



Executive Secretary & PA Skills Training Course

Courses in:

Management
Supervisory Management
Project Management
Communication
Customer Care
Sales
Personal Development
Human Resources
Finance
Administration

Dublin (Head Office) 01-8610700

Cork 021-4279511

Belfast 0845-3005207

Galway 091-500250

Manchester (UK) 0845-3005207

Website: PDLcourses.ie

Email: info@PDLcourses.ie

Contents

1 - Introduction	3
2 - Time Management	4
3 - Assertiveness Skills	6
4 - Communication Skills	8
5 - Organisational Ability	10
6 - Giving a Quality Service	12
7 - Managing the Telephone	14
8 - Conclusion	17



1 - Introduction

Staff who work in the 'front office' are vital members of any corporate team. Your performance is a major contributor into your organisation's success.

You are the first person to greet clients as they enter the office or call on the telephone. Therefore it is your impression which forms the basis of their overall impression of the whole company.

It's a big responsibility. Added to that all the other duties which you invariably have to perform, from secretarial tasks to the organisation of your boss' life, and it can be a very busy and stressful position.

Multi-tasking takes practise to perfect but with careful planning and monitoring your workload can be managed in a professional and efficient manner and also make your position more enjoyable.

You must first realise your own importance within the organisation and then learn to improve your existing skills and gain new ones.



2 - Time Management

If you are disorganised or are doing the wrong things, it is almost impossible to manage your job effectively.

Effective time management skills enable you to:

- Define clear objectives for your job**
- Prioritise tasks more effectively**
- Plan and schedule activities to achieve your goals**
- Organise your time to get the important things done**
- Manage interactions and interruptions**

Every day we are faced with hundreds of time use decisions.

These are usually identifiable when we ask ourselves: *"What shall I do next?"*
A better question to ask is: *"What is the best use of my time right now?"*

Those who make consistently good decisions about what to do next are the achievers.

Those who do not, tend to be very busy but achieve very little. They also tend to have higher stress levels and spend much more of their time "firefighting"

The only way to make that "what to do next" decision, is to know the priority of each task.

Prioritising involves two parameters:- **Importance** and **Urgency**

Importance is the extent to which an activity takes you towards achieving your objectives.

Urgency is a measure of how soon a task needs to be done.



Ask yourself the following question:

1 - How do you spend your time?

2 - What are your objectives?

3 - How much of your time is spent involved in activities which take you to these objectives

4 - Do you get bogged down by paperwork?

5 - Do you put things off?

It is only by examining how exactly our time is spent that we can evaluate the situation and make improvements.



3 - Assertiveness Techniques

Assertiveness helps to produce more open, healthy relationships and helps in goal achievement. It has a positive effect on the organisational climate and helps in conflict resolution.

Assertiveness has two components:

1. A positive attitude towards coping with issues that concern us and a capacity to deal with those issues in an expressive manner, conscious of our own rights, while being respectful to others. It assumes an ability to be able to put forward our case in a polite but firm manner. While acting assertively we can make demands and express anger, or assert our rights without attacking or weakening the other person. Assertiveness also involves an ability to be sensitive to others' needs and an ability to listen with understanding and empathy.
2. Whether the other party experiences our behaviour as being non-assertive, aggressive or assertive is very much affected by our mode of expression.

Non verbal behaviour is a major determinant of assertiveness. The primary sources of non-verbal communication are eye contact, facial expressions, body posture, gestures, tone of voice and timing.

Techniques for effective assertion

A Avoid emotional presentation: Being angry or hurt can take away your energy and confuse the issue and the goal. Stick to a clear straightforward message.

B Deal with one issue at a time: Be clear about the point you want to make and work on it until you resolve the matter. Only retreat when you are sure further progress is impossible.

C Be clear and direct: Lay the issue on the table fairly and squarely without pussyfooting or cancelling.



D Convey your feelings: Let the other person know how strongly you feel. Be honest and avoid exaggeration or false humility.

E Watch out for flack: Other people may try to side track or divert you. They may feel under pressure so let them have their say and return to your point.

F Don't steam roll: Others will have a viewpoint so accept the truth in what they say. Then return to your point.

G Openly admit error. If you are wrong say this openly and directly.

H Go for a workable compromise: Watch out for other persons' needs and try to meet those as well as your own.



4 - Communication Skills

Communication is a fundamental 'people' skill which we use to get things done and to develop relationships with other people.

Most everyday tasks require communication. We go through this process subconsciously and generally successfully. Sometimes however, with a little consideration and thought many situations can be improved if better communication was possible.

There are four fundamental communication skills:

- **Reading**
- **Writing**
- **Speaking**
- **Listening**

Surprisingly, out of this list, the two most important communication tools are Speaking and Listening.

Some important points to note when speaking are:

Clarity - Speak clearly, don't mumble

Tone - Sound friendly and interested

Modulation - Vary your voice so that it sounds interesting

For most people Listening is their weakest communication skill. Better listening comes from doing the following:

Concentrate

Don't interrupt

Don't judge

Clarify understanding by asking questions

Reflect back

Try some of these points next time you are having a conversation - be it with a colleague or a friend - you might be surprised how much more interesting it may be.



Questions

Another important communication skill is the ability to ask questions. Their purpose is to get and clarify information - and without information how could we ever find out what we can do, or what it is that we are supposed to be doing, for someone else?

In general, you should start with open questions; continue with probing questions; ask closed questions to establish critical facts and then summarise that point. Always be clear about the purpose of your question before you ask them.

Concentrate on using open and probe questions ('How do you feel about...') - but remember not to ask too many closed questions ('Are you.....'), unless the situation really calls for it.

The Ten Golden Rules of Speaking

Remember the following golden rules of speaking and you will capture your listener's attention and keep it:

- 1 Think before you speak
- 2 Speak clearly and attractively
- 3 Choose the best words - not the first words that spring to mind
- 4 Avoid ugly and lazy pronunciations
- 5 Don't slur or distort words
- 6 Use variations in pitch and rhythm to achieve emphasis and interest
- 7 Avoid irritating speech mannerisms
- 8 Don't rely on clichés
- 9 Make sure that your listener is following what you say
- 10 Know when to stop and allow others to have their say



5 - Organisational Ability

To successfully organise yourself and your day, all tasks should be assessed and prioritised.

There are four main types of tasks which can be listed in order of importance. Efficient organisation ensures that each one will be completed, but those that are considered more urgent will be given more priority.

Type 1 - Urgent and important

These tasks need to be done soon. They are everyday tasks that must be done to keep everything moving - the maintenance tasks. They are also the crises and emergencies that arise regularly in the course of a day.

Type 2 - Longer term activities

Depending on your job they may stretch out years in the future. They tend to be large and cannot be completed quickly and which normally require chunks of uninterrupted time. The only way we manage to get them done efficiently is to plan them. They fall into two categories:

1 Maintenance tasks - Maintenance tasks are those which have to be done to keep the operation running. They form part of our normal routine and we just do them. They require no justification and are safe and easy to do. They do not go away.

2 Progress tasks - These tasks do not *have* to be done. They are activities that enable us to develop; to move to a totally different position. Getting the time to do these normally requires some justification and may involve some risk if it doesn't prove successful.

Type 3 - Active and busy .

They tend to involve much activity and little progress. They are characterised by interruptions, phone calls and lots of little bits of tasks. You have more likely become used to your bustling. As an example, ask your self this question: do you interrupt your colleagues whenever you need to talk to them or do you meet them at a scheduled time?



Type 4 - Less urgent and less important.

They are usually on paper and may not need to be done at all. The consequences of not doing them are usually minimal.

Choosing between Type 2 and Type 3 tasks is difficult. We like to be active and busy and we tend to dislike the long term, planned tasks.

But while the Type 2 tasks can be avoided in the short term, their importance realises itself in the longterm and therefore must not be ignored.

The solution to the "What to do next" question is to opt for the Type 2 tasks more often and, if possible to minimise the Type 3's.

A realistic goal would be to reduce the time you spend on Type 3 by 10% and transfer that time to doing Type 2's.

Another Organisational tool is the "To Do" list

This is a simple list of unscheduled tasks and can be in any convenient format. To be effective it should be:

Written out at the same time each day, preferably last thing before you go home. This unloads the things you have been remembering during the day and enables you to switch off when you leave work. The list should be previewed at the start of each day to remind you what has to be done.

Limited to a maximum of about 10 items. Any bigger and it will appear too daunting.

Prioritised. Take some time to review the items on the list and label each task with a priority rating. (eg 1 - 4, as covered earlier)

Crossed off as the items are completed. Visibly crossing out the items gives a sense of achievement. Carry forward and undone items to the following day.

Your To Do list contains items which are not scheduled. It is not for meetings but for items which have to be done at some time. They are fitted in to the space between the scheduled tasks.



6 - Giving a Quality Service

1 Reliability

Reliability involves a consistency of performance and a dependability of service. Specifically this involves that you must:

- Be accurate in information given
- Keep records correctly
- Perform the requested service within the designated time period

2 Responsiveness

Responsiveness concerns the willingness or readiness of employees to provide service. How ever tedious, difficult or annoying your last task was must not be displayed to the next customer. Treat every call as if it was the first of the day. Specifically this involves you:

- Giving a prompt service
- Returning customer's calls quickly
- Showing interest in each customer

3 Courtesy

Dealing with people in a courteous manner is what quality service is all about. It involves politeness, respect, consideration and friendliness. But even if you are exercising all of the above, they mean nothing if not exercised with genuine intention. Smile with your eyes, not just your mouth when listening to people, and this includes dealing with people over the phone.

4 Competence

Competence means possession of the required skills and knowledge to perform the service required by the customer. A competent person will be more confident when relaying information to a customer than one who is searching for the information, at the same time as trying to assess what exactly the customer is looking for.



5 Credibility

Credibility involves trustworthiness and honesty. You must always have your customers best interest at heart. Discretion is something which must be realised at all times. It is not only your reputation that could be damaged due to a lapse in credibility but that of your company. Confidentiality is also another important aspect of maintaining your credibility within the market place. No customer would return to a business where their last transaction had become public knowledge.

This is also important when dealing with internal staff. Never repeat who is calling who and always be discreet with the knowledge that may be open to you.

7 Understanding

Understanding and knowing your customer involves making the effort to understand and know their needs. Acknowledging previous customers and welcoming them back offers people a great sense of comfort and belonging.

Specifically this involves:

- Learning the customers exact requirements
- Providing individual attention
- Recognising the regular customer

8 Tangible determinants of Customer Service

- Appearance of Personnel
- Attitude of Personnel



7 - Managing the Telephone

The telephone is one of the most important tools of communication available to you. Each call must be dealt with in an efficient and pleasant manner, whether it involves another member of staff or a client.

Identify yourself and your place of work. Greet the caller and offer to help.

Listen and find out what the caller wants

Jot down the caller's name and main points of the conversation

- Be sure to keep a pencil and paper (or message pad) close to the telephone.

Repeat the important points of the conversation back to the caller

- "So what you are looking for is..."

When transferring a call explain where the call is going

- Announce the caller to the person/department to which you are transferring and explain why you are transferring the call. Do not make the caller have to repeat the enquiry all over again.

When putting the caller on hold, check back regularly to see whether the caller still wants to hold.

- Do not banish your caller to the telephone limbo!

Offer to ring back if there is a long delay or if information is not immediately to hand

- Make sure you get the correct number and call back promptly

Finish the call politely and use the caller's name if possible

Follow up on the call

One of the most important points about handling enquiries is to anticipate them. If you know the answers to most of the questions people are likely to ask, you will not feel defensive or unsure of yourself.



Recap -

When answering the telephone always remember:

- A You are aiming to make the caller pleased that they chose to call your company
- B You are aiming to impress the caller with your courtesy and helpfulness
- C Answer the telephone with identification

Do:

- 1 Let your opening greeting identify you and your organisation.
Speak into the mouthpiece
- 2 Get your caller's name and use it. Try to recognise the voices of regular callers and other people in the company.
- 3 Let your tone be warm, friendly and interested.
- 4 If you have to ask the caller to wait - explain why.
- 5 Service your call on hold every 30 seconds - thank the caller for waiting.
- 6 Make the caller feel that you are anxious and willing to help
- 7 If you agree to call back at a specific time, call - even if you have been as yet unable to attend to the query or request.
- 8 Attend to a query NOW or you will forget. If there are other priorities, write down the c
- 9 Let your caller hang up first and say "Thank you for calling"



Remember that the caller can not see your face and so the warmth and enthusiasm, which normally conveyed in a smile, must be heard in your voice.

Do not ever:

- 1 Answer the telephone saying "hello" only
- 2 Be familiar or let personalities intrude
- 3 Sound bored, impatient or lose your temper
- 4 Say "hold on" and leave the caller holding
- 5 Contradict or argue - use the words "yes, however.."
- 6 Say "I don't know"
- 7 Forget to telephone someone back
- 8 Make the caller feel as if they are in the wrong
- 9 Bang the telephone down whilst the caller is still speaking
- 10 Carry on a conversation with someone else while on the telephone
- 11 Shout across the room to someone wanted on the telephone
- 12 Answer the telephone with something in your mouth
- 13 Wait for the caller to call back if disconnected, always be the one to try to get back to them



8 - Conclusion

Every position is different, just as every call or encounter is different, but if you use the basic communication techniques along with an increased awareness as to the importance of your position within the company you will find your skills improving, both at work and socially.

You are important and your position is important - this should never be forgotten.

Remember the following and believe in yourself!

- 1 BE PROMPT
- 2 BE POLITE
- 3 BE PREPARED
- 4 BE PRACTICAL
- 5 BE POSITIVE
- 6 BE PROFESSIONAL
- 7 BE PRECISE

