–9 hours but he seems to believe that he has been travelling for over 24 hours. He wishes to speak to Alessandra, but she has left express instructions that he is not to know her whereabouts.

Perhaps you should advise him to fetch a taxi and to travel to an hotel – the Basil Street, behind Harrods – where he usually stays during intermittances in the relationship, and then you can advise Alesi of his whereabouts by telephone in order that she does not inadvertently bump into him – or vice versa – leave it up to her!

Deal sensitively with this call. Despite the fact that there are problems, you must remain professional at all times!!



**MEMORANDUM**

Date:  
From:  
Subject:

To:



**MEMORANDUM**

Date:  
From:  
Subject:

To:

---

# □ Assignment Fourteen:

## Grahams, Peters & Clarke plc

**Unit 8: Servicing meetings**  
**Element 8.1: Organise and prepare for meetings**

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**Target Time: 1½ hours**

### Main Skills

- 1 Carrying out all planning and booking procedures correctly and confirming these arrangements
- 2 Agreeing agenda items with Jeremy Rosen, the principal, or other chair of meetings convened
- 3 Checking for relevance, and accuracy, all meeting and other papers; identifying and correcting any possible errors or slips
- 4 In advance of the meeting, despatching all relevant papers, as directed, to participants
- 5 Fully briefing, prior to the meeting, Jeremy Rosen, the principal, or any other chair of the meeting convened
- 6 Fully preparing meeting room(s) in advance of the meeting(s)
- 7 Identifying audio-visual requirements and any other necessary equipment and ensuring that same is provided in excellent working order
- 8 Ordering suitable refreshments as directed
- 9 Following and implementing safe working practices at all times
- 10 Following and implementing security and confidentiality procedures at all times

### Associated Skills

- 1 Communications skills – oral and written
- 2 Using suitable correction techniques and carrying out thorough proofreading
- 3 Setting up meeting rooms and also setting up and checking, for faults, appropriate, relevant audio-visual aids
- 4 Prioritising tasks as necessary to fit into the given schedule within specified time constraints

### Resources

Typewriter or Word Processor or Computer Terminal  
 Photocopier or Duplicator  
 Stationery – plain and headed paper, including memo paper  
 Flip chart(s)  
 Overhead projector(s)  
 Suitable pens for use in conjunction with flip charts and ohps  
 Glasses and water jugs  
 Blotters  
 Pens and stationery for meeting rooms  
 Manuscripts – attached  
 Meetings Room Booking Form – attached  
 Access to Fax or Access to Telex  
 Meetings Template – manuscript attached





GRAHAMS  
PETERS &  
CLARKE PLC

Personnel Office

67 Saville Street, London W1 Tel: 081 786 5689  
Fax: 081 786 3450 Telex: 901356 GRPECL G

## Grahams, Peters & Clarke plc – Scenario

You have been given an increase in salary at Grahams, Peters & Clarke plc after your initial three-month trial period since they are exceptionally well pleased with both the standard of your work and with your commitment and loyalty to the job and to the company. This is reassuring as you had always doubted the words of the wise that commitment and earnest, loyal good workmanship would pay dividends in the long term. Well, you have not had to wait too long for your rewards – many have to wait much longer than three months! However, to be quite honest, few are as worthy of promotion and pay increases as you are.

You have, in the past three months, foregone social arrangements and plans in order to see the company through particularly busy patches. GP&C plc is a large, and growing, international company with representatives, or brokers, so-called, in most continents of the world. The two principal offices, however, are in London (where you are at present based) and Paris.

Mail and contact with the Paris office is ongoing, like a never-ending stream! However, after another three months, you have been promised a four-week secondment to the Paris office to see how they carry out their procedures at that end of the business. This, you are really looking forward to, but in the meantime there is a lot of work to do.



Recently, a great deal of your time has been taken up in the secretarial function of servicing meetings. This has been particularly interesting as it has given you a much more accurate picture of what GP&C plc is all about. You now know the full organisational hierarchy inside out and you have been able to meet many of the Paris personnel through this function.

Today, Jeremy has gone to Paris on recruitment business, and you have been left a list of duties in his inimitable hand! Please read carefully the attached list of instructions about the Meetings Schedule for the following week and organise all the various events to the best of your ability. Good luck and enjoy your tasks! (PS. Enjoy your Paris trip in the not-too-distant future!)

As I mentioned to you on Friday I will be in Paris when you are reading this note. I am actually travelling on Sunday in order to visit my cousin Clarissa in the city before the Monday recruitment meeting. As you are no doubt aware, the Paris meeting may last well into the evening. This may mean my absence on Tuesday until the afternoon, especially if I have to stay overnight as a result of a lengthy Monday meeting.

Nevertheless, I'd like you to look after the day-to-day running of my department (Personnel). Remember to take a full and complete note of any callers or complaints registered. Last time I was away from the office, your assistant, Peter, neglected to take a note of callers with the result that those who visited had to repeat (to their chagrin) their complaints,

etc. This only leads to more anger on their part. Ask them to leave a short memo giving full details of their survey, complaint, etc.

Also, water my hyacinth plants in the meeting room. These look particularly well and are a pleasant distraction during the more ~~tedious~~ <sup>tedious</sup> moments of the never-ending stream of meetings which seem to be the "engine" of GPSC at the present moment.

If you have any major problems or difficulties, do not hesitate to contact Rosemarie Squirrel on EXT. 393. She used to be <sup>on</sup> 392; please alter the telephone list on your word processor and print 10 copies of same.

Please arrange accommodation, services, equipment, etc. for the attached list of meetings. I must get the John Cleese video "Meethys Bloody Meethys" for our o/p

senior staff; this list is getting well beyond a joke!

Finally, you can call me (if in "dire straits") at the Paris office, extension 1171.

Remember: to keep accurate, legible and up-to-date records and complete the Mechi's Room Book Form for all meetings organised -

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Regards .

Jeremy .

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List of meetings:  
 ~~~~~

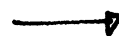
- 1) Book Conference Room 6 for an informal meeting of the ad hoc committee for catering arrangements for Monday --/--/9-- at 4 pm until 6 pm.

Organise tea and biscuits for 6 people for 5 pm.

- 2) Book Conference Room 2 for a meeting of the appointments panel for Tuesday @ 11.00 am. The full panel (10 staff) will meet on this occasion.

Arrange the seating for 10 members of the panel plus a chair at a suitable distance for candidates to be interviewed for the position of Medical Officer for GP&C plc, London-based.

Tea to be served (panel only) at 10.45 am, prior to commencement of interviewing as, this time, we plan to stay close to, or to adhere to, our schedule. There are five



interviewees and each interview should last approximately 20 minutes plus 10 minutes between for discussion. Book time accordingly, making (obviously) allowances for any "over-runs". This post has had to be re-advertised. Hopefully we will appoint someone this time.

- 3) On Tuesday from 10 am until 4 pm we require Con. Rm 3 for a conference of 20 delegates. Monsieur Roget, from our Paris operation, will be delivering a presentation to the delegates and there will, in addition, be 3 members of senior management present.

Set up CR3 for this event, including a VCR with remote control, and clear instructions (typewritten) for its use, along with a screen and an overhead projector.

Also prepare a delegate pack (x 25) - always have surplus - of:

- : Company logo front page
- : Page 2: details of presentation (attached) - see notes
- : Page 3: Full contact details of London & Paris offices, incl. tel. telex, fax, etc.
- : Page 4: blank (gd. quality) paper/page.

- 4) Wednesday 2.15pm: Conference Room 5.  
Meeting of <sup>International</sup> Personnel Planning Committee  
[16 staff - incl. 2 from Paris].

Miss Squirrel and I will co-host/chair  
this very important meeting. Plan to be  
available to take the minutes.

Bottles, stationery & designer water only.  
light refreshments (tea & cucumber sandwiches)  
at 3.15pm.

This meeting could last well beyond the  
2 hours allocated in our diaries.

- 5) Wednesday 6pm: an informal meeting of  
the Entertainment Committee in Con. Room 11  
(the small room). Organise 3 bottles  
of a light (low alcohol) white wine and  
orange juice for this usually lively and  
(believe it or not) enjoyable meeting.

slightly  
chilled

Sorry  
no sparkling  
wines  
pls!  
They give  
Phyllis the  
grapes!

- 6) Tel. Helene in Paris and organise a  
room for a meeting on the 22nd of  
this month for 13 people. Meeting: Personnel  
London/Paris Liaison Committee. Confirm by  
Fax or Telex. Copy Miss Squirrel and day  
file please.

→||



7) Friday: a top-of-the-range meeting.  
 Four senior staff, including P S Fox  
 from the Basildon Field Office. He is a  
 vegan, so pls. arrange a suitable alternative  
 menu for him at our usual haunt  
 'Chez Gourmand' in Middle News, WI.  
 Meeting Room for 4 plus a secretary:  
 probably you again: to take the  
 minutes.

Time : commencing 11am.  
 lunch 1 pm (make bookings)  
 pm session 3 pm → ? (6 pm?)  
 ↙  
 pm tea - about 3.30 pm and coffee  
 Mr D L R Elub always has a bit  
 too much 'red' at lunch.

8) During this meeting, please be available  
 (if you are not taking minutes) to assist  
 Mr D L R Elub, who usually demands  
 a violet o.h.p. pen of a strange brand  
 name or similar. Be prepared for

→||

every possible contingency. Also for the meeting on Wednesday at 2:15pm in CR5: arrange for suitable soft voice heating and open a few windows as ⑤ of the panel insist on (despite our express disapproval) smoking cigars, cigarettes and pipes. Ash-trays are unfortunately required for this particular meeting. We must vote on a "no smoking motion" at this meeting. I, personally, find the smoke intolerable.

NB: request all refreshments initially by telephone and then memo "Catering"; copy to Day File pls.

Also: Please type or word process the attached Presentation notes for M. Roget's big day on Tuesday!

Finally, please copy six pages of the Meetings Room Booking Form before completing the attached copy. The attached sheet is actually the 'master' copy.

Thanks,  
Jeremy.

A4 plain paper  
pls.

Grahams, Peters & Clarke plc

London & Paris

[ Offices & Representatives worldwide ]

Presentation by Monsieur Paul Roget  
@ G P S C plc, 67 Saville Street,  
London, W1 on \_\_\_\_\_, --/--/9--.

- |          |                                                                                                 |
|----------|-------------------------------------------------------------------------------------------------|
| 10.00 am | Registration and coffee.                                                                        |
| 10.15 am | Introduction of M. Roget by Miss R M Squirell.                                                  |
| 10.30 am | M. Roget: Presentation of new product range: the marketing concept and strategy of G P S C plc. |
| 12 noon  | Lunch                                                                                           |
| 2.00 pm  | Video presentation, courtesy of G P S C plc, Singapore.                                         |
| 2.45 pm  | M. Roget: The concept and system.                                                               |
| 3.30 pm  | Plenary session.                                                                                |
| 4.00 pm  | Vote of Thanks and <u>CLOSE</u> .                                                               |

Prepare this template on your word processor, if possible and make 25 copies please.

\_\_\_\_\_ Meeting, held on \_\_\_\_\_  
 at G \_\_\_\_\_ P \_\_\_\_\_ S C \_\_\_\_\_ plc \_\_\_\_\_ in  
 C \_\_\_\_\_ R \_\_\_\_\_ m \_\_\_\_\_.

NB: Copy: back-to-back; we are an environmentally-friendly company!

| Agenda Item | Notes . |
|-------------|---------|
| 1           |         |
| 2           |         |
| 3           |         |
| 4           |         |
| 5           |         |

Use ② A4 plain sheets and leave space for 10 agenda items and a final space for a.o.b. at the bottom.

\_\_\_\_\_  
 Tn. JR.





**GRAHAMS  
PETERS &  
CLARKE PLC**  
Personnel Office  
**MEMORANDUM**

**From:** \_\_\_\_\_  
**To:** \_\_\_\_\_  
**Subject:** \_\_\_\_\_  
**Date:** \_\_\_\_\_



**GRAHAMS  
PETERS &  
CLARKE PLC**  
Personnel Office  
**MEMORANDUM**

**From:** \_\_\_\_\_  
**To:** \_\_\_\_\_  
**Subject:** \_\_\_\_\_  
**Date:** \_\_\_\_\_

# □ Assignment Fifteen:

## Burnalls Fashions plc

**Unit 8: Servicing meetings**  
**Element 8.2: Administer and take notes of meetings**

**Target Time: 2½ hours**

### Main Skills

- 1 Checking all previously planned and booked arrangements before the meeting
- 2 Taking remedial action to meet changes or unforeseen requirements as necessary
- 3 Providing, at the meeting, additional or spare papers as directed by the principal
- 4 Accurately recording the identity and designation of attenders and non-attenders at meetings
- 5 Taking notes which will enable a sufficient and accurate record of the meeting
- 6 Transcribing a formal record which reflects the outcomes of the meeting
- 7 Checking the formal record for accuracy and having same approved by the principal, or other chair of the meeting
- 8 Despatching copies of the formal record of the meeting to participants within the prescribed/required timescales
- 9 Delegating tasks to others in an accurate manner and monitoring their progress
- 10 Following and implementing safe working practices at all times

- 11 Following and implementing security and confidentiality procedures at all times

### Associated Skills

- 1 Communication skills – oral and written
- 2 Problem-solving, particularly in the event of contingency arrangements
- 3 Identifying key points for the official minutes record
- 4 Operating, correctly, audio-visual aids
- 5 Prioritising the work schedule to meet deadlines and working within realistic time constraints

### Resources

Typewriter or Word Processor or Computer Terminal  
 Dictionary or on-line spelling verification  
 Stationery – pens, paper, etc for self and also for those attending meetings  
 Blotters  
 Glasses and water jugs  
 Ashtrays and NO SMOKING signs as appropriate  
 Minutes Record Book  
 Photocopier  
 Interruption Task – after 30 minutes – attached



Burnham Mews, Kingston-upon-Thames  
Surrey TW13 4BX

Tel: 071 249 1691 Fax: 071 249 6911

Telex: 127893 BURFAS G



## Burnalls Fashions plc – Scenario

You have recently been promoted from your position as a clerk in the Accounts Office of Burnalls Fashions plc in Kingston-upon-Thames to the position of Personal Secretary to James Stinson – one of the senior partners in this prestigious fashion company which specialises in clothing/high fashion for the Yuppie generation of baby boomers – that segment of the market with loads of disposable income.

Business has been very good at Burnalls despite a downturn in consumer spending generally; others on the high street have been complaining about the poor sales figures for this time of the year but Burnalls are still 'in there' and aiming to increase their already growing and enormous share of the market.



Recently there has been a period at Burnalls where nothing much seems to have happened in the administration section except for the organisation and cancellation and postponement of a series of very high-powered meetings. It appears, if the office grapevine is to be believed, that Burnalls is planning to buy over another major department store in the town and to extend their range of clothes to include the even more up-market German and Japanese designer garments which are so much in vogue with the market segment currently being targeted.

It is your job to be present at all meetings as requested by James Stinson in order to see that everything runs smoothly and also to take the minutes of the meetings before having them approved by JS. Eventually, you send these records/reports, etc out to those who attended and also to those who did not.

Read carefully the attached note from James and carry out all tasks required to the very best of your ability. Good luck and enjoy your tasks!

Memorandum

Business is really moving very fast these days and the pressure is on. If it's not one thing it's another. I am getting really tired of all these meetings.

Fritz Burnall has been in the office again this morning on his way over to Heathrow from where he will take a flight on to Japan.

Apparently he has almost sewn up the Japanese deal for the black designer gear so much in vogue at present for our baby boomer customers. I can't say that I personally like all that black gear; looks a bit like mourning clothes instead of upmarket, expensive clothing. Anyway, I don't have to wear it!

Fritz is off to Japan while Mel (his son) is still on business in Germany. He is due back tomorrow afternoon, so no doubt we will soon be in full swing with another extensive series of meetings. Already Fritz has lined

→

up several for the middle part of next week.

- Please:
- (a) arrange to attend each meeting.
  - (b) take minutes at each meeting.
  - (c) check bookings for meeting rooms.
  - (d) prepare all papers as required.
  - (e) produce (for my approval) minutes.
  - (f) send out minutes of meetings after approval.

Before each meeting you should also ensure that you have spare copies of agendas, minutes, other papers, etc. as some members are forgetful and come without the copies which you will, so carefully, <sup>have</sup> sent to them.

Also be prepared for any unforeseen problems and make contingency arrangements as far as it is possible to do so.

Please remember to record only essential key points for the record.

Thanks for your co-operation. You know that I rely greatly on your support and assistance!

James Stinson.

Meeting One

An informal meeting of 2 members of management with 2 union members to discuss the new pay deal.

Present: Fritz and Mel B\_\_\_\_\_ell. (BF plc)  
 Peter Waugh (Union)  
 May Winchler (Union)

The only positive outcome of this meeting is the decision to make a new, increased, offer to sales assistants and stores personnel at the beginning of next month.

This meeting was held on --/--/9- at 2pm  
 in the Board Room - ~~\_\_\_\_\_~~

Meeting Two

A formal meeting of the Buying/Procurement Department of Burnallo Fashions plc.

Present: F B  
 MB

Paul Williams - menswear dept.  
 Sally Koolie - ladies dept.  
 Anita Burnall - personnel.

Held in Room 3  
 at 1pm on --/--/9-.

m/f

Absent (with apologies) :

Ian Minglewood : Japanese buyer.  
 Mavis Dunseath : German buyer.

Absent (no apology):

Stephen Matthews (Finance)

- a) No matters arising from previous minutes.
- b) Fritz to spend 3 days in Japan from --/--/9--.
- c) Mel to spend 8 days in Germany from --/--/9--.
- d) Financial status: 22% up in sales for the month.
- e) Report to have been presented by SM to be tabled for the next meeting.
- f) a.o.b. IM and MD feel that the prices which will have to be charged for the  $\text{\textcircled{D}}$  and  $\text{\textcircled{G}}$  products being procured for next season.
- g) date of next meeting: to be notified with the minutes.

Pls. prepare the minutes for these two meetings in the proper format and pass to me for approval.

J.S.

Meeting Three:

A meeting held in our London office at 181 High Holborn on --/--/9- at 4pm.

Present: FB; MB; PW; SK; AB; IM; MD; SM;

} For details, ie,  
full names and  
job titles  
see minutes  
of previous meetings

Arnold Martin : Legal Department  
Martyn McWade : Warehousing Control.

- a) no matters arising from previous minutes
- b) FB gave a full and extensive report on his first venture to see the Japanese suppliers.

Key points:

- : all black clothes very much in vogue
- : different "silhouettes" for the new season.
- : fabrics: silk, linen and 100% pure cotton.
- : no acrylic or man-made fibres to be used.

- c) PB gave a full and extensive report of his sixth visit with MD — to the German supplier of the "Fashion Forward" supplies for the top-of-the-range design room.

Key points:

- : competitively priced
- : good quality garments
- : fabrics; mainly natural fibres.
- : colours: muted or black.
- : big demand in other major European countries.

- d) SM gave his Financial Report and the news was encouraging, as follows:

Key points:

- : sales up on the year by 18.5%
- : downturn in sales experienced by other K-U-Thames traders, not evident in our financial records.
- : predicted a small reversal of this trend as we are between seasons but will return to the escalating sales within 6 weeks.

- e) a. o. b. none - the meeting ended at 6.15 pm.
- f) d. o. n. m. - to be held in K-U-T offices on --/--/9--

Always remember to complete the Record of Meetings - Action list for each meeting held. Complete this record fully as Fritz hates to see any blank spaces.

Also: arrange a room for a meeting to be held in one of our conference rooms next Wednesday --/--/9-- at 2pm. There will be a very important guest requiring access by a wheelchair, so pls. choose a suitably accessible room.

You may have to reschedule meetings from time to time and also, always have alternative menu arrangements available should we have any guests with vegetarian requirements, etc.



## Interruption Task

[To be handed out after 30 minutes].

Please reschedule the meeting to be held on Wednesday --/--/9-, for 11am.  
Remember: wheelchair access is required.

Also, copy an extra three sets of the minutes of the meeting held on --/--/9- at 2 pm in the Board Room with the two union reps.

Apparently the Union is going to push for faster action!

Thanks,  
James S<sup>n</sup>

---



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# □ Assignment Sixteen:

## Beit Engineering plc

**Unit 9: Office Resource Administration**  
**Element 9.1: Maintain office supplies**

---

**Target Time: 2 hours**

### Main Skills

- |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                      |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ol style="list-style-type: none"> <li>1 Maintaining office supplies at operational levels</li> <li>2 Identifying variations in stock usage and, as a result, adjusting ordering procedures accordingly</li> <li>3 Dealing promptly with reported or witnessed equipment faults and/or any storage problems</li> <li>4 Safely handling and storing stock</li> <li>5 Keeping stock and issue records up-to-date, legible and accurate at all times</li> <li>6 Delegating tasks to others with accurately-defined instructions and monitoring progress of same</li> <li>7 Following and implementing security and confidentiality procedures at all times</li> <li>8 Following and implementing safe working practices at all times</li> </ol> | <ol style="list-style-type: none"> <li>3 Reconciling inventories as appropriate</li> <li>4 Following implicit and explicit written and/or spoken instructions</li> <li>5 Composing letters and memos from minimum guidelines, ie, written instructions from the principal</li> </ol> |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### Resources

Word Processor or Computer Terminal  
 Typewriter  
 Stationery – headed paper, memo paper, envelopes, etc  
 Stock Control Package – computerised system  
 Variety of office consumables – pens, paper – plain; and headed – A4/A5, highlighters, correction fluid packs, computer listing paper, brown wrapping paper, string, etc, spirit duplicator fluid, Gestetner duplicator ink  
 Stock Control Cards  
 Stocktaking Inventory Control Sheet  
 Photocopier  
 Telephone training equipment  
 Interruption task – to be handed out after 25 minutes

### Associated Skills

- 1 Prioritising tasks, as appropriate
- 2 Operating manual or computerised stock control systems



**BEiT ENGINEERING** PLC  
192 Kensington High Street, London SW7 3JH  
Tel: 081 673 4563 Fax: 081 673 9098  
Telex: 893546 BEITEN G

## Beit Engineering plc – Scenario

You were, until one month ago, employed as a junior stock control clerk in the general offices of Beit Engineering plc. You have, however, to your credit, been promoted to the position of senior stock control clerk with more autonomy and also much more responsibility. Privilege always brings responsibility and you have, on this occasion, been rewarded for enabling the company to track down where stock was disappearing to during a recent review of the company's stock control systems.

Hermione Bennett – your boss – has also been promoted and so has Albert Graham. These are your two principal leaders in Beit Engineering plc and it is to them that you answer, when required.



Hermione has a great fear of computerisation as she has worked all her life without the aid of computers and now sees no good reason why she should change. Mr Bennett – her husband – has decreed that, as long as Hermione still works for the company, she can continue with the manual system despite an outcry from Albert Graham who frequently, on the other hand, complains about irreconcilable differences and discrepancies between the two systems. He disagrees with Mr Bennett about allowing the two systems to run concurrently. You are, however, caught in the middle of this dilemma and frequently (as well as carrying out your official duties) have to keep these two from each other's throats.

You arrive at your desk to find that Hermione has left you a note. You have been off on a morning's leave during which time Hermione and Albert have had a violent disagreement. Try your best to sort out the problems she has left for you – without giving offence to either her, her husband or to Albert. Good luck with your tasks. Enjoy your work!

~~11.45am~~

You were lucky to be off on leave this morning. Albert (dreadful man) and I have had the most awful row about the stock control systems.

I, yes me, appear to have lost 200 reams of A4 yellow duplicating paper - God knows where! How am I supposed to know? Albert insists that the computer never makes mistakes. I agree that it seldom does, but I know, for sure, that he does.

I have been stock controlling and accounting for 39 years and I've never lost a biro, let alone 200 reams of <sup>A4 yellow duplicating</sup> paper.

Keep this altercation between Albert and me to yourself. I don't want my husband to find out.

Anyway, I'm working far too hard these days so I've decided to take the afternoon off to get my poodles clipped. I've pretended,

→

however, that Albert has upset me so much that I've had to go home to "lie down". Won't do him a bit of harm; he'll worry that Mr. B. will get an earful about him.

Anyway, could you update the manual records of the details I've attached for you on the Stock Control Cards. You'll need to make copies of these as I've only got the master copy left (attached).

Then, using the Stocktaking Inventory Control Sheets, update our current situation.

Then (and only then - not before) go to Albert's office and update his precious computerised system. There really isn't a lot of stock movement at present, so this shouldn't take you too long.

Oh, by the way, could you also telephone our printer and ask him to alter our

telephone and facsimile numbers to "0715"  
 on the next print run, also our other  
 stationery which contains these numbers.  
 I gather he, too, is all computerised, so  
 it shouldn't be difficult to do, at least  
 not if he's as clever as Albert! (Really,  
 I shouldn't, you know; AG was very kind to  
 me when I "feefee" - ~~my~~ <sup>our</sup> 3rd poodle - died  
 last year). For my darling little

Maybe, tomorrow will be a better day!

Lots of love,

Wahhard! (as usual).

H. Bennett







- 1) Prepare a Stock Control Card for each of the twelve items/office consumables, taking care to enter all details and seeing to it that these SCCs are kept:
- up-to-date;
  - legible; and
  - accurate.

In this way, we may be able to confound Albert and his dreaded computer.

- 2) Prepare a short report (200-250 words) about the stock of office consumables held by B.E. plc.
- do you feel it is adequate?
  - do you feel we either over- or understock certain items?
  - are there any obvious omissions?
  - also, do we really need all the paper which we currently appear to be holding?

NOTE: Money tied up in unnecessary office consumables "cripples" other, equally important, resource budgets!

- 3) There have been complaints from our Safety Officer - Mike Dunlop - that we are not taking cognizance of where we hold our stock of spirit duplicator fluid.

I, until Mike pointed this out to me, was totally unaware that this is highly dangerous fluid. Apparently it could cause us to disappear in a cloud of smoke - according to M. Dunlop.

Prepare large (red print) labels to mark the cupboard where this fluid should be stored.

Also type, or word process, a warning notice for the individual bottles and place a NO SMOKING: DANGEROUS CHEMICALS notice on the store door. Perhaps you should also check up the relevant legislation with Mike to ensure that we are complying fully with legal requirements.

- 4) Another safety issue. We are really a potential minefield for litigation!

Subject: KINETIC LIFTING AND HANDLING!

→ m f → ||

4 ctd

Amy Michael lifted 2 boxes of computer listing paper and hurt her back. She's now off work (on sick leave) for 2 weeks, at least, probably longer.

Research a suitable diagram about the correct way to lift boxes or heavy objects, knees, back position, etc and memo all 11 departments, the principal officer in each instance, who should then draw the matter of personal safety at work to the attention of each member of their respective departments.

(This should be done immediately, before any more catastrophes occur!)

5) The word processor suite containing the 3 IBM's should always be locked during lunchtime and before staff vacate this suite in the evening. Send Bloma memo from Mr. B. in this connexion as we are, I fear, going to lose this expensive equipment through theft or burglary!

This, too, is an urgent matter!

— o m/f 01)

Here is a list of stock issued up to today:

\* Amend SCCs as appropriate: \*

Monday

- 6 reams of plain A4 paper
- 2 highlighters
- 1 box of black biro pens
- 7 reams of yellow duplicating paper
- 2 computer ribbons
- 2 packs of correction fluid
- 1 ball of string
- 1 tube of Gestetner duplicator ink

Tuesday

- 4 boxes of computer listing paper (Albert no doubt!)
- 17 reams of A4 headed white paper
- 3 highlighters
- 5 computer printer ribbons

Tuesday ctd.

- 1 box of black biro pens
- 11 boxes of yellow duplicating paper.

Wednesday

- 13 highlighters
- 6 packs of brown wrapping paper.
- 8 balls of nylon string/cord.
- 1 bottle of spirit duplicator fluid  
(draw a form for those who use this fluid to sign accepting responsibility for its storage in the designated safety zone; print 3 copies for my approval - very imp!)
- 2 tubes of G. duplicating ink.

Thursday

- 6 packs of correction fluid.
- 1 bottle of spirit duplicator fluid
- 13 packs of brown wrapping paper  
[This seems a bit strange. Check where this

Thurs. ctd.

Went to and then issue a general memo indicating that only essential stock should be requisitioned. We must avoid "squirrels" with their "safe cupboards" of materials stashed away.

11 reams of A4 headed paper  
7 reams of A4 plain paper.

~~That's~~ That's it up until today!

- a) Complete SCCs; and
- b) Complete Stocktaking Inventory Control Sheet;
- c) Re-order (automatically) as necessary - as Senior Stock Control Clerk you have the power to do this.
- d) See if you can suggest any reasons why I and Albert differ (by 200 reams!!!!!! ..) of A4 yellow duplicating paper.
- e) ensure complete accuracy, legibility and up-to-date records.



**LIST OF OFFICE CONSUMABLES HELD ON:**

- (a) manual stock control system; and  
(b) computerised stock control system**

| STOCK NO | DESCRIPTION                         | STOCK ON HAND  | RE-ORDER LEVEL | MAXIMUM STOCK | MINIMUM STOCK |
|----------|-------------------------------------|----------------|----------------|---------------|---------------|
| 001      | A4 plain white paper – bond         | 92 reams       | 70             | 250           | 50            |
| 002      | A4 headed white paper – bond        | 160 reams      | 80             | 300           | 50            |
| 003      | Correction fluid packs              | 29 packs       | 25             | 75            | 15            |
| 004      | Black biro pens                     | 61 packs of 12 | 50             | 100           | 30            |
| 005      | Yellow duplicating paper            | 300 reams      | 100            | 300           | 100           |
| 006      | Computer listing paper – cut sheets | 62 boxes       | 50             | 150           | 25            |
| 007      | Highlighters                        | 47             | 25             | 50            | 15            |
| 008      | Computer printer ribbons            | 71             | 60             | 75            | 30            |
| 009      | Brown wrapping paper                | 26 packs       | 50             | 75            | 20            |
| 010      | String – nylon                      | 37 balls       | 60             | 80            | 30            |
| 011      | Spirit duplicator fluid             | 5 bottles      | 10             | 20            | 5             |
| 012      | Gestetner duplicator ink            | 9 tubes        | 15             | 40            | 5             |

## Interruption Task

[To be handed out after 25 minutes].

A call has come from Barry Berry in Reprography to inform you that the xerox has broken down! Can you fix/repair it, or should you call for an engineer?

Decide quickly; Barry gets very anxious if he doesn't get immediate results!

---

AG.

MEMORANDUM

Date:

From:

Subject:

To:

MEMORANDUM

Date:

From:

Subject:

To:



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# □ Assignment Seventeen:

## Party Planning

**Unit 9: Office Resource Administration**  
**Element 9.2: Maintain a petty cash system**

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**Target Time: 1½ hours**

### Main Skills

- 1 Identifying expenditure heads and obtaining approval
- 2 Obtaining approved funds in accordance with organisational procedures
- 3 Ensuring that receipts and other financial records meet auditing requirements
- 4 Identifying any need for adjustment to the imprest and seeking authority to execute this action
- 5 Following and implementing secure and confidential cash handling procedures
- 6 Issuing cash in accordance with organisational procedures
- 7 Identifying all errors or discrepancies and dealing with same promptly

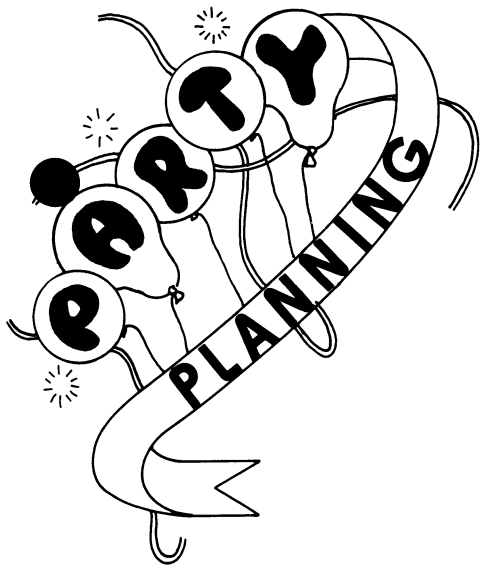
- 8 Following and implementing safe working practices at all times

### Associated Skills

- 1 Making accurate financial calculations
- 2 Using budgeting and budget control skills and abilities
- 3 Using oral and written communication effectively
- 4 Prioritising tasks as appropriate

### Resources

Typewriter or Word Processor  
 Petty Cash Forms  
 Petty Cash Book  
 Coins (float)  
 Ledger/Journal/Cash Book ruled paper  
 List of instructions – attached



412 Brompton Road  
London  
SW1X 5HF  
Tel: 081 456 2019  
Fax: 081 984 5310  
Telex: 578134 PARPLN G

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## Party Planning – Scenario

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You are employed at the offices of Party Planning, the worldwide Party Planners who are expanding and growing beyond all recognition. Despite the current growth, however, the owner of the company – Petra Kennington – is reluctant to employ more staff.

In times past you have typed up and prepared job descriptions for various other jobs for which Petra keeps on insisting she is going to place advertisements the next day; this, however, does not happen, with the result that you are still doing lots of jobs for the one basic salary and it is 'basic'. However, you enjoy your work and would be reluctant to leave, particularly since you get to meet so many interesting and varied types of people and you also have a fairly good expense account. Despite the fact that your job title has not really changed since you joined the company, you have certainly been given more responsibility and it has been the advice of those to whose advice you listen, that you should work yourself into a very strong position with the company to the extent that you know absolutely everything that goes on there. In this way, you will become indispensable and Petra will, sooner or later, realise this fact. She will rely upon you totally – indeed she already appears to be doing so.



Today you arrived in the office to find another midnight note on your desk, detailing a list of duties to which you should attend in the absence of Petra on another of her globetrotting missions. Carry out all her instructions and see if you can sort out the Petty Cash in particular. Someone, somewhere is not following the correct procedure and Petra is relying on you (again, I hear you say) to sort things out.

Read the instructions carefully and good luck with your tasks. Enjoy your work!

Thursday, 11.45 pm

By the time you read this memo I will —  
be well on my way to Geneva to see  
Willem Creuse — the movie star who  
is keen for us to stage an Extravaganza  
by Lake Geneva for his 25th birthday.

I'm looking forward to the trip, but I  
really needed to spend Friday in the  
office to attend to some of the problems  
which have arisen during the course of  
the week.

Firstly, there's the safety problems which  
Steffie, our safety officer, is still unable  
to solve. I find this a particularly  
perplexing issue.

Secondly, there is the Petty Cash problem.  
I just can't put my finger on the central  
issue of the problem but I wish I could.

— ▽ m/f

David, my partner, has suggested that we should simply dispense with our whole petty cash procedure and, instead, have staff apply for repayment of expenses incurred when they submit their monthly claims forms for expenses.

Perhaps you should memo all staff - ll at present, with note to come, funds permitting - and ascertain, by requesting a speedy reply, whether or not they would agree to this change in procedure. I don't see why they shouldn't. Perhaps we should have a meeting about this issue, although, in P.P., meetings seldom seem to solve anything.

At any rate, send out the memo as soon as possible and ask for replies within five days. If no reply is received it will be taken as agreement

→ m/f



to submit petty cash claims along with expenses claims on a monthly basis. The only problem I can foresee, if it is in fact a problem, is that staff will have to wait for up to six weeks to be reimbursed. Anyway, we can see how people feel about this.

It would resolve the difficulty of having to refuse to issue funds from time to time.

Also, in the meantime, remind staff in the memo that our upper limit is £15 per claim and that our imprest is only £175.

Budgets are allocated and reviewed quarterly in P.P. and there is no good reason why the petty cash budget should be abused.

P.

PS. If you have to restore the imprest at any time, seek David's permission.

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## Petty Cash Requests

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NB: a voucher (attached) should be completed for each claim and, where appropriate, a VAT invoice should be attached in order for the claim to be processed.

[BALANCE AT 11th = £134.11]

- 1 Brompton taxis – my fare to Paddington on the 11th – £6 (including gratuity).
- 2 Brompton taxis – David's fare to Heathrow on the 11th – £27 (including gratuity).
- 3 Flowers for reception – £15 – Stephens Florist, Brompton Road.
- 4 Milk – supermarket – £2.75.
- 5 Postage (2 parcels) – £6.75.
- 6 String and nylon cord – Ryman – £3.45.
- 7 Index cards – £2.35.
- 8 Room Perfume – Floris, Jermyn Street × 2 bottles (£5 each).
- 9 Carrier bags – new style – sample £42.50 (should this be in PC system?).
- 10 Window cleaners – £11.50 plus £1.50 tip.
- 11 Candles for Christmas display at reception – £6.79.
- 12 Tinsel for office Xmas tree – £13.45 – Harrods.
- 13 Sandwiches for guests – £9.75 – Pelle, Brompton Road.
- 14 Two cassettes for office music system – £7.99 each – Right Price.
- 15 Taxi fare – £5 – Joseph, Sloane Street to collect dress.
- 16 Balloons – red from Bernard's – £4.11.
- 17 Newspaper bill (reception) – £13.60.
- 18 Sellotape – 3 rolls – £3.12.
- 19 Mont Blanc Ink – £3.45.
- 20 Aqua Libra (4 bottles × £1.69) = £?.
- 21 Pot pourri for Petra's office – £3.50 (M&S).
- 22 Adhesive labels – 2 packs – £1.79.
- 23 2 correction ribbons for Pip's golfball typewriter – £3.68.
- 24 Taxi fare to Shaker, Brompton South – £13 (including £2 gratuity).
- 25 Dry cleaning of office table cloths – £17.50.
- 26 2 Black and white ring binders for Glorria presentation at Holy Trinity – £7.50 each.
- 27 Ian's bus/tube fare to Victoria £2.30.
- 28 2 erasers – Harrod's stationery department – £1.25.
- 29 Dry cleaning of office/reception curtains – Brompton Dry Cleaning – £10.
- 30 Donation to Cancer Research Campaign – £5.

Please enter all these transactions in the Petty Cash Book and ensure that you restore the Imprest to £175. Also make a list of those items which ought not to be in Petty Cash, eg, dry cleaning should come out of our Office Cleaning/Maintenance Budget.

Are there any requests for Petty Cash that you feel should be refused on the grounds that they should realistically come out of another budget?

Make sure that you indicate where VAT is included (or not) in each of the above 30 transactions and make sure also that all arithmetical work is accurate and legible.

Mary, when she kept the PC records, entered the details in such a mess that it was virtually impossible to decipher her handwriting; it was a disgrace and I am glad that she no longer has this responsibility.

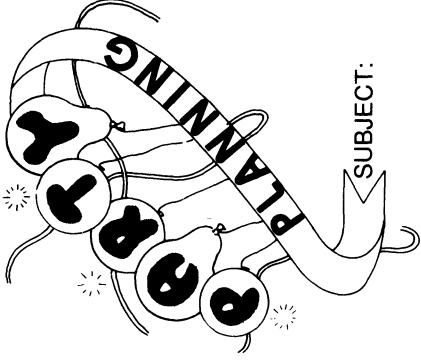
Also, please prepare a Job Description (yes, another one) for a junior accounts clerk and include the PC function as part of the Job Specification. Have all this done for me as quickly as possible (including the memo!).

PK (Ms)

**MEMORANDUM**

DATE:  
FROM:  
TO:

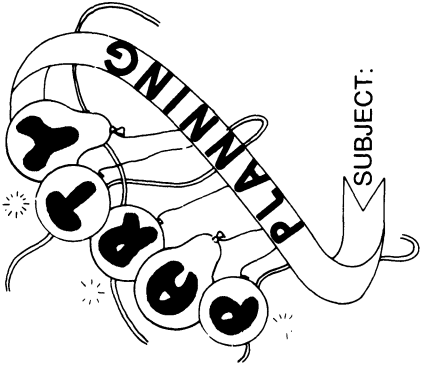
208



SUBJECT:

**MEMORANDUM**

DATE:  
FROM:  
TO:



SUBJECT:

**Petty Cash Voucher**      Date \_\_\_\_\_

No \_\_\_\_\_

| For what required | Amount | VAT    £ | Total    £ |
|-------------------|--------|----------|------------|
|                   |        |          |            |

Signature \_\_\_\_\_

Passed by \_\_\_\_\_      Folio Number \_\_\_\_\_

A valid VAT invoice must be attached to this Voucher if appropriate.

**Petty Cash Voucher**      Date \_\_\_\_\_

No \_\_\_\_\_

| For what required | Amount | VAT    £ | Total    £ |
|-------------------|--------|----------|------------|
|                   |        |          |            |

Signature \_\_\_\_\_

Passed by \_\_\_\_\_      Folio Number \_\_\_\_\_

A valid VAT invoice must be attached to this Voucher if appropriate.

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# □ Assignment Eighteen:

## S Patel Enterprises

**Unit 9: Office Resource Administration**  
**Element 9.3: Ensure the use of authorised banking procedures**

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**Target Time: 1½ hours**

### Main Skills

- 1 Processing all transactions accurately
- 2 Reconciling bank statements correctly
- 3 Identifying all errors and discrepancies and dealing with same promptly
- 4 Keeping records up-to-date, legible and accurate
- 5 Monitoring work progress and priorities to ensure that all deadlines are met
- 6 Delegating tasks to others in an accurately-defined manner and monitoring progress
- 7 Following and implementing safe working practices at all times
- 8 Following and implementing security and confidentiality procedures at all times

### Associated Skills

- 1 Processing accurately financial transactions and calculations

- 2 Processing relevant documentation accurately and efficiently
- 3 Reconciling bank statements to S Patel financial records
- 4 Maintaining records effectively and efficiently
- 5 Prioritising tasks as appropriate
- 6 Working with others and maintaining good, effective working relationships

### Resources

Cheques (for payments)  
 Credit Card Vouchers (for payments)  
 Cash (for payments)  
 Ledger/Cash Book and Journal ruled stationery  
 Bank Statements  
 Petty Cash Vouchers  
 Paying-in slips/Lodgement slips  
 Cash analysis forms  
 Foreign currency  
 Travellers cheques  
 Standing order forms  
 Direct Debit forms



**Tobacconist & Confectioner**

142 North Parade, Sheffield S2 3LP  
Tel: Sheffield 45637 · Fax: Sheffield 98350

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**S Patel Enterprises – Scenario**

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Since you started to work for Simon Patel and his wife, Rabab, at their retail outlet in Sheffield you have developed a wide range of secretarial, clerical, business and interpersonal skills.

Simon and Rabab are very ambitious to succeed in the retail business and they are constantly travelling all over the country looking and searching for new properties and opportunities to expand their ever-growing empire of small retail outlets – mainly CTNs, ie, Confectioners, Tobacconists and Newsagents. To date, they have been very successful and, from Sheffield, they manage (by remote control at times) no less than thirteen retail operations as far apart as Aberdeen to Aberystwyth with many outlets in between.

As you have stayed and progressed with the Patel Enterprises company, you have become more involved in the Office Resource Administration procedures that accompany a company the size of the Patel organisation. You have also become more heavily involved in the banking and money/accounting side of the company and this is particularly satisfying for you as you were an absolute 'ace' at dealing with this side of business affairs when you were training at College for your Level II Business Administration Diploma. Simon now kindly affords you day-release to study part-time for your Level III Diploma and you are actually being accredited for some of the elements on-the-job on the Patel premises.

For this reason, if for no other, you should read carefully the attached list of banking duties attached by Simon and Rabab and carry them out to the very best of your ability.

Simon and Rabab also like to 'holiday' and you have, for this reason, to deal with foreign currency. None of this causes you any problem as you are absolutely painstaking and meticulous in your work.

Read the instructions carefully and execute the tasks to the nth degree as prospects with the Patel group look good. Good luck!



Rabab and I popped in to Lunn Poly yesterday at 4pm to check out availability of last-minute flights for the pilgrimage to Mecca. To our surprise, however, we learned that we could travel out today to Jeddah for only £319 each. So - guess what!?' Yes, you've guessed correctly; we're off to Mecca later this afternoon.

Rabab is excellent; she always has two suitcases prepared and packed for our travels. We do deserve a break and it really couldn't have come at a more suitable time. We plan to open our 14th retail outlet in Brighton next month. So, we will be very busy indeed when we return.

Sorry to do this to you yet again. We seem to be constantly travelling all over the country, but I can assure you that we need to do this in order to keep tabs

on the business. Perhaps during our trip, you could look after the complete banking side of the business as this is, unfortunately, getting into a bit of a mess again.

Attached you will find a list of detailed instructions about lodgements, paying-in slips, standing orders, etc.

Please follow and implement safe working practices at all times and also follow and implement sensible security or confidentiality procedures as we are obviously handling large sums of money.

I'll telephone you soon to check that everything is running smoothly.

Thanks,  
Simon P.

## List of banking duties:

- 1) Lodge the cheque for £1114.50 from Patel (North) plc at the bank.  
Complete the relevant paying-in slip.  
Perhaps you could order a "paying-in slip" booklet to avoid all these little loose slips which become lost so easily.  
Draft a letter to the bank. I will approve and sign when I return.
- 2) Complete a standing order form for £200 p.a. payable on 1st January each year to Christian Aid - a well-worthwhile charity. This way we will know that we have made a contribution. Is this tax deductible? Pls. check.
- 3) Complete a cheque for £212.50 + VAT @ 15% in payment of our account to Mr. James Alun-Jones of Goldman plc.  
General crossing ~~please~~ please.

- 4) Maria's baby gives us a lot of pleasure and we'd like to invest some money for her. Could you collect some info. on building society & bank deposit/savings Yes, including TESSAs, although I have heard that the latter are for over-18s.

We'd like to make a present of £2,000 per year to the baby: Simon junior.

I think we may be eligible for relief under Capital Gains Tax or something.

I don't understand the details. Could you research this for me and summarise the main points on a postcard.

Also, postcard details for tax question @ (2) on page one.

- 5) Organise a booklet of travel cheques from Thomas Cook, comprising £50, £20 & £10 cheques. Total value - £500. This will always be useful to have as standby in



5 cont!

- case Rabab and I decide to have another quick holiday.
- 6) Do not take any money (especially cash) out of the outlet to the bank. Give all monies to Terry Harris who will deliver it to the bank in his car.
  - 7) Write a cheque for £ 117-95 payable to JJ Mulholland for car repairs and the servicing of Rabab's car. This figure includes VAT @ 15%.
  - 8) My bank balance was £ 5,034-09 on the Sheffield operation current a/c. Check out the new balance assuming all cheques will be presented within seven days and add lodgers on H.
  - 9) If you identify any errors or discrepancies, deal with these promptly.
  - 10) Set one of the junior staff to carry out the

bank reconciliation task and then please check it carefully.

11) Complete the "NOTE AND COIN ANALYSIS SHEET"

with the following float details at close of trade yesterday and total pls.

Also pass to Terry for banking apart from £100 for today's float.

|             |     |
|-------------|-----|
| £50 notes x | 10  |
| £20 notes x | 27  |
| £5 notes x  | 80  |
| £1 coins x  | 111 |
| 50p coins x | 67  |
| 20p coin x  | 87  |
| 10p coins x | 219 |
| 5p coins x  | 181 |
| 2p coins x  | 29  |
| 1p coins x  | 69  |

TOTAL  
ACCURATELY.

