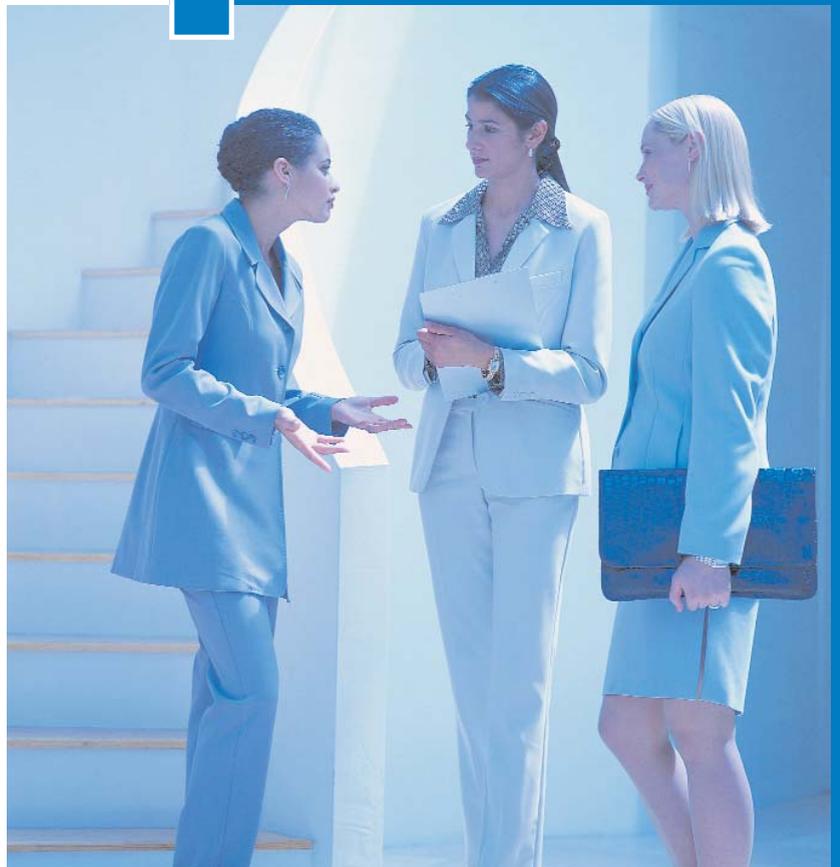


# Blueprint



For The Secretarial And  
Office Administration  
Profession



PRESENTED BY: CAREER SUCCESS Magazine &  
The PSA, with the support of Telkom and Avery

# CONTENTS

## PART 1

**Chapter 1: The Preface**  
 What is this Blueprint about? . . . . .2

**Chapter 2: The new world of work** . . . . .3

**Chapter 3: Introduction by the committee** . . . . .4

**Chapter 4: Overview of global developments** . . . . .5

4.1 World Wide Web . . . . .5

4.2 Wireless Technology . . . . .5

4.3 Innovation . . . . .5

- Instant gratification . . . . .5
- Hotdesking . . . . .5
- Cocooning and SOHO . . . . .5
- Human-friendly office buildings . . .6

4.4 Creativity . . . . .6

- Everyone can be creative . . . . .6
- Handling personal resistance to change . . . . .6
- When others fear change . . . . .6

4.5 Multiculturalism in the workplace . . .6

- Facing the challenge . . . . .7
- Handling resistance . . . . .7
- Making multi-national teams work . . . . .7
- Origin of research . . . . .7

## PART 2

**Chapter 1: IT, the 21st Century and secretarial work** . . . . .8

1.1 Technology at work in the modern office . . . . .8

- The technologies of the future . . . . .9

1.2 The impact of this technology on secretarial tasks/work methodology .10

**Chapter 2: IT and its impact on the secretarial profession** . . . .10

2.1 Job specifications will change . . . .10

2.2 Designations will change . . . . .13

2.3 Performance appraisals need to be reviewed . . . . .13

**Chapter 3: The Role and the job** . . . . .16

Critical components to the success of a 21st Century Secretary . . . . .16

3.1 Knowledge . . . . .16

3.2 Personality and character attributes . . . . .16

3.3 Experience . . . . .17

3.4 Performance skills and job profile .17

**Chapter 4: The Career: From Secretary to?** . . . . .19

4.1 The recognised levels or strata . .19

4.2 The emerging trends . . . . .19

**Chapter 5: Designations** . . . . .22

5.1 The traditional company . . . . .22

5.2 The progressive company . . . . .22

- Writing a job profile . . . . .23

**Chapter 6: Career events** . . . . .25

6.1 Obtaining entry-level qualifications . . . . .25

6.2 Getting a job . . . . .25

6.3 Doing courses . . . . .25

6.4 Getting certified as a professional . .25

6.5 Belonging to an Association . . . .26

6.6 In-house Forums . . . . .26

6.7 Receiving own professional magazine . . . . .26

6.8 Mentoring . . . . .26

6.9 Being promoted . . . . .27

6.10 Winning an award . . . . .27

6.11 Secretaries Day & Week . . . . .27

6.12 Research & Surveys . . . . .28

**Chapter 7: Training** . . . . .32

7.1 Formal and informal training . . .32

7.2 CPS® . . . . .32

7.3 Need for continual learning . . . .33

**Chapter 8: Codes of Conduct** . . .35

8.1 Code of Conduct for a Professional Secretary . . . . .35

8.2 Code of Ethics for Administrative Professionals . . . .36

8.3 Code of Conduct for a Professional Secretary attending events . . . . .38

**Chapter 9: Temping** . . . . .40

**Chapter 10: Awards, rewards and recognition** . . . . .41

10.1 Types of awards . . . . .41

10.2 Criteria for awards . . . . .42

10.3 Recognition as a reward . . . . .42

## PART 3

**Chapter 1: Resources** . . . . .43

**Chapter 2: Contacts for associations internationally** . . . . .44

## PART 4

**Appendix 1: The performance appraisal samples** . . . . .49

**Appendix 2: Career path as per first Blueprint** . . . . .62

**Appendix 3: Profiles of the Committee** . . . . .72

**Acknowledgements and Order Form** . . . . .74

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# What is this Blueprint about?

The Blueprint, the 2001 edition, aims to continue the mission of its first edition in 1995 - which was a world-first document aimed at positioning the secretarial profession as a profession.

As documented in the first edition, this profession has been catapulted into the limelight due to the advent of a technological revolution to office equipment and communication technologies.

The Secretary finds herself on the receiving end of most of these innovations, and whereas some companies and its management have gone a long way in recognising that the Secretary has evolved into a team member, many are sadly still locked in a paradigm of yester-year viewing their assistants as little more than octopus-like stenographer/typists/answering service.

The Blueprint's mission is to erode these misconceptions, and to enlighten the marketplace of the necessity to wake up, accept and recognise the new profile of the profession.

The dawning of the new millennium and the beginning of a new century is as dramatic for us as it was 100 years ago, when our forefathers were suddenly faced with steam ships, telephones, factories and growing urban centres!

It was hugely dramatic for workplaces then! Our workplaces today are facing the same level of dramatic change!

Our concept of office has changed - mobile offices, virtual offices, home offices have made us revisit our definition of our work space.

Our concept of telephone has changed - mobile phones, cell phones, SMS, phoning through the Net have made us understand wirelessness.

Our concept of business has changed: teleconferencing, e-commerce, m-commerce, videos and catalogues online for immediate buying and selling, have made us understand a 24 hour business clock and to eliminate distance as a problem.

Our concept of product purpose has changed - fax machines that can copy; cell phones that can pay bills, laptops that connect to the Net, switchboards which answer and direct calls, have made us understand that multi-purpose is not impossible. This has translated to human beings who have learned to multi-task as well.

Our concept of connectivity has changed: Whereas we used to have to change TV channels on the set itself or records/CDs manually on the system, we now use remotes. Networks are in place and you can be anywhere in a building typing documents and have it printed at a central printer. The advent of the e-mail has meant that you don't even have to print the document for the person it is intended for.

Our concept of home-help has changed - intelligent washing machines, dishwashes, microwaves, central heating has lightened the 5-to-9 burden of the busy executive; and so has the advent of the pre-prepared foods and pre-cooked meals made life easier.

More change is on the way - see Part 2, Chapter 1 - and with it an ever-evolving office and inevitably an ever-evolving secretary.

This Blueprint, and its future editions, will record the evolution; promote the need to consistently assess the impact on the secretarial profession; provide roadmaps where these are necessary; stimulate discussion and encourage progress; and ultimately be the voice for a profession that has existed for centuries - since the stenographer monks to today's Office Managers - and will continue to exist for years to come!

If anyone ever doubted the critical importance of a Secretary, then why is it that the Managing Director can be away from the office for a week and all runs smoothly, and the Secretary is away for 2 days and chaos erupts!

The answer is - the Secretary is the heartbeat of every office! If that fails, the other organs, as important as they are, somehow collapse.

# The new world of work

by Ana-Maria Valente

**W**hen we compiled the first edition of The Blueprint, in 1995, we had no Cell Phones, no E-mail, no Voicemail, no Internet!

The way we liaised with one another to share our research, confirm our meetings and exchange ideas was through the telephone and fax machine - which now seems so ancient! This time round we e-mailed one another, so that there were no frustrations of missing one another on the phone! We researched on the Net and e-mailed the research instantly! What a pleasure!

If just the E-mail and the Net had such a radical efficiency impact on this committee, imagine how Secretaries worldwide have changed the way they work and communicate.

Five years ago, we were already alerting the profession to the impact of technology and its reverberations on office life in general, and the secretarial profession specifically. We made reference to the virtual office, and we indicated how secretarial titles would evolve into titles that were more specific and more appropriate reflections of actual duties and responsibilities.

Like "Doctor" is an umbrella title used by the medical

profession, we all know that in that profession there are surgeons and dermatologists, GPs and Paediatricians. Similarly "Secretary" is an umbrella term for any number of administrative jobs, and it is just as important for these professionals to have a title that best describes their area of focus or status. Therefore titles such as Management Assistant; Executive Assistant; Administrative Assistant and Office Manager have become popular. When Secretaries are responsible for office management or bookkeeping, then it is only correct that their designation should reveal their specialised area of expertise or responsibility.

**H**aving said this, it is equally important to note that in Seth Godin's opinion, as per an article featured in [www.thecompany.co.za](http://www.thecompany.co.za) on 19 April 2000, there could be another evolution in the titles/designation issue. We refer you to Part 2, Chapter 5.

As we sail into the 21st Century, technological innovations will be more frequent and more pervasive. Consequently, it would be impossible not to have technology as the driving spirit of what this new edition of The Blueprint has to offer the secretarial community in terms of what it suggests for policy and direction.



*"See the opportunity  
in every difficulty,  
not the difficulty  
in every opportunity."*

Source: Orina

# Introduction by the committee\*

Ana-Maria Valente, Estelle Fleming, Judy van der Merwe, Lucia Hewitt, Miriam Kondowe, René Potgieter, Ornella Trinco, Susan dos Santos

**D**ue to the fact that the workplace is changing so rapidly, the Secretary/Office Professional needs, in our opinion, to become a computer software expert.

impact on the rural areas of the world, giving them access to progress and development as they will not need to rely on cables and electricity.

Whereas in the past, our technical skills were prevalently typing, shorthand and telephone handling, today we need to demonstrate our command of "Office Suite" packages, which typically includes word processing, spreadsheets, databases, presentation and scheduling software. A major asset for our profession will be our ability to continue learning and mastering technical skills in new and emerging technologies.

All these developments present the most exciting challenges and opportunities for our profession. Clearly, we are moving into an era where only those who have an open-mind to the need for continual learning will survive, and only those who thrive on change and innovation will succeed.

**W**hen we agreed to be part of the committee that would compile the 2001 edition of The Blueprint, we viewed



Ana-Maria Valente



Estelle Fleming



Judy van der Merwe



Lucia Hewitt



Miriam Kondowe



René Potgieter



Ornella Trinco



Susan dos Santos

These technologies will dramatically affect communication - which is at the core of the new Secretary's role and responsibility. Expect many developments to those new-fangled items we already know. For example, cell phones progressing from useful to indispensable items for info/banking/communication; seeing whom you are talking to will become common; palm-sized computers will become wireless. And in some respects, communications will require less human work/intervention as machines learn to communicate with one another.

It as a major challenge and tackled the first meeting with trepidation, and some anxiety but above all with unbelievable excitement! It was a unique opportunity to dedicate time and attention to our profession, as well as a unique opportunity to grow as we proceeded on the journey of discovery.

A major development will be the Wireless Revolution, which besides dramatically affecting the way executives and sales people work by making them fully mobile, will

Our wish for the secretarial profession, as it progresses and evolves into an impressive profession of the 21st Century, is that it continues to be populated by people like you and us, who are its fervent practitioners and ambassadors. And equally, that it continues to attract young people of quality, who see the enormous challenges of running an office efficiently, as not only a great career but also a great honour and privilege.

# Overview of Global Developments

**We have decided to focus on 5 areas:**

- World Wide Web**
- Wireless Technology**
- Innovation**
- Creativity**
- Multi-Culturalism in the workplace**

## 4.1 World Wide Web

The advent of the www and dotcom factor in our office life, has made it important to become proficient in Web page creation and content coordinator for your employer. Knowing how to navigate the Internet to gather information assists research tasks, and above all, can impact on how you provide information to your customers, which impacts on customer service in the future. Equally relevant is knowing about e-commerce and its various applications. Being able to buy and sell on the Web will become a prerequisite for companies.

## 4.2 Wireless Technology

The International Development Corporation predicts that by the end of 2002, the majority of Web users will use wireless technology rather than wired technology. It is also predicted that sending communication through a wireless device will cut costs dramatically.

Soon the boss will no longer have to carry his/her laptop around - computers will be fully mobile and the boss can log onto the Web and access all the documents/data needed. In fact, that famous expression "Mia casa, sua casa" will become "your office, my office."

**The impact is felt primarily in:**

- Communications - the 24 hour cycle.  
Gone is the 9-to-5-business day. Business can be done 24 hours a day.
- Conferencing/meetings.  
Video conferencing on the Internet becomes a reality, thus changing the way that one coordinates events forever! Also reducing the need to travel to attend every meeting.
- Office efficiencies.  
As buying moves increasingly to the Net, acquiring

equipment for the office or stationery or booking travel or couriers, becomes much easier. Companies display their catalogues on Web sites and you choose, pay and it gets delivered.

- The Intranet factor.

After Internet, came the Intranet, which will also evolve and become more customised and personalised. On your Intranet you will be able to stay informed of your company news, events and policies but Intranets will evolve into permitting you to organise many aspects of your life - including domestic/home necessities, via services such as e-butlers, you can organise your dry-cleaning, order groceries, catering, weekends away etc.

## 4.3 Innovation

Innovation is an ongoing process and it's impacting not just on how we work, but also on our environment and the way we live, which means that we have little option but to adapt to the changes that occur. Who can risk being left behind!

**Instant gratification:** Our society has become a "fast consumables" one that demands instant gratification - this impacts on business and satisfying customer expectations! The fast food/ready-to-wear mentality will apply to people's expectations of products - i.e. instant or quick availability!

**Hotdesking:** The result of the office environment moving into hi-tech is that time and distance are no longer an issue. In terms of job security, things have changed in many organisations as employers opt to contract part of the workforce, and in some companies "hotdesking" is in place, where various people share a workstation - this is possible as they come into the office at different times and hence can make use of the same workstation without clashing.

**Cocooning and SOHO:** This fast pace of innovation and progress has changed the family culture as we know it, and in some countries, people are finding a need to "cocoon" - perhaps a longing for the past and a release from the everyday stress of life. Innovations and progress have an impact on one's well-being and therefore people are looking to

build better home environments that they can use as a get-away from the daily pressures of the work environment. This is also seen by the growing numbers of home offices.

**Human-friendly office buildings:** All these developments have also impacted on the architecture of office buildings, and modern architects are designing buildings that are more human-friendly by adding green areas, better air and light. Progressive companies are adding features that are almost hotel-like, such as attractive and open reception areas where staff can sit with clients for small meetings; cafeterias and smoking areas; gymnasiums; childcare facilities; gardens etc.

As we move into the future, with more mobile and/or home offices becoming a reality, a company's headquarters will be mainly populated by the core staff.

The question many people ask is: Will the 21st Century Secretary be part of the core staff or will (s)he be a home/tele-worker?

The answer is: Both! There will be organisations which will require this Communication/Office Manager to be at headquarters every day, just as there will be organisations that will employ some to be at headquarters and others on a tele-work basis. Those Office Professionals who prefer to provide more technical skills will be those more likely to be able to opt for home/tele-work as technology will facilitate the receiving and dispatching of the tasks.

#### 4.4. Creativity

Progressive companies encourage their people to think beyond conventional paradigms and to examine traditional methods and products using non-traditional thinking.

Surviving and thriving in this brave new world will require office professionals to look at creative solutions to everyday challenges.

The need to look at work procedures and processes with different eyes and innovate, will be a valuable asset.

**Everyone can be creative, as creativity can be stimulated by various factors:**

- Unexpected challenges, problems, and opportunities.

- Other people's achievements suddenly stimulate new ideas for ourselves.
- Encouragement from peers, superiors and clients can lead to creative solutions.
- Boredom can also act as a catalyst for creative change and innovation.

Making creativity part of your paradigm will bring you much personal growth and professional satisfaction. Convincing your colleagues and peers to be part of it may be easy in some cases, but may meet with resistance in others.

#### Handling personal resistance to change:

- The biggest obstacle in resisting change is Fear. One becomes accustomed to a comfort zone and therefore will likely resist anything that might threaten that comfort.
- It is also easy to fear the unknown, or fear ridicule, failure and rejection.
- Resistance may also derive from stubbornness and selfishness - not wanting to change the way in which one is accustomed to doing things.

(Recommended reading: "Who moved my cheese" by Dr. Spencer Johnson).

#### When others fear change:

To avoid this type of fear arising in colleagues

- Create a supportive environment.
- Arrange for mentoring through role-modelling.
- Change the medium of communication.
- Arrange for training where required.

When all else fails consider attending change management courses.

#### 4.5. Multi-culturalism in the workplace

*"If the world had a name, that name would be dialogue"*

Virtually all over the world one finds that workplaces today are populated by personnel of different cultures and races. If you work in South Africa, America, Japan, Germany, Brazil, or any country you can think of, chances are that in your department or team you have people of different cultural backgrounds.

And we all have to work together towards a common goal. Sometimes it's possible to co-work harmoniously and the differences are not an issue; in some cases the awareness of vast differences in

approach to work does lead to anxiety and even conflict. Preferable to conflict is to familiarise oneself and understand our colleagues' predominant cultural traits or religious beliefs wheresoever they are manifested in behaviours. This could range from the way you greet one another to observance

of religious holidays or even the way you communicate dissatisfaction and disappointment.

The more progressive companies have awareness and training programmes on interpersonal skills across cultures.

## Multi-culturalism: Facing the Challenge

### Here are some basic guidelines:

#### Implement Awareness Training

- Training should be organised by experienced professional facilitators.
- Information sessions are an alternative. These should make use of dialogue, reading material and audio-visuals.
- Role play is also effective: it can be enriching to place yourself in the shoes of another person. The most important aim of this training should be to improve productivity and social inter-action by cultivating an understanding of other peoples cultures.

#### Alternative to training

- Self-teaching: Read more about the habits and customs of other cultural groups. Learn to manage differences and empower others by initiating dialogue in search for common ground.
- Do-it-yourself mediation: When there is misunderstanding or resistance to others, promote empathy and non-conflictual discussion and the need to share perspectives. Together write a Code of Conduct.

#### Handling resistance

- Resistance to change, whether yours or your colleagues, can be a huge obstacle in achieving positive results. Difficulty in accepting or understanding others' behaviours, values or priorities can handicap the whole reform process.
- Encourage the principle of letting go of inherited bias (which influences perception of cultures) and of the view that one's own particular values and beliefs are superior to others.

### Making multi-national teams work

- Although creating an awareness and informing members is a good starting point, it is an incomplete strategy. Training and behaviour tools that work are necessary.

#### Also necessary:

- A continued willingness to learn and understand how others think and feel. Keeping an open mind to determine common ground for all.
- Being tolerant and truly accepting that all people are different.
- Voicing differences, and discussing each other's idiosyncrasies.
- Sharing, empowering and listening to harmonise working relationships establishes friendship, support and a win-win situation.

### Origin of research

- Nedcor Mortgage Collections Johannesburg: goals and objectives of department, Mrs Li Gruber.
- Dr Wilma Senekal, Guest Resource Services, Pretoria, article Vodacom, and telephonic interview.
- Society of Advocates - Doret Johnstone-Robertson, Essie Raath and Evelyn Fourie interviewed and secretarial opinions.
- Article Internet: the Tocqueville Business Connection <http://www.adetocqueville.com/xculgmt.htm>
- Article Internet: this is an appendix of the revised 2nd ed. of managing differences: how to build better relationships at work and home by Daniel Dana PhD which is used as a sourcebook for workplace mediation and training seminars. <http://www.mediationworks.com/mti/cultdiff.htm>

# IT, the 21st Century and secretarial work

**In this chapter we take a look at some key issues:**

- ❑ **Technology at work in the modern office**
- ❑ **Impact on secretarial tasks/work methodology**

## 1.1 Technology at work in the modern office

**What does a 21st century office have and use? Here is a menu of possibilities:**

- Internet/the Web
- Intranet
- E-mail/voicemail
- E-commerce/m-commerce
- Wirelessness
- Video conferencing
- Convergence of technologies
- Cell phones/SMS - Short Message Service
- Satellite
- Digital technology (cameras, scanning, digital lines)
- Modems
- WAP - Wireless Application Protocol
- Encryption (chips)
- Electronic telephony
- IBR - intelligent voice recognition/electronic worker.
- Dragon - voice file
- Automatic translating system

Although, some offices can only boast of some of the technologies listed above, the above menu shows the direction offices are taking in technological tools.

In terms of the Internet, in October 2000, Fortune magazine published a 132 page special issue on the future of the Internet. (See page 9)

## 1.2 The impact of this technology on secretarial tasks & work methodology

**The major impact is felt:**

- Firstly on reduction of time to perform certain duties as technology has speeded up doing the task and its delivery.
- Secondly, there is a measured cost effectiveness resulting from these technologies; and
- Thirdly the 21st Century secretary is empowered by mastering them and becoming indispensable as many bosses still lag behind.

A negative impact is that there is an increased dependence on the equipment, and in some cases it can also lead to possible abuse of the technology available. (At the time of going to print, Internet abuse and E-mail misuse at the office are hot topics. Companies are beginning to understand the importance of AUP - Acceptable Usage Policy for their employees. There is a realisation that unrestricted access exposes companies to productivity gaps, band width abuse, and even legal liabilities.)

The need to keep abreast of innovations will be essential for survival. These innovations call for new skills often not even imaginable! Which one of us would have said as recently as 2 years ago that we would be creating and designing web pages! And booking travel online!

The new roles and responsibilities will be in regular flux and evolution in order to meet the work and communication demands of highly technological workplaces. Furthermore, the already witnessed blurring of lines between managerial and administrative functions will continue. Factors such as personal digital assistants added to this equation will cause even the most traditional thinkers to accept the evolution of the secretary to a coordinator supreme.

The message to management is that development of the secretarial role is dependent on a constantly reviewed agreement between the "21st Century Secretary" and the "21st Century Management".

The message to secretaries is that as they witness many of the traditional structures and support systems disappear, they have to learn to become more autonomous, self-reliant and sustain a passion for their work.

The message to trainers and training institutes is that they have to relook at their curriculae, and ensure that they train in relation to workplace and office realities, and have to let go of textbooks and manuals that are pre-internet-dated.

## THE TECHNOLOGIES OF THE FUTURE

### Here are the key points and prognostics

- **Over the next 7 years, in brief:**
  - Microprocessors will progress from the one-gigahertz chips just coming to market in PCs, to something like 60 gigahertz;
  - PC hard drives will hold one or more terabytes instead of 30 to 40 gigabytes that are now becoming standard on hard discs;
  - Speeds from office networks to the Internet will reach 100 megabits per second;
  - Cellular phones will be integrated in a single worldwide standard that encompasses fast data communications, so that you can use your cell phone as your only phone;
  - Integration of the technologies so they can all work together;
  - Cell phones will know where you are, and digital devices will be able to send your data, pictures, video or music wherever you might be: office, home, hotel or aeroplane;
  - Voice over IP (VOIP): by routing voice over the Internet, it will change our notion of what a phone company is; an Internet service provider can become a phone company too. The most far reaching effect is that voice can take over from the keyboard. You can access the Internet while driving through voice commands.

### The key to all these technologies is broadband technology.

- **Broadband Technology:**  
 With a broadband line, you don't hang up. Today we still have off switches on our computers, but with broadband one is always connected; able to receive continuous streams of voice, video and Net services. Think of broadband access like access to water.  
 Broadband is short for broad bandwidth and describes the throughput of a network per unit of time, measured in kilobits, megabits, or gigabits per second.  
 Examples of wireless broadband - you can download a movie before going on the plane and then watch it during the flight; business people can tap into their corporate networks at any time and replicate anything they could do at the office.
  - **Peer-to-Peer Technology:**  
 With this technology, even the lowliest PC attached to the Net can be a repository of information for everyone else, serving up Web pages, music files and even spare computing power to other users. Napster is the first mass-market incarnation of peer-to-peer computing - the music files that users share are not stored on a central server but on the PCs of the users themselves.
  - **XML:**  
 HTML and XML both encode information on the Internet. HTML helps create the Web pages; XML describes the information itself, like a bar code on packaged goods. XML integrates data, and facilitates business-to-business transactions as the Net will have its very own language.
- Source:** A précis of the points made in Fortune Magazine, October 2001.

*\* Please see centrespread on video conferencing*

# IT and its impact on the secretarial profession

**Three key areas need to be relooked at:**

- Job specifications**
- Designations**
- Performance appraisals**

**2.1 Job specifications will change**

Office Professionals will be multi-tasking: Playing the roles of "assistant", "type-setter", "newsletter author", "public relations officer", "mediator", "coordinator", "problem-solver", "Internet worker" etc .

Employers will be looking for and hiring only those professionals who have not only the multitasking skills, but also the attributes of: flexibility to handle these various facets, sound work ethics and integrity, ability to cope with and manage stress, keep up with the demands of a global village, and those who can speak more than one language will have the competitive edge.

*We read in Verve of The Star, Wednesday 20 September 2000, a newspiece by Richard Price published in the Daily Mail, London, in 2000*

**PA' s A Class Above The Boss**

They are fluent in several languages, hold more than one degree, control million-pound budgets and are to be found at the helm of some of Britain's leading companies.

And their bosses are nearly as talented.

According to research, more than half of Personal Assistants are better qualified than-or just as well qualified as-their employers.

A remarkable 52% of PA's involved in the study were found to outperform their bosses in terms of qualifications, while their language abilities were vastly superior.

The study by the Internet Company Desk demon revealed that about the same number of PA's as bosses had first degrees, with 37% of both having graduated from university. However, PA's beat their managers when it comes to additional qualifications, such as post-graduate degree or vocational certificates, with 15% having extra diplomas compared with 8% of bosses.

A Spokesman for the British Institute of Directors described the results as "interesting but in truth not terribly surprising".

Business policy adviser Richard Wilson said: "It is true that a lot of British business people and entrepreneurs tend to leave school early, and as a result their qualifications are not terribly impressive.

"The skills and qualities of the United Kingdom's top business people are very creative and not so much to do with their education. But obviously there are an awful lot of very capable PA' s out there who are of enormous

value to their companies".

Wilson added that British managers were less qualified than their counterparts in France, Germany and the United States.

"I think many US business people benefit from going to business school, whereas in Britain, a lot is learned through trial and error".

The survey interviewed 100 PA's from a cross-section of British business, including FTSE 100 listed companies.

Three out of 10 spoke French, German, or Spanish fluently and a further 4% were competent in other languages. Nine in 10 of their bosses admitted lacking language skills.

The study estimated that between them, British PA's controlled R20-billion in office spending power. And they are also the most web-literate of all employees, with 75% using the Internet every day.

Sharon Probyn, PA to the Managing Director of Buckinghamshire-based Westfield Training Limited, is among those Office Managers better qualified than her employer.

Fluent in French and with a degree in business and economics, she is frequently left to run the furniture import firm while her boss travels the world on business.

"It is very annoying when people are demeaning about the role of a PA because I don't think they realise quite what the job entails," the 39 year-old said . "Times have changed since I started out. Back then, you were regarded as just a Secretary, but now you are treated as an integral part of the business.

"This company turned over more than a million pounds last year, and you have to be capable to deal with figures like that". - Daily Mail, London

**An addition to the new job specs is the role of the Secretary in the important issues of:**

□ **security and cyber crime.**

We have all, in one way or another, experienced electronic terrorism and cyber crime- E-mail viruses and hacking of sites have brought to our life whole new experiences of fear.

Some people still believe that network security is simply a technological issue related to software and servers, but in reality, it involved people and processes as well. It really is very easy to check the Internet Provider and the full user details. You don't need to be a computer hacker to find out who uses the computer and which company has ownership of it.

A way of solving one problem in today's fast running electronic world, is by making companies aware that they need to set their network security policy in order to ensure that a security solution will meet their company's objectives effectively.

There are five main areas which will form a solid framework to implement a secure electronic network security policy:

- Access verification and control - information is verified, controlled and access is granted by a pre-determined security policy.
- Privacy by secure links - secure communication means that other people on the network cannot see the contents of the message being sent.
- Authorisation/authentication - granting rights for users to perform actions that would otherwise be disallowed and making sure that communication is conducted with the intended user.
- Integrity - the property of data or information resources have not been improperly altered or destroyed.
- Management - consistent framework for managing the security products and procedures.

What is the Secretary's role regarding security? What if employees spend all day surfing the Internet looking for pornographic material? What if hackers access company databases of confidential information?

The challenge for today's Secretary, as the person who spends most of the time at the core office and on the computer, is to be an integral part of the teams that address these problems in a constructive way, and formulate knowledgeable E-mail/Internet strategies and policies. (See overleaf for a sample of a document on E-mail usage.)



## IMPORTANT QUOTES FROM THIS BLUEPRINT

*"The Blueprint's mission is to erode misconceptions, and to enlighten the marketplace of the necessity to wake up, accept and recognise the new profile of the secretarial profession". □*

*"The Secretary is the heartbeat of every office! If that fails, the other organs as important as they are, somehow collapse". □*

*"Technological developments present exciting challenges and opportunities for this profession. Clearly, we are moving into an era where only those who have an open-mind to the need for continual learning will survive, and only those who thrive on change and innovation will succeed". □*

*"Our wish for the secretarial profession, as it progresses and evolves into an impressive profession of the 21st Century, is that it continues to attract young people of quality who see the enormous challenges of running an office efficiently, as not only a great career but also a great honour and privilege". □*

**A sample of what some companies are starting to do, and communicating the decision to employees:**

**subject: E-mail content scanning**

An E-mail content scanner, has been installed in our corporation. This content scanner will scan all inbound and outbound E-mail to reduce the risk of viruses and malicious code. In addition, E-mail bandwidth will be reduced by preventing the proliferation of unproductive E-mail.

For all mail that is stopped and deleted, the sender and recipient will be notified by E-mail.

On the first day of October 2000, a rule will be implemented to stop and delete all chain letters and on 12 October 2000 all video images will be included in the rule. If there is a valid business reason for you to receive and/or send any video images, please contact J Petersen of the IT dept to receive your application form wherein you will specify your reasons/motivation. If your application is successful, your E-mail address will be excluded from this rule".

Another sample of what some companies are doing re AUP: and informing "subject: Internet, Intranet use" The purpose of this policy is to inform employees of their rights and obligations and at the same time, to ensure that employees have been notified formally of the existence of a monitoring system. With this advance notification, employees will not be put in any embarrassing situation, and the right of XYZ Pty Ltd to monitor Internet usage will not be in question.

The term "Internet" is collectively used to include the terms "Internet", "Intranet" and "Extranet" and any further variations of this terminology. The following guidelines describe the acceptable use of the XYZ Internet, Intranet facilities.

**1 Policy on Internet usage**

**1.1 Acceptable uses of the Internet**

The Internet services provided by the company are intended to be for business purposes only. XYZ encourages the use of the Internet because it is an efficient and effective tool. However, the Internet services are XYZ's property, and their purpose is to facilitate company business.

Any improper use of the Internet services is not acceptable and will not be permitted.

**1.2 Unacceptable uses of the internet**

XYZ Internet access may not be used for transmitting, retrieving or storing any documents or communications of a discriminatory or harassing nature or materials that are obscene or x-rated. Harassment of any kind is prohibited. Electronic media may also not be used for any other purpose which is illegal or against XYZ policy or contrary to XYZ's best interest. Solicitation of non-XYZ business or any use of the internet for personal gain is prohibited.

**1.3 Software**

To prevent computer viruses from being transmitted through XYZ's systems, there will be no unauthorised downloading of any unauthorised software. All software downloaded must be registered to a XYZ company. Employees should contact internal information systems if they have any questions in this regard.

**1.4 Copyright issues**

Copyrighted materials belonging to entities other than XYZ may not be published by employees on the company's Internet systems, except with the express permission of the copyright owner. All employees obtaining access to other companies' or individuals' materials must respect all copyrights and may not copy, retrieve, modify or forward copyrighted materials, except with permission, or as a single copy to reference only. Failure to observe copyright or license agreements may result in disciplinary action up to and including termination.

**1.5 Security**

Internal information systems in XYZ routinely monitors usage patterns of its internet systems. The reasons for this monitoring are many, including cost analysis/allocation and the management of XYZ's gateway to the Internet. All data created, sent, or retrieved over the company's internet systems is the property of XYZ and should be considered public information. XYZ reserves the right to access and monitor all information transmitted over the company's Internet systems.

**1.6 Violations**

Any employee who abuses the privilege of XYZ's access to the internet will be subject to disciplinary action. XYZ also reserves the right, should it be considered necessary, to advise appropriate legal officials of any illegal activities relating to the use of XYZ's Internet or other information systems.

**2.2 Designations will change**

21st Century Secretaries will demand and get the titles that are concomitant with the work they do. As the workplace may move into a context that sees people describe themselves in terms of what they “do” rather than what they “are”, this whole issue of designations will evolve into something quite different. We refer you to Chapter 5.

**2.3 Performance appraisals need to be reviewed**

Progressive organisations have performance appraisals that are transparent, democratic and allow for joint assessments. Traditional methods of having a Senior Executive appraising a staff member via scales of 1 - 5 or 10 are not appropriate in the new world of work.

We are going to suggest a model currently used in a leading South African finance company, as a point of departure for debate and application.

**NB** See Part 4 Addendum 1: The criteria for selection was based on its clear attempts to obtain

a fair assessment of a worker, regardless of the role and responsibility they may hold.

**Key points highlighted:**

- The worker plays a role in selecting the five appraisers.
- The results direct decisions regarding advancement or career planning/development.
- The results direct decisions regarding pay increases.
- The appraisal is done on a six-monthly basis and is based on outputs and competencies of a particular work profile.

**The results are one of three things:**

- The appraisee is not meeting requirements and needs mentoring, coaching or development (denoted by a ‘-’ sign).
- The appraisee is meeting requirements 100% (denoted by an ‘=’ sign).
- The appraisee is exceeding all outputs and competencies (denoted by a ‘+’ sign).

*We asked another company, Palesa, who do a tremendous amount of work on Performance Appraisal to comment on assessing Secretaries.*

**PERFORMANCE APPRAISALS**

At Palesa we believe the basic principles governing performance management for Secretaries do not differ from other functions. The process does present special challenges because the roles and competencies of Secretaries have, in the past, often not been clearly defined. It has been difficult because of the multiplicity of different tasks that Secretaries are required to undertake and because of the wide range of levels at which the Secretaries operate.

This point is critical because a “Secretary” may range from a typist and/or receptionist to an Executive Personal Assistant who in practice may well operate as an executive in her own right.

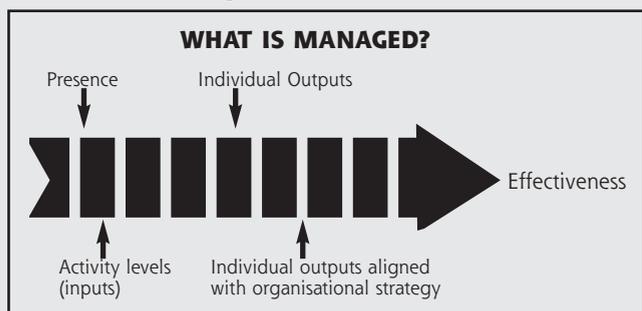
Our view is that the key to effective performance management for Secretaries is therefore to ensure the appropriate profiling of roles, identification of the competencies required at different levels, and the development of suitable performance measures in line with sound performance management practice.

There are many different approaches to performance management. We have found from extensive experience

that the one developed by M. Armstrong is one of the most useful. He defines performance management as: “a strategic and integrated approach to delivering sustained success to organisations by improving the performance of the people who work in them and by developing the capabilities of teams and individual contributors”.

The basis for his approach is “the simple proposition that when people know and understand what is expected of them, and have been able to take part in forming those expectations, they can and will perform to meet them”. This sums up the critical fundamental issue in meeting performance agreements: a shared commitment to what is required in the role, how best those requirements can be met, and how performance can be enhanced through development.

The areas managed in the course of the process are illustrated in the diagram below:

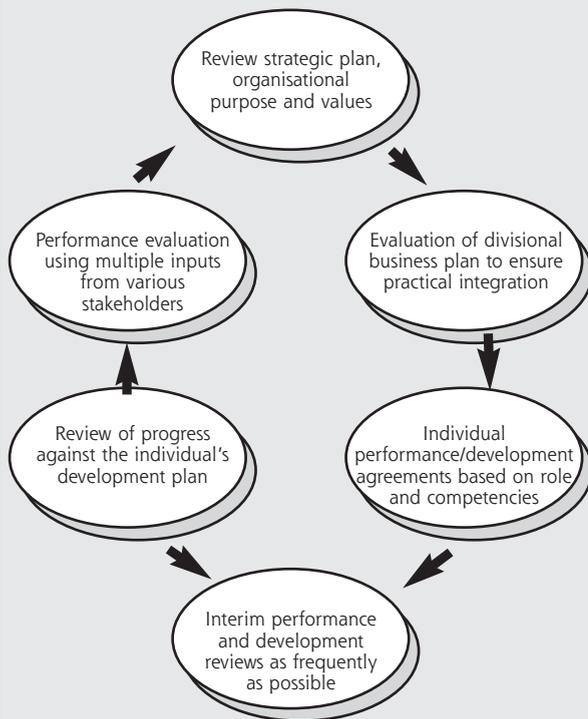


**An Output Orientation**

Effective performance measurement has become critical in a business environment that is highly competitive and subject to constant, rapid and radical change. To determine the "value add" of an individual in any function within this complex context, it is necessary, in order to evaluate performance objectively, to assess it in terms of actual achievement: in other words, outputs from a given set of inputs, rather than activities or perceptions of performance. In the past, secretarial performance measurement has tended to be subjective - often based entirely on the evaluation of a single manager.

In setting a performance agreement for a particular role, the challenge for any manager and incumbent is to agree what will be achieved as a result of the work being done. Role clarity is therefore central to effective performance management. The process obviously needs to be integrated into the existing organisational systems, structures and time scales, but typically would consist of the following basic elements.

**PROCESS**



The actual performance management cycle from the agreement to final evaluation would extend over a year, while the two initial steps would be completed prior to the start of this cycle.

**Performance agreement**

The important aspects of the performance agreement are that it should acknowledge inputs but focus largely on

outputs and measures. It should also include objectives and standards of performance, competency assessment and agreement on development plans.

Performance management is concerned with agreeing on expectations, making and implementing plans to meet them and monitoring and reviewing outcomes. These expectations are defined and agreed in the form of objectives, and/or standards of performance, and competencies,

- Objectives describe what is to be accomplished.
- Performance standards are a statement of the conditions that apply when a job is being performed effectively.
- Competencies are skills and knowledge necessary to do the work required in the specific role.

An outline of the procedure required when setting up performance agreements and an example of a performance standard for one sample output for a specific secretarial role are given below:

**Steps to follow in setting up performance agreements**

To prepare a comprehensive performance agreement for a Secretary's role, the following steps are required:

**Preparation - First Session**

In a discussion between the Secretary and Manager, establish the following:

- A broad understanding of the organisation's strategy, and more specifically, the business objectives of the department in which the Secretary works;
- Determine if the Secretary's performance agreement applies to the current role, future job requirements or both.

**Performance Agreement - Second Session**

In a discussion between the Secretary and Manager:

- Decide on the purpose of the role.
- Decide on the outputs of the role.
- Decide on measurement criteria for each output.
- Decide on activities relevant for each output.
- Decide what competencies are required for successfully completing each activity.
- Set objectives for each output.

The objective agreed between the manager and the Secretary should be SMART i.e:

- Specific
- Measurable
- Achievable
- Relevant
- Time bound

**This generic example illustrates the basic elements for a sample output at a particular secretarial level:**

**Role:** Executive Secretary/Personal Assistant  
**Job Purpose:** To provide secretarial services at an executive level  
 To provide Administrative Services at an executive level  
 To ensure effective cross-functional liaison at an organisational level

**Output:** Meetings co-ordinated  
**Measurement:**

- Purpose of meeting clarified
- Logistics of meeting co-ordinated
- Appropriate communications to all stakeholders

**Activity:**

- Agenda available and distributed
- Meet chairperson to clarify purpose and requirements of the meeting
- Arrange the venue
- Confirm equipment required
- Confirm food and beverage requirements
- Notify all stakeholders of the meeting - confirm their availability
- Distribute the agenda timeously
- Confirm final arrangements

**Competencies required:**

- Computer literacy
- Software application skills
- Office procedures
- Planning
- Managing differences
- Organising
- Interpersonal skills
- Problem-solving skills
- Leadership skills
- Business communication skills
- Performance management
- Working with teams
- Business/organisation knowledge

Our experience is that in the case of Secretaries these issues often need to be carefully defined because the role, especially at the higher levels, involves considerable interactive capabilities and outputs which are not always easy to identify and evaluate in the same way as mechanical, time-based outputs.

**Conclusion:** Despite a widespread reluctance to tackle these issues, it is essential that they be addressed for a variety of reasons. Most compelling are the aspects of global competition and the need to develop learning organisations.

But there are many others:

- The need to meet equity, skills development and labour relations legislation
- The need to engage all employees in achieving better and quicker ways of doing things
- The war for talent in every area of business and
- The need to tame new technologies which, by their power, present huge opportunities but also serious threats.

In meeting all these challenges, Secretaries provide a vital communications interface and their performance is therefore crucial.

Effective performance management of secretarial roles, with the concomitant development, therefore offers organisations a significant opportunity to achieve a competitive edge and at the same time enhance the professionalism of the whole secretarial stratum in the business world.

# The Role and the Job

In brief: A Secretary manages information.

Whatever the task of a modern secretary, it has as its backbone the coordination and processing of information and maintaining efficient work flows.

**There are four critical components for the new millennium Secretary to be efficient and effective:**

- Knowledge**
- Personality and Character attributes**
- Experience**
- Performance Skills**

## 3.1 Knowledge

The 21st Century Secretary and office professional is more than just a support employee blindly following instructions. Initiative and some decision-making are necessary in today's offices, and this cannot be accomplished without having knowledge of the industry (s)he works in.

In the past, the criteria for being rated a good secretary was based mainly on typing, shorthand, filing and answering the telephone - technical skills that could be performed equally well whether one worked in Finance, Manufacturing or a Government office.

Today, although technical skills are important, the focus has also moved to being an active team member, and as such make contributions to the effectiveness of procedures or of projects or budgets or events and last but not least, problem-solving - consequently, to make contributions to work efficiencies and results, it is essential to know the main dynamics of the industry or field within which one operates.

## 3.2 Personality and character attributes

- **Being open to change, and flexible in order to cope with the unexpected, are vital**  
Comfort zones are disappearing at a rapid pace, as management has to make decisions based on the marketplace's moving dynamics and targets. Whether this involves merging with another company, retrenching staff, replacing products, going to new markets in different continents, opening a

store on the Internet, management has to be able to count on a workforce that can keep up with the fast pace of change.

- **Being dependable and self-motivated are also key attributes**

Employers are looking for people they can rely on to fulfil tasks without needing constant supervision; and management equally appreciates people who can keep performing without having to be told what to do next. Self-motivated people with good follow-through are a real asset to managers who are often away on business or spend a lot of time with clients, and therefore need to depend completely on sound office management.

- **Being diplomatic and knowing etiquette and protocol**

As new job requirements see the 21st Century Secretary attend to more senior tasks and mix with people at higher levels - who could be foreigners from anywhere in the global village - it is useful to be au fait with the required behaviours and etiquette.

- **Interpersonal Skills - the ability to work with others is one of the most valued personality traits**

Although misunderstandings, anger, and conflict can be part of office life, the ability to seek resolution and the willingness to move forward to better interpersonal relationships is what counts. Interpersonal skills are also critical when dealing with customers and suppliers; the ability to maintain good working relationships cannot be underestimated.

- **Being assertive and showing good judgement**

Knowing when to be firm on principle without being aggressive is a key skill. Also important, is to know what's the best action to take in office situations - when to decide, proceed, direct, agree and also when not to! Judgement requires wisdom, and wisdom comes from experience and from knowing what you don't know!

These attributes are intrinsic to some people but not all, and so a combination of experience and training are required.

### 3.3 Experience

Most employers value an experienced Office Professional. This is harsh for the novices, because in order to get experience they need to start somewhere.

Experience can be acquired by changing jobs/departments in the same company; by changing jobs but staying in the same industry; by changing industry; or by temping in a few different companies.

Different departments or different companies, provide different work style experience and opportunities to get new skills or knowledge.

When experience is missing, novices should make up for it by ensuring they are as best trained as they can be.

### 3.4 Performance skills and job profile

The skills that today would profile a job spec can be categorised in five areas:

- Technical
- Administrative
- Coordination
- Communication
- Management

As each company and industry has specific needs, the spec that goes under each of the five areas above would have some differences. Whereas in some companies budgets would be included under Administrative, others may have bookkeeping; under Technical, expect Web page design or maintenance to start featuring as a required skill; under Communication, PR duties may be expected in some companies.

By using Appendix 2 in Part 4 of this Blueprint, and including the pointers in this chapter as well as the precepts of change outlined in this edition as a whole, you should be able to compile a profile of tasks and responsibilities for each of the five areas above applicable to your current position.

To assist you in your compilation, we have provided you with a sample list/checklist of skills and tasks that would fall under each area. But please note that it is a general list and does not represent any specific status, such as Executive Secretary.

In compiling your own job spec or profile, choose all those that pertain to your current role, and add any other tasks which our checklist may not have included.

(Continued overleaf)



*“A Zen master once asked an audience of Westerners what they thought was the most important word in the English language. After giving his listeners the chance to think about such favourite words as love, truth, failure and so on, he said: “No, it’s a three letter word; it’s the word ‘let’. Let it be. Let it happen.”*

Source: W. Timothy Gallwey

## Checklists for the 5 areas of your job profile

### Area 1: Technical

Knowledge of and competence in word processing and data software packages  
 Knowledge of presentations software (PowerPoint etc)  
 Competence in professional layout for letters, reports, circulars, newsletters, office forms etc  
 Proof-reading  
 Filing - paper and electronic  
 Faxing  
 Note-taking  
 Competence in dictaphone  
 Answering telephone  
 Competence in E-mail and voice mail  
 Working with scanners and digital cameras  
 Knowledge of Web page/site maintenance  
 Working with modems and/digital lines  
 Using e-commerce and encryption  
 Video-conferencing dynamics

### Area 2: Administrative

Handling correspondence  
 Petty cash control systems  
 Handling mail distribution  
 Banking/electronic  
 Invoices/payments  
 Budgets/forecasting/wages  
 Ordering & purchasing stationery/supplies  
 Control & maintenance of office equipment  
 Update manuals/policies  
 Staff welfare (flowers, gifts etc)

### Area 3: Coordination

Travel bookings and itineraries  
 Diary management (paper and/or electronic)  
 Event coordination & Meetings  
 Video/teleconferencing

Training events & induction programmes  
 Relocation of premises/equipment

### Area 4: Communication

Call management - incoming & outgoing  
 Professional message taking  
 Liaising with staff  
 Greeting and handling visitors  
 Liaising with customers  
 Handling queries and complaints  
 Composing correspondence and documents  
 Working knowledge of Public Relations & Company Image principles  
 Knowledge of protocol and etiquette

### Area 5: Management

Knowledge of company & the industry it operates in  
 Knowledge of operational procedures

Managing the office  
 Knowledge of, and implementation of business and data recovery systems  
 Recruitment of staff  
 Supervise & mentor support staff  
 Identifying training requirements  
 Maintaining good customer relations  
 Managing complaints - internal and external  
 Evaluation of projects  
 Representing manager

NB When you have completed your own checklist of tasks and responsibilities, see the note we have under Part 2, Chapter 5, the note for Progressive Companies. This note advises you on how to write your job profile.

### Survey

You may find it also relevant to note that according to a survey and research conducted in 1998/9 by IAAP - The Institute for Administrative Assistants, the following trends emerged:

- i. Secretaries are:
  - Expanding into more technical and managerial roles; Handling a wider variety of duties beyond strictly clerical roles
  - Increasingly using Internet; Increasingly taking on roles as trouble shooters
- ii. Team work in the office
- iii. Salaries are increasing
- iv. Training and supervision of staff
- v. More telecommuting
- vi. More outsourcing of clerical and specialised functions - companies are using staffing agencies for lower-level clerical support.
- vii. Secretaries also are:
  - Doing less of the following tasks - receptionist duties; manual tasks, such as paper filing, copying (more electronic exchange/copies);
  - Assuming the following new tasks - Web site design and maintenance, electronic scheduling, project management, participation in meetings, desktop publishing, newsletters, annual reports, negotiating with clients and vendors.

# The Career: From Secretary to ...

- ❑ **The traditional career path**
- ❑ **The emerging trends**
  - **Moving into management**
  - **Moving out of the profession**
- ❑ **The career calendar**

In the first edition of The Blueprint, a career path was outlined. We refer you to Appendix 2 at the back of this edition.

## 4.1 The recognised levels or strata

<i>Traditional title</i>	<i>Modern title</i>
Switchboard Operator/ Telephonist	Telecommunications Operator
Typist	PC Operator
Receptionist/Reception Secretary	Frontline Officer
Junior Secretary	Information Coordinator/ Junior Management Assistant
Office Assistant Secretary	Office Coordinator Management Assistant/ Administrative Assistant
Senior Secretary/ Admin Secretary	Senior Admin Assistant/ Office Manager
Executive Secretary PA	Executive Assistant Executive PA

Over the past five years, having sent copies of the first Blueprint all over the world, the feedback we have received shows:

- Everyone who received a copy agreed that such a Blueprint was long overdue.
- That The Blueprint provided a clear message regarding the importance of awarding the secretarial profession the kind of status that other professions enjoyed.
- That not only secretaries were buying copies for themselves, but also Human Resources Depts, Training Depts, and Secretarial Colleges. Were equally interested in a document that provided them with guidance.
- That new titles/designations for secretaries were welcomed and implemented by progressive companies; but very traditional companies and secretaries were hesitant or slow to change.

- That among the progressive companies, some of the new titles were introduced.
- That among the traditional companies, other titles in the organisation had changed - such as personnel officer to HR Officer or Sales Officer to Business Development Officer, and even introduced the title of CEO, but the conservatism applied to the Secretaries titles.
- That some colleges and secretarial depts in training institutes even changed the name of their courses or qualifications (from secretarial to office administration or office management) in order to stay more relevant to a changing workplace.

The above feedback has placed a tremendous responsibility on the compilers of this second edition, as the views expressed vis-à-vis career path and designations, has a marked influence in the marketplace.

As this edition is a roadmap for the next couple of years, it is important to outline that the suggestions made in this chapter, are inspired and based on what has been said and outlined in the preceding chapters, and which can be summarised into 6 fundamental points:

- That the world of work is more hi-tech.
- New demographics showing multiculturalism.
- A new 24 hour round-the-clock business day.
- Client expectations of immediate gratification.
- Flatter management structures.
- Work can be performed from places other than conventional offices.

In the light of the above, we believe there will be key trends.

## 4.2 The emerging trends

- Some companies will only start now to look at changing the secretarial titles and career-path, and find that the first Blueprint - Part 1, Chapter 3 - is where they are right now; but it's never too late to start.
- Some companies will continue to promote the

status of the new secretary and award them benefits that befit their status, such as business cards, petrol and travel allowance, grooming allowance, management training etc.

- The more progressive companies will, in a couple of years, be moving away from formal titles for people to descriptive designations, such as suggested by Seth Godin (see Part 2 chapter 5 page 23).

For those secretaries who will be awarded managerial responsibilities, we provide a check list of the characteristics that are needed - some of them are inherent, but some can be acquired through training and work experience.

### Moving into management

#### Checklist:

Management characteristics

- **Personal attributes**

Persevering  
 Open-minded  
 Tolerant  
 Responsible  
 Self-motivated  
 Team-player  
 Keen observer  
 Has strong character  
 Enjoys self development  
 Able to communicate  
 Has positive attitude  
 Looks for opportunities  
 Flexible  
 Can be a role model  
 Hard working  
 Patient  
 Committed and has staying power  
 Empathetic  
 Persuasive

- **Psychological**

Can accept change  
 Has courage  
 Able to take risks  
 Wants to make a difference  
 Needs purpose (meaningful) in life  
 Builds own self-esteem  
 Can be assertive  
 Has realistic perspectives  
 Understands need for continual learning  
 Resists emotional "battering"  
 Overcomes obstacles

- Has bounce-back strength
- **Skills - Theoretical and Practical**
- Soft Skills required
- Customer service
- Interpersonal skills
- Motivating others
- Leadership Skills
- Networking
- Ability to laugh and have fun
- Ability to influence others
- Recognise & reward outstanding performance
- Create & encourage a learning environment
- Tact, diplomacy and etiquette
- Creative thinking and problem solving
- Conflict resolution and crisis handling

- **Hard Skills**

Decision-making  
 Negotiation  
 Delegation  
 Sets up diverse communication channels  
 Manages change and transformation  
 Defines and set performance criteria  
 Redirect under-performance  
 Budgeting  
 Time and project management  
 Running meetings effectively  
 Basic Sales, Marketing skills, PR skills  
 Basic understanding of financial statements  
 Planning  
 Project and industry knowledge  
 Basic Human Resources and labour skills  
 Organisational skills

### Moving out of the profession

There are secretaries who are today Directors of companies or Public Relations Practitioners or Sales Executives, and they left the profession for various reasons, among which are:

- Frustrations at lack of opportunities
- Limited scope and responsibility
- Employer will not promote
- Salaries do not match responsibility
- Unhappy working conditions
- Lack of recognition
- Work not satisfying any more
- Colleagues/superior hindering progress
- New qualification acquired

Often the Secretary holds a bridge position before she makes the full leap; and the bridge position is one where (s)he gets the feel for the new responsibilities.

Bridge positions are successful if the employer assists and supports and the candidate finds her/his niche. When candidates in this transition stage do not succeed the reasons could be:

- Lack of self-confidence or fear of failure.
- Lack of support from managers and supervisors.
- Inadequate amount of time to prepare for the bridge position and no on-the-job coaching provided.
- Concerns about impact of new workload on lifestyle.
- Absence of role models who have made it.

Some secretaries who leave the profession return simply because they miss the excitement and the variety.

- **The career calendar**

A secretarial career is built like any other career by continuously upgrading and improving one's skills and progressively climbing the ladder of responsibilities.

**The early years:**

The first phase is for laying the groundwork for a rewarding career in the future. The novice secretary should concentrate on her speed and accuracy and learning as many software programs as possible. Develop a pleasant and confident voice and a fluent

speaking manner on the phone and off the phone. Screening calls correctly is also an acquired skill. General office support work is expected such as filing, faxing, photocopying, postage and correspondence handling.

**After the first six years:**

Secretaries are in positions of more responsibility as they are more proficient and mature. The positions offer more scope for decision-making and managing/buying items; attending meetings; organising travel, coordinating functions etc. etc. Work becomes satisfying in its variety, and interpersonal skills are honed.

**After twelve years:**

The secretary is now developing managerial skills and is able to hold the fort in the absence of the boss.

The career is showing rewards as this professional is working for a senior person, dealing with important people and attending key meetings. The job is immensely fulfilling for those who have grown and attended various courses. The administrative and organisational skills should be well developed as well as etiquette, diplomacy and a thoroughness in approach to all work. Often in the know of confidential matters, this professional understands ethics and integrity.



*"Don't be afraid to take a big step  
if one is indicated.*

*You can't cross a chasm in two small jumps."*

*Source: D. Lloyd George*

# Designations

As summarised in Chapter 4.1 secretaries today should either have the recognised titles such as Administrative Secretary, Executive Secretary or PA, or already one of the more modern ones such as Administrative Assistant, Executive PA, Office Administrator or Office Manager.

All these are explained and profiled in Part 4, Appendix 2.

*From the IAAP Web site <http://www.iaaphq.org/ResearchTrends/JobDescriptions2001.htm>*

We see their glossary of  
**Admin Job Descriptions**

(Source: OfficeTeam 2001 Salary Guide)

- **Administrative**
  - Junior Administrative Assistant
  - Administrative Assistant
  - Senior Administrative Assistant
  - Executive Assistant
  - Senior Executive Assistant
  - Human Resources Assistant
  - Sales Assistant
  - Marketing Assistant
  - Office Manager
  - Senior Office Manager
  - Specialized Medical Secretary
  - Word Processor
  - Executive Word Processor
- **Switchboard/Receptionist**
  - Switchboard Operator
  - Receptionist
  - Front Desk Coordinator
- **Office Support**
  - Mail Assistant
  - Office Assistant
  - Senior Office Assistant
- **Data Entry**
  - Data Entry Specialist
  - Senior Data Entry Specialist
- **Customer Service**
  - Customer Service Representative
  - Senior Customer Service Representative

As said elsewhere in this Blueprint, one still finds the odd company treating its secretarial staff as appendages to managers and supervisors and therefore no career

pathing is in place; all secretaries regardless of qualifications, experience and seniority are called secretaries. Dynosauric company attitudes and policies fortunately will be forced to change as the dynamics of the 21st Century place the secretary on centre-stage.

The Blueprint, is therefore, an essential document, not only for secretaries themselves and their Associations, but for Human Resources Managers enabling them to keep pace with the developments, and formulate policies and career-pathing for the secretarial profession in line with the rest of the progress the company is experiencing.

So how does a traditional company and a progressive company tackle the hot issue of designations?

## 5.1 The traditional company

Read Part 4 Appendix 2 of this Blueprint, and rectify the situation by following the strata recommended.

At each stratum or level of the career, you are given traditional designations and the option for more modern ones.

Aligning the company to these designations starts placing the secretarial professionals in a new light of independent stature and importance. What this means is that secretaries are given a title that corresponds to where they are in their career and company status, independently of the designation of the boss!

It is also important to read what we suggest for progressive companies.

## 5.2 The progressive company

For companies who already have career pathing in place for secretaries, reading Part 4 Appendix 2 will show you more modern designations as an option.

However, if the designations for secretaries are already in line with current trends, then it is important for you to start writing job specs and profiles

which are written in phrases or sentences reflecting the appropriate action verb.

**Writing a Job profile**

**Example 1:** *Travel arrangements should be written as follows:*

*Organises travel arrangements for Managers in the executive office or co-ordinates travel arrangements for all staff's business travel.*

**Example 2:** *Liaising with customers should be written as follows:*

*Handling incoming calls from customers and direct or manage queries and complaints or Screening all customer calls and routing them appropriately.*

**Example 3:** *Filing and retrieval should be written as follows: Keeping accurate filing and retrieval records or setting up filing and retrieval procedures for own office and company.*

You will notice from the above that the verbs used are critical in terms of reflecting responsibility level; it is one thing to query coordinate and another to manage. Equally it is one thing to screen and route calls and another to handle them.

Every task must be performed in an area of responsibility, therefore, needs to be written in a way which clearly and unambiguously specifies the role required. An observation or analysis of all the verbs used in the profile will reveal the status and level at which the secretary is i.e:

How many "manage" verbs are there?

Ditto for:

administer	answer
budget	check
coordinate	control
compile	compose
communicate	creating/setting up
evaluate	handle
keep	liaise
maintain	mentor
monitor	order
organise	prepare
present	process
report	represent
research	route/re-route
supervise	train
use	update

The above 30 verbs should provide you with a good menu from which to write a job profile. The essence is to provide a job map that empowers and liberates - not one that is vague and limiting.

What is also rewarding is the clarity obtained regarding one's actual role and level of responsibility. A frequent complaint from secretaries is that they do not know exactly the level of decision-making they have or the level of control they can exercise over a task or situation. This is soul-destroying. A job-profile written in the manner suggested above immediately reveals where the secretary stands vis-à-vis her responsibilities and where she can grow.

But the exercise of writing specs this way is important for another reason. As said elsewhere in this Blueprint, according to the author Seth Godin (see below) in future we may be describing ourselves in "doing" verbs rather than "being" verbs. The reason being that few of us will hold one occupation or one job.

i.e.; whereas now you say "I AM an Executive Secretary" in a couple of years time you may find that it will be far more appropriate to describe what you do as :

- " I run an office" or
- "I manage the administration in the executive offices" or
- " I coordinate events and travel: or
- " I manage the office for my boss" or
- " I coordinate information and people at the office" or
- " I set up and manage office procedures" etc.

When you get to the stage that you describe yourself as above, your management and peers in other professions will be doing the same.

Your CEO of today is likely to be describing himself as:  
 " I head the team that runs the company"  
 " I own an XYZ company"

If (s)he is not the CEO but a Senior Manager, the description could be as follows:

- " I head the marketing team" or
- " I develop business opportunities for the company", etc.

The reason author Seth Godin makes this prediction is because the days of having a single job description are becoming extinct.

**Says Godin in an article published in Fast Company's Web site in May 2000:**

" Handling five different jobs in a single day is now common place. Which makes it rather difficult to answer the question ' What are you?'. "

"Does clinging to an occupation make you better at your job?...Does it supply an employment security blanket...or worse, do you use your title as a shield, so that when people ask you for help, you can say; 'Sorry, that's not my job'!

"I wish we had better titles: 'the one person at this company who can approve your invoice'...think how much time could be saved ...What if, instead of a job 'title', you had a job 'entitle' which came with a sticker that you could apply to projects that you'd be really good at?

"While we're at it, what is your job description? Is it a hopeful, optimistic, powerful document that gives you permission to explore new opportunities and get something done? Or is it a defensive shield that makes it easy for you to identify what's not your job?

"Chances are slim that you have just one occupation...maybe we ought to embrace the 'multipational' (more than one occupation at a time) nature of our jobs. We could pick a new, all-purpose title that signals what we're really focused on - titles such as 'customer joy specialist or change agent' ."

We conducted a survey of opinions on this issue in June 2000 at a convention of secretaries held in South Africa (The NSC organised by Audio Word and co-hosted by CAREER SUCCESS magazine). A sample of 160 delegates were asked 3 questions, and the results were as follows:

**To the question:**

"Give an actual job title (other than secretary) that you think better describes your work and responsibilities":

45 answered	PA
42	Office Manager
12	Executive Assistant
11	Management Assistant
8	Office Administrator
8	PRO
4	Admin Assistant
4	Organiser and coordinator

The balance of 26 provided an array of answers of very specific jobs such as Conference Assistant, Accounting Clerk, Travel Co-ordinator etc.

**To the question:**

"Describe what you do in a job 'entitle' manner as described by Seth Godin":

From their more comprehensive answers we found that:

Run/manage the office	featured	155 times
Make travel arrangements and bookings	"	38 times
Coordinate or manage events	"	24 times
Coordination and organising people and tasks	"	17 times
Buy stationery and order office supplies	"	14 times
Supervise others	"	12 times
Assist with budgets and accounts	"	12 times
Bookeeping	"	8 times
Manage administration	"	8 times

Other responsibilities featured were: monitor assets; maintenance of equipment; handling customers and complaints; performing executive duties in boss' absence.

**To the question:**

"Tell us which of the above you prefer":

- 98 preferred answer 1
- 71 preferred answer 2

Regarding the results to the third question, at best we expected about 20 or 30 to say they preferred the second answer, and we were quite amazed that 72 declared they would already prefer to answer in terms of what they do, rather than having a specific title. Perhaps this reinforces the point that Seth Godin makes regarding the fact that we are already multi-tasking and it is becoming more difficult to narrow ourselves down to one title.

However, the reality is that organisations today are still functioning in terms based on people's titles and that's how they draw-up organograms - although organograms are regularly changing. And this is the way things will stay for another couple of years.

It is however, recommended that one also stay aware of the realities of multi-tasking and being 'multipational' so that we move forward in the right direction.

## Career Events

There are 12 events or activities that constitute or define the secretarial career. We list them, but the way we sequence them is not necessarily the way it will happen for everybody in this career.

### 6.1 Obtaining entry-level qualifications

The first major event for all those who wish to embark on this career is getting a good qualification. In some countries there are National Qualification Frameworks in place, and it is recommended that the course attended is recognised by an official body, whether at national level or international level.

Having a recognised diploma opens doors quicker for employment and enhances chances for promotion later on. Equally, with globalisation being a fact of life, and one being faced with the possibility of having to work in another country, it helps to have a recognised course.

### 6.2 Getting a job

Nothing equals the thrill of getting and starting a first job. Some people say that the first job will determine how successful the career will be. This is not necessarily true! There are people who have had a discouraging start in terms of the first company not offering ideal conditions or pay, and yet they went on to better prospects.

The key principle is to make everything one can out of that first job; learn as much as possible about the work itself, about people and teams; get experience and then move on to bigger and better opportunities - either in the same company or in other companies.

### 6.3 Doing courses

In some companies there are budgets in place for staff to attend courses, either in-house or at colleges/institutes. Where there aren't predetermined budgets in place, people have to apply for payment of their courses; and where companies do not support their staff financially in upgrading their skills, people have to pay for themselves if they wish to further their knowledge or qualifications.

Courses range from full-time short-courses to part-time short-courses and part-time long-courses. There are also distance-learning/correspondence courses for those who cannot attend classes for various reasons. E-learning is taking off and courses on the Net will be an option too.

#### Courses cover either:

- technical skills.
- office work/administrative skills.
- management skills.
- specialised fields: finance; HR; marketing, legal.
- academic subjects such as psychology and industrial psychology.

#### Attending conferences

As above, companies may have budgets in place or the facility of applying for subsidised attendance, or not. Attending conferences and workshops is advisable as they are normally 1 to 3 day events and jam-pack useful information alongside recharging the motivation batteries. Those fortunate to attend events such as these remain more loyal to the profession and to the company that sponsors them.

It is also very useful for one's career to collect a number of attendance certificates, because they are useful for credit-building in terms of certification (whether for credits or points determined by a National Qualifications Framework or an international one such as CPS®) and enhancing chances for promotion.

### 6.4 Getting certified as a professional

There are Institutes that offer syllabi and examination facilities for secretaries and administration professionals. It is important to find out which ones do in the country one resides or works in. Study can be done full-time or correspondence through one of the colleges that are registered with the Institute.

The international certification option is also very attractive and CPS® offered by IAAP is one such example. We refer you to Chapter 7 for the details.

The value of certification is not only for your professional recognition but should have material rewards in terms of salary and promotion prospects.

### **6.5 Belonging to an Association**

Lawyers, doctors, nurses, dentists, accountants, architects and so forth, belong to a Council and/or are registered practitioners with an official body. The secretarial/administration profession does not have a Council which regulates the profession and offers registration.

The closest organisations to a Council are Associations, Federations or bodies such as the IAAP, the IQPS or EUMA.

Most countries have an association, and we refer you to Part 3, Chapter 2 for an international list of associations.

The benefits of belonging to an association are that you network with your peers, you attend events of direct relevance to your development, and keep abreast of trends. Your membership fee should be subsidised by your employer as it is membership to a professional body. Belonging to an association also positions you as someone who is serious about your career, rather than just viewing it as a 9-5 job.

### **6.6 In-house Forums**

Starting a Forum takes a lot of initiative and courage - and preparation.

A forum runs similarly to an independent association in that it has a constitution, a committee, an annual programme of events, notices to members and regular attendees.

It fulfils an important role as it brings people, that normally may not meet, together to exchange ideas, techniques and procedures. Some forums concentrate on information and education whereas others go further and play an integral role in operations manuals for secretaries, performance appraisal criteria, and career-pathing procedures.

Depending on the leadership, these forums are excellent bodies for mentoring and for continued motivation; it does require careful organisation; fairness and transparency from the committee and support from management to allow their secretaries

to attend the events - which are at breakfast times or extended lunch-hours.

Belonging to a forum if there is one in the company one works for, is a way of getting to know who's who, what's what much quicker. It is also, a way of showing an interest in one's job and career.

### **6.7 Receiving own professional magazine**

In some cases, association membership automatically offers subscription to a magazine or journal. In South Africa, for example, belonging to The PSA entitles you to a monthly edition of CAREER SUCCESS, the magazine for Secretaries and Office Managers.

Getting one's own magazine is a status symbol in one way, but quite a professional investment in another. The advantages of receiving a regular publication are that the content ensures that you are continually motivated and educated. Articles provide office know-how expertise and furthermore, you get to know about services and products that impact on your efficiency and productivity.

In the case of those who want a magazine but cannot belong to an association, the subscription fee should be subsidised by the employer.

An issue raised by Secretaries is the fact that they have to share their copy with 3 or 5 colleagues, and the complaint is that by the time the last reader gets the magazine most of the promotions or events have passed. A professional magazine or journal is not a business or financial news publication; it is actually a self-help tool - as such it is very difficult and contra-productive to share. When one needs to read up on something again to refresh one's skills, it's complicated to keep running to the subscriber's cupboard to pull out the relevant edition. Employers need to understand that getting each Secretary her own copy will benefit management directly.

### **6.8 Mentoring**

Being mentored in the earlier part of one's career, and then becoming a mentor too at a later stage, are two very significant events. Mentoring is increasingly recognised as one of the strongest processes for professional growth, and it is an honour and a privilege for both mentor and the mentee.

*Debbie Abrahams, National President of South Africa's Association for Secretaries and Office Professionals provides a few pointers on mentoring:*

**The qualities of a successful mentor:**

- Has relevant work experience and knowledge
- Has experience in the industry
- Has good interpersonal skills
- Is respected by others
- Is capable of coaching
- Is compatible with the mentee
- Is patient and amenable

**The responsibilities of a mentor:**

- To provide resources and opportunities for development
- To help mentees set achievable goals
- To be a role model
- To assist mentee in problem solving
- To provide support and motivation

**6.9 Being promoted**

Akin to getting one's first job - a promotion is an adrenalin rush, a public pat on the back for a job well done.

Every promotion is a career event as it takes you a rung higher and increases your status professionally and socially. Last but not least, the financial reward that comes with the promotion is the material proof that you are an asset to the company and to the profession.

A positive spin-off of a promotion is increased visibility, which is good for the profession. The 21st Century Secretary is far more at the forefront of events and customer-liaison than before, and the more this visibility is acknowledged the better.

Promotions, as said in Appendix 2 Part 4 - Career Strata, should be on merit and not linked to the manager's promotion. Nothing could be more offensive and ludicrous than for anyone to go a notch higher because one's boss has been promoted! That is a reflection on the boss and not on one's own merit, and the argument that it's because of one's contribution to the boss' success is not good enough.

**6.10 Winning an award**

Whether in-house or public, winning an award is the ultimate accolade.

Awards are bench-marks of excellence, efficiency and initiative, and therefore serve to reinforce or change standards for the profession.

Besides feedback from management, a competition acts as a measuring tool for where one stands vis-à-vis one's peers and contemporaries.

There are secretaries that enter competitions a few years ahead of when they'd like to win, in order to start assessing themselves regarding their general work proficiency, problem-solving skills, prioritisation and even public-speaking skills - the results reveal where they can improve and eventually walk off with the trophy.

More information on awards in Part 2 Chapter 10.

**6.11 Secretaries Day & Week**

A National Secretaries Day exists in many countries, and in the US there is even a week dedicated to the profession. We read, however, that in the US it's now called Administrative Professionals Day and Administrative Professionals Week.

*Says the IAAP:*

"The International Association of Administrative Professionals (IAAP) made the change to more accurately reflect the organization's scope and the administrative professional's evolving and diverse role within the office.

There are an estimated 5 million secretaries, administrative assistants, office managers, information coordinators, clerical staff and administrative managers in the United States, according to the U.S. Bureau of Labor Statistics, and the number of jobs in the administrative profession is expected to grow by more than 500,000 or 10 percent in the next 10 years."

In many other countries, however, it's still known by the traditional title, but a move towards a more modern one will eventually happen. The day is celebrated in various ways:

A national banquet lunch, or a conference, or an expo, or going down to a restaurant with management, or receiving flowers, a card or a gift.

The benefits to the profession are that the workplace is compelled to think about and focus on the relevance of this important team-member - even if only for a day a year.

**6.12 Research & Surveys**

Every research exercise and survey conducted on the profession works towards the better understanding of its profile.

In South Africa, CAREER SUCCESS magazine conducts surveys and in the most recent one conducted at the National Secretaries Convention by Audio Word and Mbizo educational events. The discoveries about secretaries lifestyles revealed that:

**Total household income**

Up to R3000	15%
R3001 - R5000	27%
R5001 - R8000	29%
Over R8000	29%

**Age Bracket**

20-25	6%
26-30	22%
31-40	38%
41-50	29%
50+	5%

**Marital Status**

Married	53%
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Unmarried	35%
Divorced/Widowed	12%

**How buying decisions are made**

Mainly self only	48%
Mainly spouse	5%
Jointly	47%

**Hobbies**

Crocheting	1%
Knitting	2%
Cooking	15%
Entertaining	6%
Interior Décor	2%
Flower Arranging	5%
Gardening	4%
Sport/Outdoor	16%
Soccer	1%
Netball	3%
Tennis	3%
Pool	4%
Walking	6%
Hiking	2%
Gym	4%
Swimming	3%
Horse Riding	1%

*From IAAP we quote two surveys which were released by Avery Dennison.*  
[www.iaap-hq.org](http://www.iaap-hq.org)

**Administrative Professionals Week/Day 2000**  
 The official theme is  
 "Celebrate Administrative Professionals Week in 2000."  
[Home](#) | [About IAAP](#) | [CPS](#) | [Join IAAP](#) | [IAAP Events](#) | [Back to APW/APD Index](#)

*Avery Dennison Administrative Professionals Week Survey National Survey Reveals 25% Of Americans Believe Loyalty Is Everything*  
 LOS ANGELES (April 18, 2000) - A survey released by Avery Dennison reveals that administrative assistants are leaving behind last century's stereotypes as they approach the first week honouring them in the new millennium - Administrative Professionals Week, April 23-29.

As of 2000, the 48-year-old annual observance of Professional Secretaries Week is now Administrative Professionals Week, with Administrative Professionals Day on Wed., April 26.

The International Association of Administrative Professionals (IAAP) made the change to more accurately reflect the organization's scope and the administrative professional's evolving and diverse role within the office.

There are an estimated 5 million secretaries, administrative assistants, office managers, information coordinators, clerical staff and administrative managers in the United States, according to the U.S. Bureau of Labor Statistics, and the number of jobs in the administrative profession is expected to grow by more than 500,000 or 10 percent in the next 10 years.

**Loyalty is Everything:** According to the IAAP, the role of a secretary arose from the need for a person to whom confidential matters could be entrusted. This need still rings true. When asked what is the most important quality for today's Administrative Assistant, being loyal and trustworthy was rated number one by a quarter (25%) of Americans in the Avery Dennison survey.

**Maintaining a professional attitude was number two:** With 20 percent of responses. Roughly equal proportions feel that juggling multiple tasks at one time (13%) and remaining calm under pressure (12%) are the most important quality.

**Changes in the Role - How They Are Viewed**  
 The Avery survey also reveals that:  
 • More than one in three Americans (36%) believe

that the biggest difference between the Administrative Professional of today and the Secretary of yesteryear is that they now have more responsibility in the office.

- In addition to the increase in responsibilities, nearly one-fifth (18%) believe the major difference is that Administrative Professionals are now jacks of all trades.
- Slightly fewer (16%) see the difference as increasing tech savvy.
- More than one-tenth (11%) think the biggest difference is the enhanced career path of Administrative Professionals.

"We recognize the challenges presented by today's office environment," said Teri Lim, customer and consumer communications manager for Avery Dennison Office Products, a global leader in the industry. "Avery Dennison has evolved too, offering the latest solutions to help make office jobs run more smoothly. We actively support the IAAP and its goals to help Administrative Professionals enhance their skills," Lim said.

#### **Organization is Key**

Tasks for Secretaries of the past included getting coffee for the boss, taking dictation and organizing files.

- Now more than two in five people (41%) think the most important skill an Administrative Assistant can have is the ability to master the latest software to organize data and work efficiently.
- Keeping managers organized is seen as the most important skill by more than one-third (34%) of respondents.
- About one-tenth (11%) think the ability to use the Internet as a resource is most important.
- Not surprisingly, the time-honored tradition of making coffee for the boss is seen as important to only a few (3%).

#### **Love-Hate Relationship**

The survey also indicates that many Americans appear to have a "love-hate" relationship with emerging technology. Today's office relies more and more on computers and other technology to get work done.

- While half of respondents (51%) agree that this makes an administrative assistant's job easier because technology improves efficiency, nearly one-third (31%) believe that technology makes jobs harder because there is constant learning required to keep pace with the changes.

"For example, having the software to prepare labels and manage mailing lists has made our jobs much easier," said Cynthia Lively CPS®, IAAP International President. "However, we now have the additional challenge of mastering the software to run these programs. Fortunately IAAP and Avery Dennison share the philosophy of continued learning in the workplace. This has helped our profession to evolve and grow."

*The Avery Dennison Administrative Professionals Week survey was conducted in March 2000 by Yankelovich Partners, surveying 1,023 Americans age 18 and older. For complete survey results and more information, visit the Avery Dennison Office Products Web site: <http://www.avery.com>. The survey findings and additional information regarding Administrative Professionals Week are also available on the IAAP Web site, [www.iaap-hq.org](http://www.iaap-hq.org).*

*Avery Dennison Worldwide Office Products is the world's leading manufacturer of self-adhesive labels for laser and ink jet printers, labeling software, binders, sheet protectors, index and tab dividers and other office-, home- and school-related supplies. Avery Dennison Worldwide Office Products, a business unit of Avery Dennison Corporation, is based in Brea, Calif. For more information about AVERY-brand products, consumers can visit the Avery Dennison Worldwide Office Products Web site at [www.avery.com](http://www.avery.com)*

*Avery Dennison and Avery are trademarks of Avery Dennison Corporation.*

*Administrative Professionals Week and Administrative Professionals Day are registered trademarks of the International Association of Administrative Professionals.*

**Two years previously, in 1998, AVERY U.S. had conducted another survey:**

**Avery Salute to Success**

First-ever "Avery salute to success" survey reveals that today's secretary prefers a personal thank you over money as recognition during professional secretaries week

— Survey Results Released in Conjunction with Activities Honoring America's 3.4 Million Secretaries the Week of April 20 —

DIAMOND BAR, Calif. (April 6, 1998) - Shedding new light on the secretarial profession, the first-ever "Avery Salute to Success" poll released today for Professional Secretaries Week® reveals that America's 3.4 million\* Secretaries and Administrative Assistants prefer a simple "thank you" to money as recognition from their supervisor.

"It really is the thought that counts when it comes to recognizing a Secretary or Administrative Assistant for Professional Secretaries Week," said Susan Skarness, 1997/98 International Secretary of the Year® as awarded by Professional Secretaries International® - The Association for Office Professionals™. "These findings show how easy it is to recognize your secretary or administrative assistant, which is important to do throughout the course of the year."

The "Avery Salute to Success" survey was commissioned by global office products leader Avery Dennison in recognition of Professional Secretaries Week, April 20 - 24, and Professional Secretaries Day®, Wednesday, April 22. The independent national survey of 500 Administrative Assistants and secretaries reflects opinions on issues important to them in today's workplace.

- Source: U.S. Department of Labor

Celebrating Professional Secretaries Week

**Following are some of the ways office professionals like to be recognized during the week, as ranked by Administrative Assistants:**

- A personal "thank you" 94%
- An extra day off for a job well done 80%
- A gift certificate from a favorite department store 74%
- Cash 67%
- Dinner for two at a favorite restaurant 60%

- A weekend getaway for two 56%
- Stock or profit sharing 46%

**Today's Standards for Success**

The "Avery Salute to Success" survey demonstrates that today's Office Professionals have raised the bar on the standards of success for the profession. Following is a look at the top 10 attributes today's Office Professionals need to possess in order to succeed in the '90s, as ranked by Administrative Assistants:

- 1) Remain calm under pressure (96%)
- 2) Effectively manage multiple tasks (94%)
- 3) Juggle responsibilities (93%)
- 4) Continually learn new skills (92%)
- 5) Be proactive (90%)
- 6) Be computer-savvy (89%)
- 7) Take charge (89%)
- 8) Rebound from interruptions (88%)
- 9) Put other people's needs first (75%)
- 10) Be a "jack of all trades" (73%)

**Secretaries Have Come A Long Way . . .**

The "Avery Salute to Success" survey shows that Office Professionals have come a long way in stature and responsibilities from the traditional "Secretary" of the past.

**According to the survey, the top three tasks for Secretaries of the past were:**

- Getting coffee for the boss;
- Taking dictation; and
- Never saying "no" to an assignment.

**Today, however, the survey reveals that Office Professionals:**

- Take a proactive role in projects;
- Wear many hats; and
- Coordinate all office details.
- Only 7 percent of Administrative Assistants get coffee for their boss.

**Today's Boss Measures Up**

The success of Office Professionals depends a great deal on their supervisors. For a better understanding of that important, yet delicate, relationship, respondents were surveyed for what they thought the "perfect" boss would be and how much their current boss resembled this profile. Today's bosses measure up well to the "Avery Salute to Success" survey's definition of the perfect boss.

**According to the "Avery Salute to Success" survey, the perfect boss is one who:**

- Trusts the judgment of their assistant (97%)
- Knows the assistant has a life (88%)
- Takes responsibility for their own mistakes (88%)
- Says "thank you" frequently (78%)
- Is a mentor (74%)
- Doesn't hand off work 10 minutes before quitting time (63%)

**According to respondents, their bosses:**

- Trust their assistant's judgment (81%)
- Know that their assistant has a life (74%)
- Say "thank you" frequently (62%)
- Take responsibility for their own mistakes (60%)
- Are mentors (56%)
- Don't hand off work 10 minutes before quitting time (54%)

"Avery Dennison commissioned the 'Avery Salute to Success' survey to provide a forum for administrative assistants to speak out about their changing role within today's workplace," said Lori Hall, group promotions manager, Avery Dennison Worldwide Office Products. "Respect and recognition are issues we heard coming through loud and clear. Of the administrative assistants surveyed, 87 percent said they are respected as professionals."

Respondents were selected randomly from a national sample of office professionals in major metropolitan areas. CommSciences, a strategic communications research and consulting firm based in Los Angeles, conducted the survey. The survey has a margin of error of approximately plus or minus 4 percent.

In addition to the "Avery Salute to Success" survey, Avery Dennison's Professional Secretaries Week program includes hosting 735 seminars for office professionals across the country, thereby providing them with tools to help make them even more effective and efficient. In addition, Avery Dennison is widely distributing its "Celebrating Today's Office Professional" keepsake booklet, designed for and by today's office professionals to provide insight into their changing role within the workplace.

*Avery Dennison Worldwide Office Products is the world's leading manufacturer of self-adhesive labels for laser and ink jet printers, labeling software, binders, sheet protectors, index and tab dividers and other office-, home- and school-related supplies. Avery Dennison Worldwide Office Products, a business unit of Avery Dennison Corporation, is based in Diamond Bar, Calif. For more information about AVERY-brand products, consumers can visit the Avery Dennison Worldwide Office Products Web site at [www.avery.com](http://www.avery.com)*



Survey done by EUMA (European Management Assistants) in conjunction with Management Center Europe reveals the the top 20 Skills Training currently favoured:

Some of the results of the survey:

- Computer literacy/IT
- New languages
- Negotiation Skills and Contracts
- Budgets and Financial Skills
- Presentation Skills
- Communication
- Multimedia Usage
- Project Management
- Time Management
- Software Training

- Internet/HTML
- Stress Management
- Management Skills
- Coaching and Counselling Skills
- Conflict Management
- Assertiveness
- Team Building
- Written and Verbal Skills
- Cultural Awareness & Skills
- Delegation

**Contact numbers for EUMA on page 47.**

CHAPTER  
**7**

# Training

As said under Career Events, training is instrumental both for starting off on the right footing, then to ensure one is kept abreast of developments and new skills, to cross-skill, but also to advance in one’s career.

## 7.1 Formal and informal training

There are nine types of training, some in the form of formal training (code F) and others informal (see code I):

- Full time courses - F
- Part-time courses - F
- Distance learning/correspondence - F
- Mentoring/coaching - I
- In-house training provided by employer - F
- On-the-job training - I
- Self-Study - I
- e-learning - F
- Short-duration: Seminars/workshops/conferences - F

There are four levels of qualifications that can be achieved:

- Certificates
- Diplomas
- Institute Certification
- Degrees

The Certificate and Diploma courses are offered by a number of colleges and the difference between the two is normally based on 2 factors:

- A Certificate is for one subject only or for a number of subjects in a 3-6 months course.
- A Diploma is for a more comprehensive course with the possible duration of 1 - 3 years.

Institute Certification is a prestigious qualification as the examining body is independent from the college where the lectures took place.

The CPS® qualification is one such example.

## 7.2 CPS® (Certified Professional Secretary)

“In today’s competitive environment it is important to have employees who are well educated, can adapt to change and initiate change. To earn the CPS® rating, secretaries’ have to study a wide variety of material and gain a broader education. This equips them to effectively handle a bigger array of problems, to initiate change and to develop innovative ideas.” **Dave Pypilow, Director of Employee Relations Hallmark Cards, Inc.**  
(See page 33)



*“If you have built castles in the air,  
Your work need not be lost;  
That is where they should be.  
Now put the foundations  
under them.”*

*Source: Henry David Thoreau*

- **What is the CPS® rating?**  
This is currently considered the highest qualification in the secretarial profession and is accepted worldwide. It is the achievement of the internationally recognized standard of proficiency as a professional secretary. It is achieved through a self-study program and by passing a three part, one-day examination.
- **Why earn the CPS® rating?**  
In today's workplace, having the CPS® credentials can be an assurance of employability.  
  
Among the rewards for achieving this rating, many of the 52 000 worldwide CPS® holders reported pride in accomplishment, increased self esteem, greater respect from employers and peers as well as an opportunity for advancement.
- **More Detail on CPS®**
  - Three part examination: Finance and Business Law; Office Systems and Administration; and Management.
  - Examination is written twice a year worldwide (maximum of 3 years to complete).
- Eligibility for examination: employed full time; work experience; students and business educators
- Preparations for the examination: self study via recommended workbooks and tutors.
- CPS® is administered by the Institute for Certification (IC), a department of International Association of Administrative Professionals (IAAP).
- **CPS® Accreditation**  
You will need to use recommended text books as stipulated by The PSA - The Association for Secretaries and Office Professionals.
- **CPS® Recertification**  
All CPS® Holders are required to recertify every 5 years. This recertification is a way of validating your professionalism throughout your career. Education and the CPS® rating continue to go hand-in-hand. 120 points must be accumulated within the five year period. Any recertification component that has been accredited with the above CPS® emblem, is recognised.  
  
For more information visit the Web site [www.officedigest.com/psa/cps](http://www.officedigest.com/psa/cps).

Getting a degree is the ultimate achievement, and the fact that degree qualifications are available in some parts of the world, including South Africa, is the ultimate accolade for the profession. The degrees are Bachelors, Masters and Doctorate.

Degrees also mean that lecturers and teachers of secretarial and office administration studies can upgrade their qualifications and enhance the status of these departments within the institutions where they exist.

An interesting note is that one of the committee members of the first edition of The Blueprint, Esther Hoffman, has since then obtained her doctorate. Her thesis was on the tele-office and the virtual office.

**7.3 Need for continual learning:**

The fundamental reason for the need for continual learning is that the world paradigm has shifted from seeing learning as starting at school age and ending on completion of second or tertiary education, to a lifelong learning process. This mind shift

has happened hand in hand with the pace of change and the advance in technology.

The issue is that professional survival is going to depend on both a need for formal education as well as continual personal development.

**The benefits of continual learning:**

- Increased knowledge and confidence.
- Maturity and wisdom.
- Self-realisation and self-esteem.
- Financial rewards.
- Career growth, status and power.

To assist in maintaining a good learning curve, one should form good networks to support you in the learning process.

- Consult your co-workers/peers.
- Join associations and clubs.
- Consult people you admire in your community, your friends and family.
- Consult experts.
- Make use of mentoring.

*We asked two senior personnel, J L Pretorius and M Clark, at the School of Administration of the Technikon Witwatersrand in South Africa to add their views:*

In the past the Secretaries tend to have had better survival skills than their Managers in the downsizing, mergers and acquisitions of business and survived the flattening of the managerial hierarchies. The quest today is to develop knowledge workers that create, interpret, analyse and utilise information by making use of technology. This moves away from secretarial employees that uses the information systems to make routine entries, record, store and transmit the required data or information.

Today a single job description seems to become extinct because in the past jobs discouraged accountability for they reward people, not for getting the necessary work done, but for "doing their jobs".

The traditional occupations need to be adapted to the changes that takes place in the fast-moving, knowledge, information and communication technology-based economy. This means that careers will have to be reconceptualized and career development will have to be reinvented. In future a person could be hired and assigned to a project. The work to be done will come from the changing demands of the projects. This will demand a package of capabilities that can be utilized in different project based situations.

**Qualification will also have to change. The new qualifications should focus on:**

- The work you desire to do
- The necessary skills the work requires
- The temperament to do the work
- Other resources the work requires.

**Legislation to make provision for change have been passed:**

- All qualifications will now fall under the auspices of SAQA, being formal degrees or certification.
- Learning will have to take place in unit standards that acknowledges all prior learning. It should be possible to assess the level of learning as indicated in the NQF.
- The learner should be guided by unit standards with specific outcomes. The learner should know the assessment criteria of the unit standards. This will help the learner to know what evidence is required, should the evidence be in performance or knowledge?
- A workplace assessor should be able to assess in the workplace the standard of learning of the employees.

- The workplace should be committed to the empowerment of the employee. Today the right of training is incorporated in the Bill of Rights that establish principles and mechanisms to ensure that there is career pathing for all.
- Strategies should be developed that ensure the programmes are:
  - Sensitive to the specific needs of each community, particularly with regard to the needs of women, youth, rural people and the disabled.
  - Redress deprivations and imbalances between and within different communities.

Organisations should also play a more assertive role in uplifting the skills of the learners in developing a highly skilled workforce by:

- Creating a climate within the organisation that is conducive to change.
- Aligning government policies and legislation with the organisation's own human resources policies on training and development.
- Aligning the training and development with the NQF to ensure recognised units of standard and transferability of skills.
- Embracing a culture of continuous learning which will effect the ways of rewarding the competency based performance of employees.
- Integrating all training and development initiatives on a flexible and cost-effective basis that would eliminate the duplication of learning facilities and programmes where they exist.
- Creating a culture of transformation that would address the needs of the previously disadvantaged groups.

Technology requires that we assume new activities in managing effectively the flow of information and the knowledge reservoirs, which are necessary to process a quick answer to the uncertainty and dynamism of the technological evolution. Some think that the use of information technology and automation may eliminate the need for person-to-person interaction. In reality the whole purpose of inter-business networking is to increase opportunities for suppliers and customer interaction.

The role of the service providers will also change in becoming partners in leading learners to multi-skilling pathways and giving accreditation for prior learning. This could lead a learner from receiving a diploma, an associated degree and further research degrees from various service providers.

# Codes of Conduct

A professional always conducts himself or herself in a manner which dignifies the profession (s)he represents. Many professions have Codes of Conduct which stipulate the comportment expected.

**In this Blueprint edition, we reproduce the:**

- ❑ Code of Conduct for a Professional Secretary published in the first edition of The Blueprint;

- ❑ The IAAP Code of Ethics for Administrative Professionals; as well as a
- ❑ Code of Conduct for a Professional Secretary attending events, written by a panel of experts in the CAREER SUCCESS magazine team and published in the Secretaries and Office Managers A-Z Desktop Guide - 1998 edition.

## CODE OF CONDUCT FOR A PROFESSIONAL SECRETARY

### 1. Introduction

This code of conduct sets standards and guidelines for the practice of the secretarial profession.

In essence, it aims to ensure that the members of this profession conduct themselves with dignity and integrity, and that they strive to improve their own competence and proficiency as well as those of their peers.

### 2. Towards employer

- Is expected to be ethical and safeguard confidentiality with respect to sensitive information regarding products services and activities.
- Is expected to be ethical and respect confidentiality regarding information on other personnel.
- Is expected to be ethical, and respect confidentiality regarding own departments work if questioned by colleagues or outsiders.
- Is expected to be honest when requesting any leave other than when taking credited annual leave.
- Is expected to adhere to all of the employing organisation's procedures, practises, rules and regulations.
- Is expected to be punctual and productive every workday.
- Is expected to adhere to company dress code.
- Is expected to have the right skills and attributes for the position and if not, to inform employer of the need for necessary further training.
- Is to conduct herself/himself at all times in an orderly and lawful manner.
- Is expected to treat the property and resources/equipment of employer with due care, regard and respect. These must also be used honestly and not to own benefit.
- Full loyalty to employer is expected - should report any untoward behaviour of colleagues or clients that could impact on own integrity or on the integrity and well-being of the employer.
- Is expected not to indulge in any unruly work practises, nor to incite other workers to

such behaviour.

- Is expected to behave appropriately at public functions and events organised by the employer.
- On deciding to terminate service, should do so by fulfilling administrative requirements and leaving with dignity.

### 3. Towards own manager/supervisor

- Is expected to carry out all lawful and reasonable instructions given by Manager, in a proper loyal and efficient manner according to the organisation's work practises and rules.
- Is expected to treat all Supervisors and Managers with loyalty and respect.

### 4. Towards co-workers

- Is expected to treat all co-workers with respect.
- Is expected not to use obscene language or gestures while at work.
- Is expected not to threaten co-workers, directly or indirectly, if they do not fulfil expectations.

### 5. Towards clients

- Is expected to treat all clients and suppliers with respect and integrity.
- Is expected to be ethical in client dealings.
- Is expected to maintain the mutual goodwill that exists between the employer and client or supplier.
- Is expected to be cordial in all dealings and circumstances with clients or suppliers.

### 6. Towards peers in the same profession

- Is expected to set an example to other Secretaries regarding a Professional Secretary's comportment.
- Is expected to be an example to personnel in other professions regarding a Professional Secretary's comportment.
- Is expected to assist, unbegrudgingly, any other Secretary who asks for help, assistance or advice.

## CODE OF ETHICS FOR ADMINISTRATIVE PROFESSIONALS

*(Preface note: The International Association of Administrative Professionals® defines an Administrative Professional as “an individual who possesses a mastery of office skills, demonstrates the ability to assume responsibility without direct supervision, exercises initiative and judgment, and makes decisions within the scope of assigned authority.”)*

Recognizing that a position of trust imposes ethical obligations upon Administrative Assistants, Office Coordinators, Executive Secretaries and other types of Administrative Professionals to act for benefit of employers, clients, and the public, members of Professional Secretaries International, now known as the International Association of Administrative Professionals (IAAP) established and promulgated four standards of professional conduct and resolve to be guided by them as embodying the ethical ideals of their profession.

The development of a Code of Ethics demonstrates that the

administrative support profession accepts the obligation to engage in self-discipline and accepts the responsibility and trust earned by administrative professionals throughout past generations.

Each Administrative Professional has a personal obligation to support and follow the Code, recognizing that the greatest penalty possible for its violation is loss of the respect of professional colleagues and the trust of employers, clients, and society.

Ethical behavior is encouraged by both the Code and the profession. An Administrative Professional’s personal ethical behavior may often exceed the requirements of the Code, which do not demand less than the law, and often exceed those of the law. Persons found guilty of violating laws will be considered in prima facie violation of the Code and may be censured or otherwise penalised by the association or profession.

**1. The Administrative Professional shall act as a trusted agent in professional relations, implementing responsibilities in the most competent manner and exercising knowledge and skill to promote the interests of the immediate and corporate employer.**

The immediate employer shall be considered to be the person or persons who, by an established and predetermined arrangement, receive directly the agreed upon services of the Administrative Professional. The corporate employer shall be considered the entity (company or organization) providing the Administrative Professional’s compensation. In cases where the immediate employer does not provide compensation for the Administrative Professional, the Administrative Professional’s principal obligation shall be to serve the corporate employer. In serving the immediate employer, however, the Administrative Professional shall not act contrary to interests of the corporate employer or to public safety and welfare or in such a way as to impair the dignity and status of the profession.

The Administrative Professional shall strive to avoid conflicts of interest with the immediate employer whenever possible, but if such conflicts cannot be avoided or resolved, the Administrative Professional shall fully disclose to the immediate employer and all interested parties the relevant reasons and circumstances.

Communications and information either given in confidence or such that confidentiality is required to serve the best interests of the immediate employer shall not be revealed by an Administrative

Professional unless permission to do so is granted by the immediate employer or continued confidentiality is harmful to the corporate employer, client, public, or profession.

Testimony in a court of law regarding confidential matters should be given only under the immediate or corporate employer’s authorisation, under legal compulsion, or to protect the public from harm.

The Administrative Professional will assume responsibilities only when qualified by training and experience and shall inform the immediate or corporate employer concerning any lack of qualification which might harm the interests of the employer or impair the Administrative Professional’s capacity to serve such interests.

In acting as agent for an immediate employer, the administrative professional shall strive to accurately and honestly represent the views and interests of the immediate employer as well as the views and interests of those who seek to contact or influence the immediate employer, and shall not distort or misrepresent such views and interests, whether for personal advantage or to protect the employer from unwelcome information.

The Administrative Professional shall respond to those seeking the immediate employer’s professional attention with impartial courtesy and consistent good will, recognising that by the Administrative Professional’s demeanor the immediate employer will be judged.

When entrusted with funds or material goods essential to serve the employer, an administrative professional shall never appropriate or use such funds or goods for personal or non-professional purposes, and an Administrative Professional shall never use the employer's facilities or time for the pursuit of such purposes without the express consent of the immediate employer.

The Administrative Professional shall not accept outside employment or accept any form of compensation from outside sources which would impair the efficiency and effectiveness of the Administrative Professional or which would be in conflict with the employer's welfare.

**2. The Administrative Professional shall strive to maintain and enhance the dignity, status, competence, and standards of the profession and its practitioners.**

The Administrative Professional, when applying for or being listed for employment, shall not make exaggerated, misleading, or false claims concerning training or qualifications. When judging the qualifications of other persons, whether in providing references, assisting with assignments, or evaluating performances, the Administrative Professional shall strive to provide fair and objective appraisals and shall attempt to avoid any false, malicious, or indiscriminate injury to or criticism of the professional reputation or work of others.

The Administrative Professional will cooperate with other Administrative Professionals in extending public knowledge and appreciation of the profession and its achievements and will strive to protect it from misrepresentation and misunderstanding. The Administrative Professional shall strive to improve the standards of the profession by belonging to a professional association, attending and encouraging others to attend professional meetings, exchanging knowledge and information with other administrative professionals, and by achieving and encouraging others to achieve the Certified Professional Secretary® rating.

**3. The Administrative Professional shall insist that judgments concerning continued employment, compensation, and promotion be based upon professional knowledge, ability, experience, and performance.**

The Administrative Professional shall strive to improve working conditions and to ensure equal

employment opportunities within the profession and throughout the organisation by which employed.

The Administrative Professional shall refuse to cooperate with or condone by silence the actions of coworkers or employers who misuse their positions for personal, non-professional advantage.

The Administrative Professional shall resist, and if necessary report to the proper authorities, instances in the workplace of harassment for reasons of sex, creed, race, or age.

The Administrative Professional shall inform the employer concerning any changes in conditions of employment, including fringe benefits, which encourage inefficiency or make difficult the proper performance of prescribed assignments.

**4. The Administrative Professional must consider the promotion and preservation of the safety and welfare of the public to be of paramount duty.**

The Administrative Professional, in addition to sharing with all concerned citizens an obligation to promote the general welfare and safety, has a special obligation to cooperate with and promote the interests of other allied professions and to exercise particular concern for those directly affected by the actions of employers served.

If requested or required by an employer to engage in or passively condone activities which are contrary to the public safety or welfare, the administrative professional shall indicate clearly to the employer the possible harmful consequences and, if such activities continue, the Administrative Professional must either resign or notify the proper authorities.

The Administrative Professional is obliged, before reporting to the proper authorities actions contrary to the public interest, to determine that the factual evidence is correct, to be motivated by no desire for personal benefit or vindication, and to inform the employer of such an intention unless doing so will be harmful to the public.

(Adopted July 1980 and amended August 1998 by action of Professional Secretaries International, now known as the International Association of Administrative Professionals.)

## CODE OF CONDUCT FOR A PROFESSIONAL SECRETARY ATTENDING EVENTS

This Code of Conduct sets standards and guidelines for the Office Professional who attends events such as seminars, conferences, launches and all corporate events.

In essence, it aims to ensure that the members of this profession conduct themselves with decorum and integrity, and dignify their role as ambassadors of their company. It also incorporates guidelines on courtesy and protocol before leaving for an event, and upon return.

### 1. Towards the employer

Before you leave:

- Motivate your request to attend any function by stipulating the needs, and benefits of attending, both for yourself as a professional and for the organisation as a whole.
- Ensure that you leave relevant people informed on how to contact you during your absence, and that those responsible for doing any aspects of your work have been left clear briefs on procedures and systems.

At the event:

- Respect the need to safeguard confidentiality of sensitive information regarding products, services and activities, when networking with personnel from other companies.
- Be ethical and respect confidentiality regarding information on superiors and colleagues.
- Adhere to the programme and fulfil obligations as per your stated motivation to attend.
- Be appropriately groomed, whether in corporate uniform or own attire, for the various activities that the programme has set.
- Exercise the right skills and attributes if, and when, you're on duty.
- Treat resources/equipment of employer with due care, if these are taken to the event.
- Conduct yourself in an orderly and lawful manner as you are an ambassador of your company, and not at the function in your private capacity.
- Do not indulge in, or incite, unruly behaviour that could reflect poorly on the reputation of your employer.

On your return:

- Provide feedback in verbal or written format. Ditto towards your colleagues who did not

attend and will benefit from getting notes from you.

- As a token of loyalty to your employer, you may consider reporting any untoward behaviour of colleagues who attended the event, if you believe it was seriously detrimental to the reputation of your company.
- Thank all concerned for the opportunity you were afforded, and thank the team who held the fort during your absence.

### 2. Towards superiors and colleagues attending the same event

- Do carry out the team's obligations in a professional and obliging manner, as you are in public view.
- Handle any disagreements or conflict that may arise, privately and out of public view.
- Treat superiors and colleagues with respect and loyalty.
- Address diplomatically and sensitively poor behaviour from any team member who appears to disrespect this Code of Conduct. It is important to point out the impact of behaviour on the reputation of your company, or on the morale of colleagues who were left behind in favour of this staff member attending.
- Consciously contribute to good camaraderie by exercising sound interpersonal skills.

### 3. Towards VIPs, clients, stakeholders and suppliers at the event

- Treat all with respect and integrity, and maintain the spirit of goodwill.
- Be ethical, and cordial, in your communication and dealings with them.
- In case of VIPs ensure you respect, and follow protocol procedures.
- Do not remove any assets or decorative items, such as floral centrepieces, from the venue, unless otherwise announced by an MC. Although you may mean no harm, the client or supplier will be affected by the loss.

### 4. Towards peers attending the same event. As a custodian of this profession

- Set an example to other secretaries regarding a Professional Secretary's comportment.

- Be willing to assist any other secretary who asks you for assistance or advice; and when necessary offer assistance (without being obtrusive) to a peer who looks lost but seems shy to ask for help.
- Respect the different levels of proficiency among your peers, and seek to mentor for self-improvement. Avoid being judgmental.
- Respect the cultural diversity among all incumbents of the profession. Practise tolerance of the differences and cultivate a spirit of harmony by encouraging mutual cultural knowledge.
- Exchange views and techniques with others, so that your experience of the event is further enriched by peer-to-peer learning.
- Remember that your peers often ask where you work, before they ask your name. This reveals the importance with which your place of work is viewed; use this opportunity to do goodwill marketing of your employer.
- Realise that any form of overindulgence (drink etc.) will reflect poorly on your professionalism and on your employer.
- Promote the profession, and stimulate pride in it, to the junior incumbents.

**5. Towards the MC, speakers and presenters**

- When asking a question ensure that it is brief and to the point, and that you speak audibly.
- Try not to ask too many questions, thus eroding on the time available to others.
- Refrain from talking to 'neighbours' when someone is presenting.
- Refrain from leaving the room during proceedings, as it is disruptive for the presenter.
- Ensure that your cell telephone is switched off during proceedings.
- Exchange views with speakers/presenters but do not expect them to dedicate their free time to resolve a problem particular to your circumstances. Contact or contract them after the event.

**6. Towards the organisers and hosts of the event**

- Before you leave for the event, read all correspondence you've been sent, and familiarise yourself with as many aspects as possible. Ensure you communicate, ahead of time, special dietary requirements, and if sharing accommodation,

indicate smoking or non-smoking preference.

- If delegate briefs are not provided at registration, or these do not provide the necessary information, it is your prerogative to request that appropriate and timely systems of information be provided.
- If daily updates are handed out, it is your responsibility to make time to read them, whether it is a programme, directions or recreation info. It is not appropriate to regularly interrupt the working team to get information on matters they have taken the trouble to issue you a brief on.
- Report to the sessions/events with all the necessary name tags/, entry tickets/ materials. These are usually handed out to you beforehand.
- Be punctual and cooperative with respect to timetables.
- When making a complaint, report the problem to the organisers, and present all the facts. Remember that organisers are also subject to being let down by suppliers, and will be grateful to any recommendations you may make. Confrontation, rumour-mongering, and making own arrangements will only worsen the original problem for everybody.
- Consider that sound planning, coupled to good contingency plans, are still no guarantee to make every participant happy all of the time.
- When important to you, request that feedback on a complaint be communicated to you, as not all problems can be resolved instantly or on site.
- Report cases of conflict or unruly behaviour and contribute to the resolution process if you can; remember that tension is easy to prevail as both the attendees and the organisers are away from their offices and comfort zone.
- Report emergencies/accidents to the nearest identified working team member. Ensure some one stays with the injured person, while you seek official help.
- Show appreciation when due, and let them know of interesting experiences and memorable moments. When appropriate, send a thank-you note to the organiser after the event.
- Ultimately, remember that you are a key ingredient in the success or failure of the event. What you put in is directly equal to what you get out.

# Temping

Temping is an option for many Secretaries and Office Administration Professionals for many reasons:

- **At the start of the career:**  
The job market may be in depression and a first job on a full-time basis may be difficult to find.
- **In-between jobs:**  
Temping can act as an interesting bridge until a suitable full-time job is found.
- **Sudden changes to one's domestic circumstances:**  
It may be difficult to go to a full time job every day, and more convenient to take on a series of projects with time in-between to be at home.
- **For tax purposes:**  
A full time job may throw the family income into a higher tax bracket.
- **For health/psychological reasons:**  
A full time job has been so stressful or the boss was a monster, and has caused the kind of emotional wear-and-tear and physical stress where temping may provide a healthy respite.
- **For personality reasons:**  
The variety of jobs and companies is best suited to the person who does not like or thrive in positions where there is a lot of routine.
- **For ad-hoc reasons:**  
For those not working or long leave to rear children, may find the need to temp for a short while to add to the family coffers to assist with a specific expense.

- **For training and experience gathering:**  
Some Secretaries have been in positions where little scope for growth has been the order of the day; the only way to move forward quickly in terms of broadening scope and skills is to be exposed to a series of companies through temping posts.
- **For saving towards travel:**  
Some candidates opt for temping in order to afford a trip overseas before their first main job. They may also pursue this temping option whilst overseas in order to prolong their stay and tour around a continent.

Earnings are determined by how many posts you get per week, as Temps are normally paid weekly.

The rate is determined by your experience/expertise but also by the position offered by the client.

## The drawbacks:

- No medical aid, but sometimes can join the Temping Group's Medical Aid.
- No Pension/Provident Fund.
- Some periods of the year can be slower or not have vacancies at all eg. December.
- Not suitable for candidates who need the stability of having a fixed place to go and fixed income needs.
- Does not qualify candidates to have sponsored attendance of seminars or conferences; sponsored subscriptions to a professional magazine or sponsored membership of an Association.

# Awards, rewards & recognition

*"In the arena of human life the honours and rewards fall to those who show their good qualities in actions" - Aristotle, Nicomachen Ethics (4th c. BC)*

## Awards and rewarding systems are instrumental in keeping people happy, and motivated.

They inspire and encourage loyalty and hard work. They are also known to increase people's pride and sense of self-worth.

### 10.1 Types of Awards

- Profession-proper
- Excellence-in-fields

- **Profession-proper**

These awards carry the profession's name and clearly aim to recognise those professionals who have excelled and will become role models for other.

**Secretary of the Year:** A "Secretary of the Year" can be organised by an association at national level; by a college or by a company as an in-house event.

One can also use a more modern title like Office Administrative Professional of the Year - but there would have to be consultation and consensus.

The jury would have to be independent and transparency in criteria and procedure is essential.

**Outstanding Secretary's Awards:** This type of award is very similar to the Secretary of the Year award, but can be given to more than one secretary a year. It recognises those who have been consistently excellent and conscientious.

- **Excellence-in-fields**

These awards are just as critical, because secretaries should be able to participate in them. Often both secretaries - and their employers - are guilty of not seeing these awards open to them.

For all these awards, it's vital to have clear criteria set, and communicated to all. Prizes should also be

interesting, relevant and incentivising:

**Quality Awards:** This type of award is given to any employee who delivers quality service in his/her company.

**Incentive Awards:** These are awards to enhance employee morale, get people to meet and/or exceed goals, and therefore encourage high-quality service or sales; these can be awarded to individuals or to a team.

**Distinguished Staff Awards:** This type of award is given to those individuals who have distinguished themselves by accomplishing something important for the firm: i.e. an individual who succeeds in bringing in a much-needed and wanted account/client; or to an individual who has found a solution to a nagging problem; or for regularly working long hours to meet demanding deadlines from customers.

**Award for Excellence:** Excellence awards are given to any employee who delivers consistent excellent service for the company.

**"Made a Difference" Award:** With this type of award, secretaries and other employees in a supportive role who are high achievers and leaders among their peers can receive recognition.

**Mentor of the Year:** This award is given to employees who have mentored/coached any employees successfully.

**Notable Nods:** Employees can give a "nod" to someone who has gone above and beyond the "call of duty". The recipient gets a token or points for each "nod" they receive, which when added up to a specified amount qualify for an incentive prize.

**Long-service:** This award should have different categories, such as 10-year, 20-year, 25-year, etc. And should apply to full-time, part-time employees as well as contractees. With the changing work dynamics, it may be that a full-time employee

changes to part-time or contractee. This individual should continue to qualify and be rewarded for continued service.

### 10.2 Criteria for Awards

The following is some of the criteria that organisers and judges can consider:

- Excellence of performance and execution of tasks
- Exceptional achievements
- Constructive ideas
- Suggestions that directly contribute to business growth
- Suggestions that directly contribute to cost-savings
- Efficiency
- Effectiveness
- Inventions
- High work ethics
- Commitment/Support/loyalty
- Professional skills/Skills Advancement
- Responsibility
- Organisational Achievement
- Interpersonal Relationships
- Gone above and beyond the “call of duty”

#### Criteria for Secretary of the Year

Nominees for secretarial awards could be evaluated on the following criteria:

- Technical Skills
- Initiatives/Creativity
- Administrative Skills
- Interpersonal Relations
- Management of Workload
- Writing skills
- Professionalism
- Quality of work
- Typing skills
- Pro-activeness
- Loyalty
- Commitment/dedication
- Telephone techniques
- Reception skills
- Accuracy
- Appearance and grooming
- Attitude
- Communication skills
- General Knowledge of their industry and their nation.

### 10.3 “Recognition” as a reward

Besides awards, there are numerous other ways of recognising good work or superior attitude:

#### Letters of appreciation:

Management should write a letter of thanks in recognition for a job well done.

#### Attendance of seminars:

Sponsoring attendance of an important seminar or event such as National Secretaries’ Day lunch or Expo.

#### Subscription:

Purchasing a subscription to relevant professional magazines, such as the CAREER SUCCESS magazine in South Africa, or [www.officedigest.com](http://www.officedigest.com) if there is no publication available.

#### Membership:

Paying for membership of an Association, such as The PSA in South Africa, thus allowing for networking opportunities with peers, and for attendance of educational associations.

#### Studying:

Sponsor and encourage the attainment of the Certified Professional Secretary (CPS®) rating, to demonstrate their competence and serve as professional role models.

#### Environment:

Purchasing new computer hardware or software, or ergonomically correct furniture and accessories, to make the office more attractive and enhance comfort and productivity.

#### Time-off:

One of the most appreciated rewards.

#### Gifts:

Appropriate business-related items include business cards, a desktop nameplate, a gift certificate for business items, desktop reference books, a monetary bonus for exemplary performance, vouchers for dinner or department store.

# Resources

Secretaries and Office Administration Professionals can rely on 14 fundamental sources of information, support and expertise.

1. Books
2. Magazines, journals
3. Newspapers
4. Catalogues, directories
5. E-mail newsletters
6. Websites
7. Internet search engines
8. The library
9. Associations
10. Expos
11. Mentors
12. Experts
13. Peers
14. A resources file

(where all relevant clippings and data are kept for easy one-stop reference)

Resources are necessary for various reasons: Information on career; how-to information for a particular task; information for a speech or presentation; information for manuals or policies; research for the boss, etc.

These resources need to be available, and where relevant, budgets need to be set so that these resources remain available.

As the 21st Century Secretary is the epi-centre of all offices, (s)he needs to be in the know, and also needs quick access to the know-how that may be required by her/himself or management.



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Gathering of  
Associations



Third International Summit held in Cape Town hosted by the South African Professional Secretaries Association



# Assessing performance the 360° way

## WHAT IS 360° ASSESSMENT

360° assessment means getting multiple perspectives on an individual's performance.

Each individual reviews themselves, is reviewed by all other work colleagues (Superior, Peers, Subordinates and Internal and External Customers) and at the same time allows the individual the opportunity to review all his/her colleagues.

## WHAT IS THE PURPOSE OF 360° ASSESSMENT

The purpose of 360° is to support the combined improvement of each individual through the use of information obtained from multiple sources for continued improvement, training and development.

This information is then used by the individual and his/her manager for his/her continued training, development and progress.

## Aviator

Organisations worldwide are constantly looking for new and better ways to improve employee performance. In South Africa there is a product called Aviator, which is a 360° computerised and web based assessment system to help them in this quest.

Why Aviator and 360° performance assessment? Research undertaken by CMT Consulting, the conceptual designers of Aviator, have found that high energy companies grow faster, are more profitably and deliver superior customer service when compared to low energy organisations. Further, the primary source of this energy is always leadership. But all organisations are out of energy over time. This is called eutropy. If organisations do not find a way to combat the natural forces of eutropy, they simply become less competitive and eventually go out of business.

Leadership creates the climate or contest for innovation and high energy performance.

The key role of leadership, therefore, is to continuously reverse the natural effects of eutropy by constantly injecting new energy into the system. One of the important methods for doing this is the 360° assessment technique, which is used as the platform for Aviator.

The purpose of 360° assessment is to provide multiple "views" of each individual and to use this information as a basis for individual development and raising individual energy and performance. CMT has found, for example, that self assessments are notoriously inaccurate!

This means that many corporate individuals operate under the misguided belief that they literally "walk in water" whereas many of their colleagues view them rather as "subsidiaries". This difference in perception can be a major performance stumbling block and energy drain. Correctly applied, 360° assessment can go a long way to closing this perception gap, and raising individual, team and company performance levels.

## Application

### • The Database

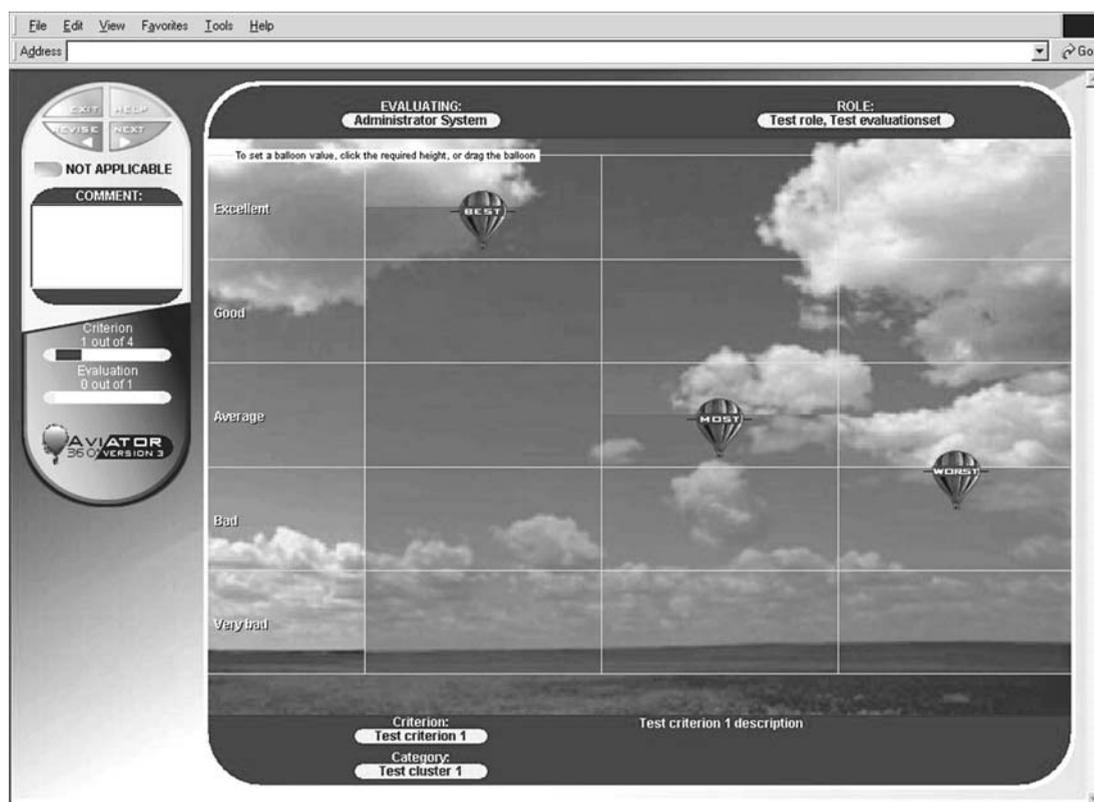
The first step is to set up the database in terms of who will assess whom. Usually an individual will do a self-assessment and also be assessed by a superior, peers and if applicable, subordinates. This is all done by a trainer in-house system administrator, using Aerodrome, the Aviator module specially designed for this purpose.

The next step is to customise the skills, behaviours and talents needed to perform each job in the organisation really well. Remember the goal is to help each individual go beyond the "coverage" to achieve the highest energy and excellence.

The entire database administration is completed by a small team of experts and involves very little time from employees, other than ratification of who will assess whom.

### • The Assessment

Once the database is complete all employees are



informed that certain assessments used to be completed within a given time period. All that is required of the individual is that (s)he log in to the computer system using a specially allocated password. All assessments are fully confidential and anonymous (except of course the superior assessment!) to encourage employees to be completely open and honest.

**Enjoy the ride!**

Employees are faced with a very different screen when using Aviator. The goal was to find a high energy solution that employees would enjoy using. This meant it had to be virtually interesting as well as practical. The solution was to design a screen using hot air balloons, as symbols of performance levels, with a natural outdoor backdrop. To add a touch of humour a crocodile was added to the swamp below. When performance is really bad, the crocodile snaps to remind you that you can easily land up in the swamp with the crocodiles!

**The Assessments**

Once logged on, the individual works through like with any other computer "game". The name of the person you are assessing appears at the top of the screen together with the first assessment criteria at the bottom. On the left hand side of the screen is a remote control (much like a TV remote control) which is used to control the assessments.

The main screen shows three hot air balloons which are used for the assessment.

**Fuzzy Logic - why three hot air balloons?**

All humans show a degree of variance in their behaviours. None of us can perform in a totally consistent manner all of the time.

To allow for this we designed the concept of "fuzzy logic" assessment which allows individuals to be assessed at their "Best", "Most of the time" and at "Worst", this providing a much more accurate picture of an individuals behaviour over time.

The three balloons represent each of these conditions using the computer mouse the individual simply moves each balloon to a position that best reflects his/her view of the person being assessed.

On the left hand side of the screen is a customised rating scale, which could be:

- Exceptional
- Exceeds expectations
- Meets expectations
- Needs improvement
- Needs immediate attention

Once you have completed assessing an individual, you submit your work and proceed with the next assessment. If you have run out of time, you can simply log off, and carry on with your assessments later when you have time.

**Reports**

The Aviator system automatically generates individual reports, which combine graphs and tables, which rank all the performance factors from highest to lowest. All of this is done automatically. The system allows password protected access to the reports according to client requirements. For example, every individual will be able to access his/her own report, and every manager will have access to his/her own report plus the reports of all subordinates.

**Power in use**

Like any other reports, the Aviator reports are meaningless if not used correctly. Generally the best results are obtained if the following rules are observed.

- Use Aviator at the beginning and during a performance period - not at the end only. This ensures a focus on development and not a possible form of punishment. In addition this reinforces an adult-adult culture, moving away from the often prevalent parent-child culture in many large organisations.

- Do not attach Aviator results directly to pay (Again the primary focus should be on development, which in turn leads to higher energy, performance and profitability).
- As far as possible, share the results as widely as possible. "Secrets" in companies drain energy.
- Ensure that each individual discusses his/her reports with the superior, peers and subordinates.
- Integrate with current company performance management systems, including measured performance outputs.

**Info on Aviator**

Designed by DMT Consulting (Pty) Ltd, Software designed by Icomtek, a division of the Council for Scientific and Industrial Research.

**For more information, visit the web site at [www.Aviator.co.za](http://www.Aviator.co.za)**



*“Employees are not overheads  
they are  
appreciating assets to be improved.”*

*Source: Orina*

**Another Example of  
PERFORMANCE APPRAISALS**

<b>GIS (GROUP INFORMATION SYSTEMS)</b> <b>INDIVIDUAL WORK PROFILE FOR</b> AN Other <b>EXECUTIVE SECRETARY</b> Career Path = SECRETARIAL Hay Grade = H7	
<b>WORK PROFILE</b>	
<b>CONTEXT</b> (Major forces, changes & larger goals affecting my work)	<b>CUSTOMERS</b> (Key receivers)
<ul style="list-style-type: none"> <li>Expectation that Executive Secretary will be becoming multi-skilled beyond traditional secretarial role.</li> <li>Dynamic, fast changing working environment</li> <li>Climate of demotivation.</li> <li>Excessive task orientation.</li> <li>High turnover of staff in the division.</li> <li>Ongoing administration of contracting staff.</li> <li>Changing technology.</li> <li>Tight budgetary control.</li> <li>Limited business knowledge.</li> <li>Frequent restructures.</li> <li>Affirmative Action policy.</li> <li>Low perceived status affecting career development and information sharing.</li> </ul>	<ul style="list-style-type: none"> <li>Manager</li> <li>GIS Systems Mgmt/Staff</li> <li>GIS Executive.</li> </ul>
<b>OUTPUTS</b> (What I must provide to my customers)	<b>COMPETENCIES</b>
<ol style="list-style-type: none"> <li>1. Documents</li> <li>2. Spreadsheets</li> <li>3. Diagrams/Organogram</li> <li>4. Photocopies</li> <li>5. Accounts</li> <li>6. Diaries</li> <li>7. Functions</li> <li>8. Telephone calls</li> <li>9. Filing System.</li> <li>10. Travel bookings</li> <li>11. Mail</li> <li>12. Office Moves</li> <li>13. Supplies</li> <li>14. Working Equipment</li> <li>15. Advice and guidance</li> <li>16. Arrange training</li> <li>17. Distributed communications</li> <li>18. Staff well being</li> <li>19. Budgets</li> <li>20. Resolve People Management Issues</li> <li>21. Secretarial Work Profiles</li> <li>22. Support Management/Staff</li> <li>23. Manex Control</li> <li>24. FSO Executive Report</li> <li>25. Remuneration Assessment Committee Admin</li> </ol>	<p><b><u>Technical</u></b></p> <ul style="list-style-type: none"> <li>Word Processing</li> <li>Minute Taking</li> <li>PC Literacy</li> <li>Software packages</li> <li>Organisation Knowledge</li> </ul> <p><b><u>Non-Technical</u></b></p> <ul style="list-style-type: none"> <li>Service Orientation</li> <li>Initiative</li> <li>Organising</li> <li>Integrity</li> <li>Judgement</li> <li>Self-Esteem</li> </ul>

## OUTPUT DETAILS

Outputs	Quality Requirements (Assessment Criteria)	Sources of Feedback (Accreditation/Validation process)
1. Documents (e.g. compile, type memo docs, MS word docs, reports, minutes etc.)	<ul style="list-style-type: none"> <li>• Accuracy</li> <li>• Professional Layout</li> <li>• Timeousness (speed)</li> <li>• Collated and Verified input</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Managers/Staff</li> </ul>
2. Spreadsheets (e.g. request/collate/incorporate data, statistics, formulas via Excel spreadsheets).	<ul style="list-style-type: none"> <li>• Accuracy</li> <li>• Professional layout</li> <li>• Timeousness (speed)</li> <li>• Collated and Verified input</li> <li>• Easily maintainable with explanatory notes</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Managers/Staff</li> </ul>
3. Diagrams (Organograms) (e.g. capture and maintain, Organogram).	<ul style="list-style-type: none"> <li>• Accurately collated</li> <li>• Timeously distributed</li> <li>• Logical flow</li> <li>• Collated and verified input</li> <li>• Clear communication</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Management/Staff</li> </ul>
4. Photocopies	<ul style="list-style-type: none"> <li>• Professional (readable and clear)</li> <li>• Accurately collated</li> <li>• Timeously distributed</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Management/Staff</li> </ul>
5. Accounts (e.g. T&E, Petty Cash, overtime sheets, standby, contractor invoices).	<ul style="list-style-type: none"> <li>• Timeous and accurate processing of accounts</li> <li>• Following up and ensuring payment within SLA</li> <li>• Maintain records of all invoices processed.</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Management/Staff /Contractors</li> </ul>
6. Diaries/Meetings	<ul style="list-style-type: none"> <li>• Effective time management</li> <li>• Up to date</li> <li>• All relevant information</li> <li>• Visitor's permits electronically submitted prior to visits</li> <li>• Confirmed Venues and Equipment</li> <li>• Confirmed attendees</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Management/Staff</li> </ul>
7. Functions (e.g. Year End Function, Cocktail Parties, Open forums, lunches).	<ul style="list-style-type: none"> <li>• Hassle free</li> <li>• Cost effective</li> <li>• Complete and timeous invitation</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Management/Staff</li> </ul>
8. Telephone Calls (e.g. redirect, screen, deal with queries, return).	<ul style="list-style-type: none"> <li>• Screen calls</li> <li>• Redirect appropriately</li> <li>• Maintain composure (e.g. with irate customers)</li> </ul> <p>Concise, accurate and timeous messages</p>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Management/Staff</li> </ul>
9. Filing system (create/maintain methodical logical up to date system)	<ul style="list-style-type: none"> <li>• Easy to use system to retrieve info</li> <li>• Regularly update of system</li> <li>• Documents are archived, shredded as appropriate</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Management/Staff</li> </ul>
10. Travel Bookings (e.g. Branch Visits, Overseas)	<ul style="list-style-type: none"> <li>• Effective time management</li> <li>• Up to date itinerary when applicable</li> <li>• Meet the specific requirements</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Management/Staff</li> </ul>
11. Mail (e.g. both paper and electronic).	<ul style="list-style-type: none"> <li>• Timeously distributed</li> <li>• Confidentiality maintained</li> <li>• Constantly monitored and actioned</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Management/Staff</li> </ul>
12. Office Moves (provide special requests/requirements to Office Planning)	<ul style="list-style-type: none"> <li>• Accurate collate requirements</li> <li>• Effective liaison with involved parties</li> <li>• Flexible</li> <li>• Approved plan</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Management/Staff</li> </ul>
13. Supplies (e.g. stationery, equipment consumables).	<ul style="list-style-type: none"> <li>• Necessary supplies ordered and kept in stock (never run out)</li> <li>• Supply distribution is controlled</li> <li>• Not keeping unnecessary supplies but ordering specialized supplies on request</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Management/Staff</li> </ul>

**OUTPUT DETAILS (continued)**

<b>Outputs</b>	<b>Quality Requirements</b> (Assessment Criteria)	<b>Sources of Feedback</b> (Accreditation/Validation process)
14. Working Equipment (e.g. Telephones, PC's, Printers, photocopier).	<ul style="list-style-type: none"> <li>• Report faulty equipment - ensure up time</li> <li>• Ensure enough printer cartridges and other consumables for customer use</li> <li>• Workstations ready when new staff join</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Management/Staff</li> </ul>
15. Advice and guidance (to staff and secretaries)	<ul style="list-style-type: none"> <li>• Complete and factual</li> <li>• Unbiased</li> <li>• Timeous</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Management/Staff</li> </ul>
16. Book training	<ul style="list-style-type: none"> <li>• Verify training requirements</li> <li>• Communicate requirements</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Management/Staff •</li> </ul>
17. Distributed Communications	<ul style="list-style-type: none"> <li>• Follow-up on feedback when required</li> <li>• Maintain accuracy of distribution channels</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Management/Staf</li> </ul>
18. Staff well being (e.g. flowers, gifts, access to systems).	<ul style="list-style-type: none"> <li>• Staff have necessary access (i.e. cards/ networks etc.)</li> <li>• Staff HR related issues (e.g. leave forms etc.) are maintained / kept up to date</li> <li>• Staff welfare (e.g. flowers when sick etc.)</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Management/Staf</li> </ul>
19. Budgets (e.g. forecasting, capture, monitoring, controlling).	<ul style="list-style-type: none"> <li>• Accurate input / forecast</li> <li>• Need knowledge of systems (e.g. ELS, Spiderman, Budget</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Management/Staf</li> </ul>
20. Resolve People Management issues	<ul style="list-style-type: none"> <li>• Available/approachable</li> <li>• Confidentiality maintained</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Management/Staf</li> </ul>
21. Secretary Work Profiles	<ul style="list-style-type: none"> <li>• Valuable Advice/Guidance/Input on work profiles</li> </ul>	<ul style="list-style-type: none"> <li>• A Cameron</li> </ul>
22. Administration of Contractors (i.e budget control, payment)	<ul style="list-style-type: none"> <li>• Up to date reconciled monthly spreadsheet on payments and outstanding payments (tracking system)</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• Contractor</li> </ul>
23. Manex Control (i.e maintain manex, submit adjustments for 'foreign' entries)	<ul style="list-style-type: none"> <li>• Maintained/controlled Manex</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> </ul>
24. FSO Executive Report	<ul style="list-style-type: none"> <li>• Accuracy</li> <li>• Professional Layout</li> <li>• Collated/Verified input</li> <li>• Timeous Distribution</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Executive</li> <li>• GIS Systems Management/ Staff</li> </ul>
25. Remuneration Assessment Committee Administration (ie. Secretary)	<ul style="list-style-type: none"> <li>• Minutes to be an accurate reflection of meetings</li> <li>• Timeous salary/title changes</li> <li>• Effective Filing/Archiving system</li> <li>• Confidentiality maintained</li> <li>• Informed Staff / Management</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• RAC</li> <li>• GIS Systems Management/ Staff</li> </ul>

### COMPETENCY DETAILS

Technical Competencies	Assessment Criteria	Sources of Feedback
<ul style="list-style-type: none"> <li>Word Processing <i>e.g. Knowledge of Table of Contents/Formulas.</i></li> </ul>	<ul style="list-style-type: none"> <li>Accuracy</li> <li>Speed</li> <li>Layout / presentation</li> </ul>	<ul style="list-style-type: none"> <li>Manager</li> <li>GIS Systems Management/Staff</li> </ul>
<ul style="list-style-type: none"> <li>Minute Taking</li> </ul>	<ul style="list-style-type: none"> <li>Accurate reflection of the meeting</li> </ul>	<ul style="list-style-type: none"> <li>Manager</li> <li>GIS Systems Management/Staff</li> </ul>
<ul style="list-style-type: none"> <li>PC Literacy</li> </ul>	<ul style="list-style-type: none"> <li>Efficient knowledge on how to operate PC and be able to solve minor PC software problems</li> </ul>	<ul style="list-style-type: none"> <li>Manager</li> <li>GIS Systems Management/Staff</li> </ul>
<ul style="list-style-type: none"> <li>Software Packages (e.g. MS Office; Intranet; Memo; ABC flow <i>e.g. Should be proficient in many software packages</i></li> </ul>	<ul style="list-style-type: none"> <li>Documents are well presented / well laid out / professional</li> <li>Documents are timeously completed</li> <li>Intranet used for documentation etc.</li> </ul>	<ul style="list-style-type: none"> <li>Manager</li> <li>GIS Systems Management/Staff</li> </ul>
<ul style="list-style-type: none"> <li>Organisational Knowledge (distribution channels)</li> </ul>	<ul style="list-style-type: none"> <li>Informed staff</li> <li>Peers</li> <li>Manager</li> </ul>	<ul style="list-style-type: none"> <li>Manager</li> <li>GIS Systems Management/Staff</li> </ul>
<ul style="list-style-type: none"> <li>Service Orientation <i>Continually expresses a predominant concern for providing help to others and servicing their needs over his/her own often in service of high moral and ethical standards. Includes selfless, generous, customer-focused reliable.</i></li> </ul>	<ul style="list-style-type: none"> <li>Honors commitments made to customers</li> <li>Behaves courteously towards customers especially when they are unreasonable</li> <li>Looks pro-actively for opportunities to improve service to customers</li> </ul>	<ul style="list-style-type: none"> <li>Manager</li> <li>GIS Systems Management/Staff</li> </ul>
<ul style="list-style-type: none"> <li>Initiative <i>Being driven and guided by one's own energy, commitment or willingness to translate ideas into action. Includes proactivity, self-starting, self-motivating, internal locus of control.</i></li> </ul>	<ul style="list-style-type: none"> <li>Identifies and proposes alternative solutions to problems and issues</li> <li>Takes action without being prompted in unforeseen situations</li> <li>Uses knowledge from previous experience to ensure that preventative measures are in place to forestall problems occurring again</li> </ul>	<ul style="list-style-type: none"> <li>Manager</li> <li>GIS Systems Management/Staff</li> </ul>
<ul style="list-style-type: none"> <li>Organising <i>Ordering and integrating information into meaningful wholes (into categories, models, structures, concepts, etc) Includes structuring, planning, conceptualising, inductive thinking.</i></li> </ul>	<ul style="list-style-type: none"> <li>Prioritises tasks according to urgency</li> <li>Demonstrates ability to structure a variety of tasks into a logical process</li> <li>Demonstrates ability to arrange functions in an appropriate manner</li> </ul>	<ul style="list-style-type: none"> <li>Manager</li> <li>GIS Systems Management/Staff</li> </ul>
<ul style="list-style-type: none"> <li>Integrity <i>Consistently acting and behaving in ways that are congruent and aligned with one's espoused values, theories and beliefs. Includes congruence, trustworthiness, reliability, internal consistency.</i></li> </ul>	<ul style="list-style-type: none"> <li>Accepts responsibility for own actions</li> <li>Displays consistent behavior</li> <li>Maintains confidentiality at all times</li> </ul>	<ul style="list-style-type: none"> <li>Manager</li> <li>GIS Systems Management/Staff</li> </ul>
<ul style="list-style-type: none"> <li>Judgement <i>Assessing multiple sources of data, information and experience to generate appropriate criteria for understanding and making decisions about 'fuzzy' (complex, uncertain, multidimensional, unstable or chaotic) situations or circumstances. Includes assessing, evaluating, decision-making, problem solving.</i></li> </ul>	<ul style="list-style-type: none"> <li>Analyses facts before making decisions</li> <li>Maintains objectivity in decision making</li> <li>Makes decisions in the absence of superiors</li> </ul>	<ul style="list-style-type: none"> <li>Manager</li> <li>GIS Systems Management/Staff</li> </ul>

**COMPETENCY DETAILS (continued)**

<b>Technical Competencies</b>	<b>Behavioural Indicators</b>	<b>Sources of Feedback</b>
<ul style="list-style-type: none"> <li>• Self-esteem <i>Understanding, appreciating and accepting all the aspects of one's self identify - both positive and negative. Includes self-acceptance, self-regard, trusting.</i></li> </ul>	<ul style="list-style-type: none"> <li>• Is able to accept criticism in an objective manner</li> <li>• Is able to trust own judgement</li> <li>• Recognises own competencies and lack of competencies</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Management/Staff</li> </ul>
<ul style="list-style-type: none"> <li>• Sense of Urgency <i>Tends to feel personal responsibility and accountability for making critical decisions about tasks and getting things done in a timely and unhesitating fashion. Includes disciplined, impatient, focused, driven.</i></li> </ul>	<ul style="list-style-type: none"> <li>• Responds promptly to issues/tasks/requests given to her</li> <li>• Provides timeous feedback on outstanding issues/tasks/requests</li> <li>• Ensures tasks are completed in order of priority</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Management/Staff</li> </ul>
<ul style="list-style-type: none"> <li>• Organisation Understanding <i>Knowledge of the mission, strategy, structure, culture, technology, systems, procedures and information sources of the organisation and your own functional unit. Knowledge of organisational relationships.</i></li> </ul>	<ul style="list-style-type: none"> <li>• Builds up contacts within the companies for advice and guidance when needed</li> <li>• Uses organisational understanding to complete tasks in an effective and efficient manner</li> <li>• Put processes in place to streamline interaction with other departments e.g. DTE tracking</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Management/Staff</li> </ul>
<ul style="list-style-type: none"> <li>• Information Scanning <i>Focusing on and selecting key and relevant information for further processing and attention. Includes information exploring, focusing, information gathering, data gathering.</i></li> </ul>	<ul style="list-style-type: none"> <li>• Checks a broad range of sources for relevant information</li> <li>• Synthesizes information from a number of sources into a coherent whole</li> <li>• Checks for consistency of content in information gathered from various sources and resolves any anomalies by further investigation</li> </ul>	<ul style="list-style-type: none"> <li>• Manager</li> <li>• GIS Systems Management/Staff</li> </ul>

**FSP Systems : 360-degree PERFORMANCE FEEDBACK**  
**(from customers, managers, peers, reporting staff & subject matter experts)**

Feedback for: AN Other \_\_\_\_\_ from: Joe-Soap \_\_\_\_\_ relationship: Manager \_\_\_\_\_  
Appraisee Name

**REVIEW PERIOD - JULY - NOVEMBER 1999**

This document provides a means for GIS Systems staff to obtain 360-degree feedback with respect to both the outputs delivered to customers and the competencies displayed in doing so.

The **Outputs and their Quality Requirements** and then the **Competencies and their Assessment Criteria or Behavioural Indicators** are listed on the following pages.

For **Outputs**, the **Comments** column should be used to substantiate the rating given. **Ratings of + and ++ must be substantiated as per the definitions in the table below.**

For **Competencies**, the **Comments** column should be used to state whether or not you perceive each competency to be evidenced by one or more of the assessment criteria or behavioural indicators listed. If none of the assessment criteria or behavioural indicators is observed for a competency the **Comments** column should be used to give clarification.

The **Performance Rating (R)** column should be used to rate each output using the definitions in the following table:

<b>RATING</b>	<b>DESCRIPTION</b>
-	Performance is not entirely satisfactory and requires intervention.
=	Performance is entirely satisfactory and outputs are fully delivered. This rating means that performance is 100%.
+	All outputs are met, AND opportunities have been seized by the appraisee to perform some additional value-adding tasks/functions beyond what is expected to deliver outputs.
	NB: All ratings must be one of - = +
	NB: NO ratings are given for competencies.

The **Service Level (S/L)** column is used to rate the service level with respect to Outputs as the same or better or worse than before ie S, B or W. In other words is the trend in service level flat/unchanged (S) or improving (B) or declining (W)?

**FSP Systems : 360-degree PERFORMANCE FEEDBACK**  
**(from customers, managers, peers, reporting staff & subject matter experts)**

Feedback for: AN Other \_\_\_\_\_ from: Joe-Soap \_\_\_\_\_ relationship: Manager \_\_\_\_\_  
 Appraisee Name

Outputs	Quality Requirements	Comments	R	S/L S/B/W	Appraisee's Response
1. Documents (e.g. compile, type memo docs, MS word docs, reports, minutes etc.)	<ul style="list-style-type: none"> <li>• Accuracy</li> <li>• Professional Layout</li> <li>• Timeousness (speed)</li> <li>• Collated and Verified input</li> </ul>		= = + =		
2. Spreadsheets (e.g. request/collate/incorporate data, statistics, formulas via Excel spreadsheets).	<ul style="list-style-type: none"> <li>• Accuracy</li> <li>• Professional layout</li> <li>• Timeousness (speed)</li> <li>• Collated and Verified input</li> <li>• Easily maintainable with explanatory notes</li> </ul>		= = + = =		
3. Photocopies	<ul style="list-style-type: none"> <li>• Professional (readable and clear)</li> <li>• Accurately collated</li> <li>• Timeously distributed</li> </ul>		= = +		
4. Accounts (e.g. T&E, Petty Cash, overtime sheets, standby, contractor invoices).	<ul style="list-style-type: none"> <li>• Timeous and accurate processing of accounts</li> <li>• Following up and ensuring payment within SLA</li> <li>• Maintain records of all invoices processed</li> </ul>		+ = =		
5. Diaries/ Meetings	<ul style="list-style-type: none"> <li>• Effective time management</li> <li>• Up to date</li> <li>• All relevant information</li> <li>• Visitor's permits electronically submitted prior to visits</li> <li>• Confirmed Venues and Equipment</li> <li>• Confirmed attendees</li> </ul>		= = = = = =		
6. Functions (e.g. Year End Function, Cocktail Parties, Open forums, lunches).	<ul style="list-style-type: none"> <li>• Hassle free</li> <li>• Cost effective</li> <li>• Complete and timeous invitation</li> </ul>		+ + =		
7. Telephone Calls (e.g. redirect, screen, deal with queries, return).	<ul style="list-style-type: none"> <li>• Screen calls</li> <li>• Redirect appropriately</li> <li>• Maintain composure (e.g. with irate customers)</li> <li>• Concise, accurate and timeous messages</li> </ul>		= = = =		
8. Filing system (create/maintain methodical logical up to date system).	<ul style="list-style-type: none"> <li>• Easy to use system to retrieve info</li> <li>• Regularly update of system</li> <li>• Documents are archived, shredded as appropriate</li> </ul>		= = =		
9. Travel Bookings (e.g Branch Visits, Overseas).	<ul style="list-style-type: none"> <li>• Effective time management</li> <li>• Up to date itinerary when applicable</li> <li>• Meet the specific requirements</li> </ul>		= = =		
10. Mail (e.g. both paper and electronic).	<ul style="list-style-type: none"> <li>• Timeously distributed</li> <li>• Confidentiality maintained</li> <li>• Constantly monitored and actioned</li> </ul>		= = +		

**FSP Systems : 360-degree PERFORMANCE FEEDBACK**  
**(from customers, managers, peers, reporting staff & subject matter experts)**

Feedback for: AN Other \_\_\_\_\_ from: Joe-Soap \_\_\_\_\_ relationship: Manager \_\_\_\_\_  
 Appraisee Name

Outputs	Quality Requirements	Comments	R	S/L S/B/W	Appraisee's Response
11. Office Moves (provide special requests/requirements to Office Planning).	<ul style="list-style-type: none"> <li>• Accurate collated requirements</li> <li>• Effective liaison with involved parties</li> <li>• Flexible</li> <li>• Approved plan</li> </ul>		= = = =		
12. Supplies (e.g. stationery, equipment consumables).	<ul style="list-style-type: none"> <li>• Necessary supplies ordered and kept in stock (never run out)</li> <li>• Supply distribution is controlled</li> <li>• Not keeping unnecessary supplies but ordering specialized supplies on request</li> </ul>		= = =		
13. Working Equipment (e.g. Telephones, PC's, Printers, photocopier).	<ul style="list-style-type: none"> <li>• Report faulty equipment - ensure up time</li> <li>• Ensure enough printer cartridges and other consumables for customer use</li> </ul>		+ =		
14. Advice and guidance (to staff and secretaries)	<ul style="list-style-type: none"> <li>• Complete and factual</li> <li>• Unbiased</li> <li>• Timeous</li> </ul>	I can't assess this			
15. Book training	<ul style="list-style-type: none"> <li>• Verify training requirements</li> <li>• Communicate requirements</li> </ul>		= =		
16. Distributed Communications	<ul style="list-style-type: none"> <li>• Follow-up on feedback when required</li> <li>• Maintain accuracy of distribution channels</li> </ul>		+ + =		
17. Staff well being (e.g. flowers, gifts, access to systems).	<ul style="list-style-type: none"> <li>• Staff have necessary access (i.e. cards/ networks etc.)</li> <li>• Staff HR related issues (e.g. leave forms etc.) are maintained / kept up to date</li> <li>• Staff welfare (e.g. flowers when sick etc.)</li> </ul>		= = =		
18. Budgets (e.g. forecasting, capture, monitoring, controlling).	<ul style="list-style-type: none"> <li>• Accurate input / forecast</li> <li>• Need knowledge of systems (e.g. EIS, Spiderman, Budget)</li> </ul>		= =		
19. Resolve People Management issues.	<ul style="list-style-type: none"> <li>• Available/approachable</li> <li>• Confidentiality maintained</li> </ul>	I can't assess this but AN Other is very well liked by all members of my management team, she adds value.			
20. Administration of Contractors (i.e budget control, payment).	<ul style="list-style-type: none"> <li>• Up to date reconciled monthly spreadsheet on payments and outstanding payments (tracking system)</li> </ul>		=		
21. Manex Control (i.e maintain manex, submit adjustments for 'foreign' entries).	<ul style="list-style-type: none"> <li>• Maintained/controlled Manex</li> </ul>		=		
22. GIS Executive Report.	<ul style="list-style-type: none"> <li>• Accuracy</li> <li>• Professional Layout</li> <li>• Collated/Verified input</li> <li>• Timeous Distribution</li> </ul>		= = = +		

**GIS Systems : 360-degree PERFORMANCE FEEDBACK**  
**(from customers, managers, peers, reporting staff & subject matter experts)**

Feedback for: AN Other from: Joe-Soap relationship: Manager  
 Appraisee Name

Outputs	Quality Requirements	Comments	Appraisee's Response
<ul style="list-style-type: none"> <li>Word Processing e.g. Knowledge of Table of Contents/ Formulas.</li> </ul>	<ul style="list-style-type: none"> <li>Accuracy</li> <li>Speed</li> <li>Layout / presentation</li> </ul>	AN Other is highly efficient and is 100% committed to doing the job right the first time and on time and maximises use of her time very effectively.	
<ul style="list-style-type: none"> <li>Minute Taking.</li> </ul>	<ul style="list-style-type: none"> <li>Accurate reflection of the meeting</li> </ul>	This does not happen often.	
<ul style="list-style-type: none"> <li>PC Literacy.</li> </ul>	<ul style="list-style-type: none"> <li>Efficient knowledge on how to operate PC and be able to solve minor PC software problems</li> </ul>	Yes.	
<ul style="list-style-type: none"> <li>Software Packages (e.g. MS Office; Intranet; Memo; ABC flow e.g. Should be proficient in many software packages.</li> </ul>	<ul style="list-style-type: none"> <li>Documents are well presented / well laid out / professional</li> <li>Documents are timeously completed</li> <li>Intranet used for documentation etc.</li> </ul>	Refer to comments on Word Processing regarding performance. AN Other should reserve the time to improve her knowledge and skills in the use of new technologies.	Il have not had the time to concentrate on this because of CPS, Secs Website etc. Will include in development plan for 2000.
<ul style="list-style-type: none"> <li>Organisational Knowledge (distribution channels).</li> </ul>	<ul style="list-style-type: none"> <li>Informed staff</li> <li>Peers</li> <li>Manager</li> </ul>	Excellent, this really adds value to the overall performance of my job.	
<ul style="list-style-type: none"> <li>Service Orientation Continually expresses a predominant concern for providing help to others and servicing their needs over his/her own often in service of high moral and ethical standards. Includes selfless, generous, customer-focused reliable.</li> </ul>	<ul style="list-style-type: none"> <li>* Honours commitments made to customers</li> <li>Behaves courteously towards customers especially when they are unreasonable</li> <li>Looks pro-actively for opportunities to improve service to customers</li> </ul>	AN Other is a role model for all secretaries on all service orientation behaviours.	
<ul style="list-style-type: none"> <li>Initiative Being driven and guided by one's own energy, commitment or willingness to translate ideas into action. Includes proactivity, self-starting, self-motivating, internal focus of control.</li> </ul>	<ul style="list-style-type: none"> <li>Identifies and proposes alternative solutions to problems and issues</li> <li>Takes action without being prompted in unforeseen situations</li> <li>Uses knowledge from previous experience to ensure that preventative measures are in place to forestall problems occurring again</li> </ul>	AN Other is a self starter and always seeks to maximise the use of her time.	
<ul style="list-style-type: none"> <li>Organising Ordering and integrating information into meaningful wholes (into categories, models, structures, concepts, etc) Includes structuring, planning, conceptualising, inductive thinking.</li> </ul>	<ul style="list-style-type: none"> <li>Prioritises tasks according to urgency</li> <li>Demonstrates ability to structure a variety of tasks into a logical process</li> <li>Demonstrates ability to arrange functions in an appropriate manner</li> </ul>	AN Other is self sufficient/ organised. I can't remember the last time that I needed to give advice on how to get through the enormous amount of secretarial work I generate.	

**GIS Systems : 360-degree PERFORMANCE FEEDBACK**  
**(from customers, managers, peers, reporting staff & subject matter experts)**

Feedback for: AN Other Appraisee Name from: Joe-Soap relationship: Manager

Competencies	Assessment Criteria or Behavioural Indicators	Comments	Appraisee's Response
<ul style="list-style-type: none"> <li>Integrity</li> </ul> <i>Consistently acting and behaving in ways that are congruent and aligned with one's espoused values, theories and beliefs. Includes congruence, trust-worthiness, reliability, internal consistency.</i>	<ul style="list-style-type: none"> <li>Accepts responsibility for own actions</li> <li>Displays consistent behavior</li> <li>Maintains confidentiality at all times</li> </ul>	AN Other is 110% trustworthy.	
<ul style="list-style-type: none"> <li>Judgement</li> </ul> <i>Accessing multiple sources of data, information and experience to generate appropriate criteria for understanding and making decisions about 'fuzzy' (complex, uncertain, multi-dimensional, unstable or chaotic) situations or circumstances. Includes assessing, evaluating, decision-making, problem solving.</i>	<ul style="list-style-type: none"> <li>Analyses facts before making decisions</li> <li>Maintains objectivity in decision making</li> <li>Makes decisions in the absence of superiors</li> </ul>	AN Other is self sufficient but has the judgement to refer to me before acting when required.	
<ul style="list-style-type: none"> <li>Self-esteem</li> </ul> <i>Understanding, appreciating and accepting all the aspects of one's self identify - both positive and negative. Includes self-acceptance, self-regard, trusting.</i>	<ul style="list-style-type: none"> <li>Is able to accept criticism in an objective manner</li> <li>Is able to trust own judgement</li> <li>Recognises own competencies and lack of competencies</li> </ul>	AN Other has a high self image but at the same time is willing to learn from others.	
<ul style="list-style-type: none"> <li>Sense of Urgency</li> </ul> <i>Tends to feel personal responsibility and accountability for making critical decisions about tasks and getting things done in a timely and unhesitating fashion. Includes disciplined, impatient, focused, driven.</i>	<ul style="list-style-type: none"> <li>Responds promptly to issues/tasks/requests given to her</li> <li>Provides timeous feedback on outstanding issues/ tasks/requests</li> <li>Ensures tasks are completed in order of priority</li> </ul>	AN Other's work ethic is unquestionable and professional.	
<ul style="list-style-type: none"> <li>Organisation Understanding</li> </ul> <i>Knowledge of the mission, strategy, structure, culture, technology, systems, procedures and information sources of the organisation and your own functional unit. Knowledge of organisational relationships.</i>	<ul style="list-style-type: none"> <li>Builds up contacts within the companies for advice and guidance when needed</li> <li>Uses organisational understanding to complete tasks in an effective and efficient manner</li> <li>Put processes in place to streamline interaction with other departments e.g. DTE tracking</li> </ul>	AN Other certainly operates as an executive secretary.	



# Career-path as per the first Blueprint

(1995 edition, published by Dictum Publishers (Pty) Ltd)

## A CAREER PATH FOR THE SECRETARIAL PROFESSION

“Take pride in your job and your profession as a whole. After all, how can you expect others to regard your job

highly if you don’t think much of it yourself? Those who think they are ‘just secretaries’ haven’t taken stock of what it takes to succeed as an office professional.”  
Acknowledgement to Douglas Leland.

### Secretarial Strata

The time has come to award the secretarial profession the respect it deserves in terms of providing it with a career path.

Whether in the realms of traditional task performance or in the light of today’s more office managerial role, the secretary needs clear delineation and direction for her professional growth.

In some organisations the secretary changes position, title or status when her manager does; in other companies her promotion is dependent on her own competence; yet others will have both systems running side by side.

It is clear however that a clearly defined career path should exist for all secretaries who are serious about their profession - and it is unacceptable today that the secretary should be totally reliant on her manager’s promotion prospects in order for her/him to climb the success ladder.

#### Some of the problem areas have been:

- Secretarial titles are fused or combined ie. Secretary/PRO.; Secretary/Girl Friday  
This is not found in other professions.
- A secretarial title changing because the manager’s title has changed.  
This undermines the profession as its members are not viewed as having independent worth.
- Secretarial titles being awarded indiscriminately.  
It has been found that a 21 year old has the title of Executive Secretary and a highly experienced secretary in her late 30’s carries the title of Secretary without any qualifying adjective - such as Senior Administrative or Executive - which

would be more appropriate for the level (s)he’s at.

For change to happen and to happen successfully both the members of the secretarial profession and those in Human Resources - including employment agencies - should be informed of appropriate titles vis-a-vis experience and qualifications; and of appropriate career paths. Only these two professions working cooperatively and consistently side by side will ensure a successful implementation of acceptable strata in the profession.

The strata that follow are not meant to be prescriptive but rather to fulfil the request for delineation and definition.

#### Acceptable titles and basic specs

(It is important to observe that a title such as Girl Friday is not acceptable - it is reminiscent of Robinson Crusoe days and therefore anachronistic. Today there are more appropriate titles such as Office Assistant.)

In drawing up the following job descriptions and relevant titles we have listed the traditional titles and have also included more progressive titles in italics. It is up to each organisation, dependent on industry or corporate culture, to decide which titles are more appropriate: whether the conventional/conservative or the progressive ones, or even a combination of both. Currently there are a number of titles in the market place, many similar to the ones provided here. Therefore these are meant as prototypes, and not exclusive of other titles which dignify the profession.

**Para-Stratum**

□ **Switchboard operator/Telephonist**

*Telecommunications operator*

**The incumbent is generally required to:**

- Handle incoming calls by routing the calls promptly and when necessary noting messages accurately.
- Control outgoing calls.
- Handle fax transmissions when relevant.
- Should not be handling visitors, typing or filing (unless in a small company).
- Adhere to company dress code.
- Aware of the public relations implications of tasks.

**Desirable qualifications**

A good telephone voice and manner is essential. The incumbent should be knowledgeable of telephone systems generally and in particular of the telephone system used by the company - and if not, should be given training in order to use the equipment effectively and efficiently. Attendance of one-day refresher courses on switchboard/telephone techniques is recommended. It is important that on the first day, the incumbent attend an orientation programme so that a professional image of the company is projected the moment the telephone is answered.

As the main task is to make a good impression on customers and business associates, on-the-job training may be necessary to ensure that the company's message is sent out in a most professional manner.

**Personal characteristics**

- Pleasant voice and personality which would enable the incumbent to handle both the routine calls and the unpleasant ones calmly and with good manners.
- Present a professional appearance, to coincide with high-quality image of the company.
- Arrive at the office ready to work promptly.
- Strive for perfect attendance.
- Good interpersonal skills would be an asset.

**General**

Although falling in the general realm of the secretarial environment, it would be demeaning the importance of this position to the organisation by not putting it in under a separate strata as many individuals make a lifelong occupation out of being a switchboard operator/telephonist (although it is recognised that many aspiring secretaries have started off from this position). As this is a frontline position (albeit more often than not behind closed doors) it requires the use of hidden skills and talents (e.g. enthusiasm, having a pleasant disposition, being able to cope under pressure, etc.) it is thus important that the individuals who hold these positions be seen by management as an important part of the team and that they are rewarded for their professionalism accordingly. Therefore for those who choose to make this their career, their salaries and perks should be commensurate with senior secretarial posts. These individuals are responsible for excellent client service and deserve respect for their own special status.

**Stratum One**

□ **Typist**

*PC operator*

**The incumbent is generally required to:**

- Have accurate typing (Average 45 wpm).
- Have knowledge of relevant (state of the art) typing equipment.
- Have knowledge of layout principles.
- Transcription from notes/dictaphone.
- Maintain a filing & retrieval system: paper and electronic if necessary.
- May be engaged in general office duties.
- Adhere to company dress code.
- Aware of the public relations implications of tasks.

**Desirable qualifications**

Secondary school certificate as well as secretarial course certificate. Although the incumbent will receive on-the-job training, (s)he should be familiar with general office routine and equipment.

**Personal characteristics**

- Presents a professional appearance, to coincide with high-quality image of the company.
- Respect for punctuality and regular attendance.
- Pays careful attention to work assignments as well as executing them promptly.
- Has a pleasant disposition/ability to work well with other people.
- Tact, courtesy and initiative are necessary in handling routine problems.

**Stratum One (Continued)**

- Must be able to handle large volumes of routine work and have an ability to manage time wisely in order to meet deadlines.
- Be adaptable.
- Ability to learn and apply new skills and knowledge.
- Aware of the public relations implications of tasks.

**General**

A key to success in this position is to be flexible in approaching both people and assignments. Duties assigned to typists are usually detail oriented and require concentration.

In this category it is also possible to have senior PC operators.

□ **Receptionist/Reception-Secretary**

*Frontline officer*

**The incumbent is generally required to:**

- Receive visitors and make their waiting time as comfortable as possible after notifying the relevant staff member of their arrival.
- Answer telephone or switchboard and route calls promptly and/or take messages efficiently.
- Do typing and maintain a filing (paper & electronic) system for certain individuals within the department.
- Handle fax transmissions - incoming and outgoing
- Control petty cash.
- Control maintenance of office equipment.
- Sort and distribute mail within the department.
- Maintain a constant stock of company brochures for distribution.
- Control courier and messenger despatch.
- Control the ordering and distribution of stationery.
- Responsible for maintenance of the reception area i.e. ordering of fresh flowers, replacing old magazines, etc.
- Adhere to company dress code.
- Aware of the public relations implications of tasks.

**Desirable qualifications**

This position ideally requires six months of experience in a clerical position. A post-matric course of at least a year's duration in secretarial or office management skills or a combination of experience, education/training which would provide the level of knowledge, skill and ability required to perform the

job efficiently.

**The incumbent should generally know how to:**

Properly operate a variety of office related machines; communicate effectively with company departments and divisions and business associates, and have an excellent knowledge of the company; take and forward complete and accurate messages. It is worth noting that a lot of emphasis is placed on the individual having a pleasant disposition since the main function is to make a good impression on customers and business associates. Bearing this in mind, it is possibly realistic to place the personal characteristics of the incumbent before the qualification requirements but at no cost to the effective and efficient running of the office.

**Personal characteristics**

- Pleasant speaking manner.
- Respects punctuality and regular attendance.
- Pays careful attention to office duties. Is willing to help co-workers finish their assignments when necessary.
- Accepts and executes all work assignments promptly, especially detail-oriented tasks.
- Has a pleasant disposition.

**General**

Accurate typing and good lay-out are part of a company's corporate image - thus the incumbent has an important role to play in presenting an image, via the documents sent out, of respect for accuracy and quality.

The receptionist has various options regarding a career path. These could be determined by own personal ambition or by the industry the incumbent is in, for example: the hotel industry, game lodges - where the receptionist may not choose to follow the secretarial route but be promoted to supervisor, PR or department manager.

It is our recommendation that the above-listed titles reflect employees who work for an office/department/branch. They provide assistance in general, and do not necessarily report to, or assist one specific person.

When a candidate is required to perform the above duties to one/two people specifically, the title should be Junior Secretary.

## Stratum Two

□ **Junior Secretary**

*Information co-ordinator/junior management assistant*

**The incumbent is generally required to:**

- Answer telephones and screen calls; redirect calls as appropriate and take messages efficiently.
- Also makes telephone calls.
- Liaise with clients.
- Type from notes/dictaphone/shorthand/speed writing.
- Take notes and transcribe from notes/dictaphone
- Maintain a filing & retrieval system: paper & electronic.
- Responsible for incoming/outgoing fax/telex transmissions.
- Co-ordinate meetings.
- Maintain an up-to-date diary.
- Responsible for maintenance of office equipment.
- Responsible for petty cash.
- Responsible for stationery.
- Responsible for some travel arrangements.
- Responsible for area maintenance.
- Responsible for maintaining an up-to-date 'secretary manual'.
- Aware of the public relations implications of tasks.

**Desirable qualifications**

The incumbent should have a minimum of a one year post-matric qualification and ideally a minimum of one year experience as typist or receptionist.

**Personal characteristics**

- Well groomed and well spoken.
- Willing to learn and willing to cooperate.
- Loyal and ethical in her attitude and behaviour.

**General**

Producing quality work and showing a sense of responsibility and commitment will ensure the incumbent is on the way to climb the success ladder.

□ **Office Assistant**

*Office co-ordinator*

Also known as Girl Friday - a title which is patronising, demeaning and anachronistic. A progressive elimination of this title should occur internationally.

The profile of tasks to be performed by this incumbent is determined by the size of the company or by the role of the receptionist. The list that follows provides a broad spectrum of what is normally expected.

**The incumbent is generally required to:**

- Type from notes/dictaphone when necessary.
- Operate the telex and telefax machine.
- Maintain a filing & retrieval system: paper & electronic.
- Responsible for incoming and outgoing telex and fax transmissions.
- Responsible for distribution of mail.
- Involved in some accounting work (e.g. wages).
- Liaise with clients.
- Co-ordinate schedules/itineraries/appointments of the department.
- Control stationery.
- Plan meetings and functions of the department.
- Relieve on the switchboard.
- Adhere to company dress code.
- Aware of the public relations implications of tasks.

**Desirable qualifications**

As for a junior secretary - but in lieu of receptionist/typist experience could be experienced in administration department.

**Personal characteristics**

- Good team spirit and respect and sound worker relations.
- Respect for punctuality and achievement of goals.

**General**

Attention to detail, sense of prioritisation, good interpersonal skills are some of the attributes that will ensure career success.

### Stratum Three

□ **Secretary**

*Management assistant/Administrative assistant*

**The position generally requires of the incumbent:**

- Accurate and fast typing.
- Taking notes and transcription from notes/dicta phone -Updated knowledge of paper and electronic filing and retrieval systems.
- Good people skills.
- Good communication skills.
- Excellent command of relevant 'official' language/s, excellent spelling and grammar.
- Ability to co-ordinate diary: paper & electronic.
- Arrange meetings and in some instances attend them for minute taking.
- Liaison with clients.
- Co-ordination of travel arrangements.
- Assisting with corporate functions and acting as hostess, if necessary.
- Deal with confidential matters.
- Seen as a member of the management team.
- Ability to deal with non-routine matters.
- Responsible for area maintenance.
- Responsible for equipment maintenance.
- Responsible for maintaining an up-to-date operating manual (which would cover a description of job description/detailed break down of the manager's position/authority limits defined/job parameters, etc.).
- Adhere to company dress code.
- Aware of the public relations implications of tasks.

□ **Senior Secretary/Administrative Secretary**

*Senior administrative assistant/Office manager*

**As for Secretary and including:**

- Works for senior management.
- May have to supervise sub-ordinate staff.
- Holds fort when the manager/s away.
- Should have a minimum of 10 years' experience before promoted to this title.

**Essential characteristics:**

- Avoid behavioural traits that the manager dislikes.
- Have a sense of humour as this can defuse potentially explosive situations.
- Have the obvious secretarial skills - shorthand,

typing and the ability to use the necessary office equipment.

- Be in a position to relate to the manager, the job and the environment and must try to achieve synergy between these for the benefit of the company.
- Be reliable.
- Have an ability to anticipate the needs of the manager in each situation and react accordingly.
- Have initiative. (It is not just initiating a project in the interest of the organisation, but also taking responsibility for completing it/implementing it. Initiative cannot be achieved without a certain amount of responsibility and loyalty. In order to use our initiative, we need a certain degree of freedom).
- Have tact/courtesy.
- Ability to manage time effectively/efficiently.
- Observe confidentiality at all times.
- Present, at all times, a pleasant, smiling, co-operative attitude to all members of staff at whatever level.
- Be pro-active rather than re-active.
- Be a self-starter.
- Be totally committed.

**Essential skills:**

- Management skills: problem solving, decision making, planning and organisation.
- Life skills: common sense, creative thinking, good memory ability to work under pressure, excellent reading/writing/listening skills, ability to ask questions and to clarify options.
- Social skills: tact, politeness, accessibility, assertiveness.
- Personal qualities: integrity, honesty, loyalty, dedication, and willingness to learn.
- Technical skills: word processing, shorthand or some form of taking notes accurately and quickly.

**Prototype Secretarial Job Description**

*Professional Secretaries International (PSI) based its general outline of secretarial assignments and responsibilities on its long-standing definition of a secretary as "an executive assistant who possesses a mastery of office skills, demonstrates the ability to assume responsibility without direct supervision, exercises initiative and judgement, and makes decisions within the scope of assigned authority".*

**In essence a secretary:**

- Relieves the executive of various administrative details.
- Co-ordinates and maintains effective office procedures and efficient work flows.
- Implements policies and procedures set by employer.
- Establishes and maintains harmonious working relationships with superiors, co-workers, sub-ordinates, customers or clients and suppliers.
- Schedules appointments and maintains diary.
- Receives and assists visitors and telephone callers and refers them to executive or appropriate person as circumstances warrant.
- Arranges business itineraries and co-ordinates executive's travel requirements.
- Takes action authorised during executive's absence, uses initiative and judgement to see that matters requiring attention are referred to delegated authority or handled in a manner so as to minimize effect of employer's absence.
- Types material from longhand or rough copy.
- Sorts, reads and annotates incoming mail and documents and attaches appropriate files to facilitate necessary action.
- Determines routing, signatures required and maintains follow up.
- Composes correspondence and reports for own or executive's signature.

- Prepares communication outlines by executive in oral or written directions.
- Researches and abstracts information and supporting data in preparation for meetings, work projects and reports.
- Correlates and edits material submitted by others;
- Organises material which may be presented to executive in draft format.
- Maintains filing and records management system and other office flow procedures.
- Makes arrangements for and co-ordinates conferences and meetings; may serve as recorder of minutes with responsibility for transcription and distribution to participants.
- May supervise or hire other employees.
- May select and/or make recommendations for purchase of supplies and equipment.
- Maintains budget and expense account records.
- Maintains financial records.
- Maintains confidential files.
- Maintains up-to-date procedures manual for the specific duties handled on the job.
- Anticipates problems and peaks in workflow and plans accordingly.
- Organises lunch/dinner functions and on occasion acts as a hostess if required.
- Performs other duties as assigned or as judgement or necessity dictates.

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**Stratum Four**

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**Executive Secretary**

*Executive assistant*

The position generally requires the incumbent to:

**As for Stratum 3, and including:**

- Have knowledge of office automation.
- Have efficient notetaking skills.
- Have excellent communication and conversation skills (which would include knowledge of current affairs).
- Have excellent interpersonal skills.
- Liaise with clients at executive level.
- Have excellent organisational skills.
- Install and control a paper & electronic filing/retrieval system.
- Co-ordinate conferences/seminars and presentations.
- Co-ordinate/schedule meetings.

- Coordinate/arrange lunches and other corporate functions.
- Coordinate/arrange travel arrangements.
- Coordinate diary: paper & electronic.
- Adhere to company dress code.
- Have a thorough knowledge of the company and its competitors.

**Personal Assistant**

*Executive PA*

Some secretaries who reach the highest rung on their career path are not pleased with the title of Personal Assistant and prefer one which refers to their status and not to the fact that they are there as subservient personal assistants to the most senior personnel in the organisation - hence the title Executive PA could constitute a happy compromise. The position generally requires of the incumbent:

**Stratum Four (Continued)**

**All attributes and skills mentioned before, but with the addition of:**

- Coping with the role of being an extension of the Director with the possible right to be spokesperson in the absence of the Director.
- Should have sound knowledge of administration and accounts.
- Should be able to go on business trip to accompany director.
- Should have own typist or Junior Secretary as assistant.
- Should have extensive work experience before being promoted to this position.
- Should attend regular training or do long distance learning courses on subjects of relevance to management.

**Special Note: The secretarial title and boss status combination**

Often in the marketplace one finds that the title

awarded the secretary is dependent on the status of the manager or director (s)he works for, eg. the title executive secretary is customarily given to the person assisting a Managing Director or some such senior executive.

Today, human resources policies tend to assess the job description first before awarding a title - what this means is that the above title of Executive Secretary would be given to the person fulfilling executive secretarial duties regardless of whether (s)he was assisting the Managing Director or a departmental head. This applies to the other titles as well. Hence when devising appropriate career paths for secretaries today, it is important to consider the principle of job description vis-a-vis title and also title vis-a-vis experience and qualifications. The result will be in liberating the secretarial career path from a dependence on the manager's career progress.

**Para-Stratum**

□ **Office Manager**

Information for this title and job description was obtained from: Portfolio of Practical Job Descriptions by M.J. Ramsey, (1993) Alexander Hamilton Institute, USA.

**Position function:**

The Office Manager performs administrative duties which require highly developed secretarial, operational, and supervisory skills. (S)he plans business goals and objectives for the office and identifies and secures the resources (personnel, equipment, capital) needed to accomplish those goals.

Responsibilities include directing and supervising clerical and secretarial personnel, relieving the Director of Administration of routine management functions, conducting department affairs as smoothly and efficiently as possible, hiring and training qualified and capable staff, creating a productive and pleasant work environment.

**Position authority:**

The Office Manager is expected to exercise consid-

erable judgement and initiative in the performance of job responsibilities. Within the guidelines established by company policies and procedures, (s)he is authorised to take any reasonable action necessary to carry out assigned responsibilities. Supervisory authority, in matters relating to hiring, promoting, disciplining, and/or terminating office employees.

**Major duties:**

**Supervisory:** Hires and trains qualified clerical staff. Delegates and monitors work assignments and schedules. Reviews employee job performance and makes disciplinary or commendation recommendations to Director for final approval.

**Administrative:** Sets up operational procedures to maintain a consistent work flow in and out of the department. Coordinates meetings, conferences, and appointments for Director of Administration and notifies participants. Composes and types responses to office correspondence and inquiries. Takes and transcribes dictation. Creates and maintains an effective filing system. Conducts subject research as necessary to complete special projects

**Para-Stratum (Continued)**

and reports. Receives calls and responds to inquiries. Performs other duties as assigned.

**Qualifications:**

Requires extensive knowledge of: Business English, spelling, punctuation, and arithmetic; modern office and record-keeping practices and procedures.

**The Office Manager must be able to:**

- Adhere to prescribed routines and practices.
- Compose effective and accurate correspondence.
- Deal with non-routine matters, such as special projects, with minimum specific instruction.
- Assume responsibility and execute the superior's orders and instructions with authority.
- Provide technical guidance and training to subordinates.
- Work independently in completing assignments.
- Meet and deal with personnel from other departments and the public in an effective manner.

**Training and experience:** Secondary school education including courses in typing and shorthand. Four years of responsible secretarial experience, including some supervisory experience, if possible, or an equivalent combination of related training and experience. Must be able to take oral dictation and type at the prescribed rate of speed, and apply modern secretarial techniques and practices in completing work assignments.

**Performance evaluation:**

Work is reviewed through daily activities, conferences with supervisors, evaluation of completed assignments and projects. Job performance is reviewed based on a number of factors, including, but not limited to:

- The employee's demonstrated supervisory ability.
- Ability to complete work assignments accurately with minimal supervision.
- Effectiveness in relieving supervisor of operational and administrative detail.

**Worth noting:**

This very thorough job description goes one step further than most by outlining how performance will be evaluated. Spelling out criteria for performance review can work to your advantage in two ways by:

1. Defining success on the job. You are directly stating that consistently good or outstanding performance of the duties listed equals success in the job.
2. Giving you a basis for comparison. Employees are judged on whether they meet - or fail to meet - the expectations laid out in the job description. This gives you an objective way to draw distinctions between them. Employees who far exceed expectations can be tapped for advancement.

NB. See overleaf for the IAAP's Profile of the Administrative Professional



*"Risk and reward travel side by side.  
Avoid one, and the other  
will also pass you by."*

Source: Anon



# Profile of The Administrative Professional

by the IAAP

A true administrative professional has most or all of the following qualities...

- Is skilled in new and emerging technology. This includes a strong working knowledge of a wide variety of integrated computer software applications, Internet and Intranet communications and research.
- Acts autonomously. This means having less direct interface with bosses and more with clients and internal departments. Is able to make decisions independently, and manages his/her own work and schedule.
- Provides broader skills beyond the traditional scope of the secretary. Brings greater value to the workplace through skills in such areas as accounting, interviewing, hiring and training, and coordinating activities without side vendors.
- Demonstrates strong interpersonal skills. These can include effective listening, good writing, strong negotiating and oral communication skills.
- Uses educational opportunities provided and finds new ones. Attends relevant educational and training sessions offered by employers or pursues them independently. Never stops learning. Makes like a sponge and learns as much as (s)he can on the job.
- Is flexible. Shifts gears effectively and goes with the flow if things get hectic.
- Gets results. Meets deadlines and always sets personal goals and meets them.
- Takes the initiative. Doesn't wait to be asked to do something. Stays one step ahead of the boss.
- Innovates. Comes up with new, more efficient ways of doing his or her job.
  - Offers assistance, ideas, and recommendations for making things work better in the office.
- Can set priorities with little guidance.
- Can juggle several assignments at once.
- Works well with other employees at all levels and from other departments.
- Asks intelligent questions about the business.
- Participates in group discussions, meetings, work teams - not just as a scribe.
- Thrives with a fair amount of chaos!
- Keeps an open mind. Realizes that what we thought was right yesterday, may not be true today...and vice versa. Is willing to look at new information in a new light to make new decisions to keep fresh and up-to-date.

In short, Administrative Professionals are those who master technology, effectively use their interpersonal and communication skills, who have the ability to track and organize and be creative in solving problems, and most importantly, who have the willingness to learn and grow, and accept challenges.



# Administrative Trends

by the IAAP

Here are a few things to think about. Several years ago, a trend began toward the professionalization of the clerical staff and the clericalization of the professional staff...sort of a role reversal. At a recent on-site visit to Hallmark Cards Inc., based in Kansas City, Missouri (part of a benchmarking study sponsored by Norrell Corp., a staffing firm) staff members of the International Association of Administrative Professionals (IAAP) learned the same thing.

- Managers are doing their own e-mail and voice-mail. It takes up a lot of their time (and will surely get worse) and secretaries lose track of their bosses' schedules, correspondence, etc., so they are more out-of-the-loop.
- Secretaries are more into Internet use, for travel scheduling (making air, car, and hotel reservations and downloading maps of areas visited, etc.), researching, using references, some purchasing, etc. They are the predominant business users.
- Secretaries are getting into web design and updating. When they do, they lose that title and become something else. Nothing fixed at this point on the new title.
- Lots of Intranet use (between facilities). Some companies have only this and not Internet use.
- More managers are doing their own correspondence (composing at the keyboard and actually sending it out), bypassing the secretary. Less work for the secretary, but again, out of the loop and what happens if the manager needs a copy? Guess who will be searching for it.
- Needs to be more education on co-authoring and use of computer networks. More people inside and outside departments are working jointly on projects that bounce back from one to another, each adding, deleting, and changing.
- Secretaries are seen as the final formatters...to make something look good. They import, add graphs, charts, fix margins, select fonts, etc. They will need some graphic design fundamentals. At some point, a document may go to them for making it look "professional" and readable!
- Secretaries are the primary applications users and therefore train their managers. They are also troubleshooters for computer hardware and software problems and the first people managers "in trouble" call on for help.
- Many secretaries have home computers and can be connected with traveling execs 24-hours a day. Good for time zone changes. Can make for long days (and nights) if material is needed. Also...a new fear of corporate data retrieval out of the office with laptops and at-home access (like telecommuters).
- Since many companies are moving to workstations (even for lower managers), computers and add-ons may be the new status symbols. Need to have some policy on who gets what, related to the kind of work done.
- Computers make for better monitoring of at-home workers since you can track log on/off and work done by time.
- Younger managers and younger-generation secretaries are coming in more computer savvy. They often know more than the tenured staff, since they just learned the latest in their school classes.
- People used to complain about not "getting paid for computer skills." Now companies are "paying for results" and not "what you know"...it's more "what you produce." Skills must be related to the job objectives.
- Computer skills can open doors to lateral and other moves. New jobs are coming about because of new computer applications. We may not ever KNOW where the new jobs are...they simply evolve due to software and company needs.
- Filing is done more and more electronically...but workers still procrastinate cleaning up files (moving, deleting, etc.) The world never changes.

**Contact reference for the IAAP on page 47.**

## Profiles of the committee

### Ana-Maria Valente

In the last decade Ana-Maria's name has become synonymous with development in the secretarial profession both in South Africa and overseas. A teacher by profession she was introduced to secretarial training when appointed principal of a large secretarial school. She was invited to the board of the then Executive Secretaries Club, now known as PSA. When she became aware of the critical need for a Professional publication to serve the needs of secretarial students and teachers as well as the members of the secretaries club, it resulted in the creation of CAREER SUCCESS magazine, and with it a whole new career.

Today, as co-owner of Dictum Publishers, Ana-Maria has played a key role in developing other products of educational value to secretaries and office managers. The Secretarial and Office Managers A-Z Desktop Guide; Management - Principles in Practice and the Blueprint For The Secretarial Profession.

### Estelle Fleming

Estelle obtained her National Secretarial Diploma at the Technikon Pretoria in 1993. After completion of her studies she started helping out at an Attorney's firm, namely Rooth & Wessels, as a switchboard operator, receptionist and when she left the firm she was a secretary to one of the associates in the Foreclosure Department.

In 1997 she completed various computer short courses, thereafter she obtained the position as Private Secretary for two Advocates at the Pretoria Bar Council and still enjoys this position.

She is a member of The PSA - The Association for Secretaries and Office Professionals and serves on the Pretoria Chapter Committee and held the portfolio's of Vice-Chairman, Membership Officer and Treasurer during the past 3 years.

### Judy van der Merwe

Judy joined the Liberty Group, age 17 as a Clerk in

1993 and then moved on to a Typist in a Typing Pool. She was offered an opportunity as a Stand-in secretary for 3 months and late in 1993 was offered a position to work for the General Manager IT where she was for 12 Years. She then moved on to work for the CIO where she has been for 6 years. She obtained her CPS in November 1999 and is also the Vice-Chairman of the PSA East Rand Chapter.

Judy is the 2nd Runner up in the National Secretary of the Year 2000/1. She is also a member of various committees within her organisation.

### Lucia Hewitt

She was born in a small town but grew up with a city mentality.

Her career commenced as a Data Capture Clerk in this same small town and within two years she wanted to spread her wings, so re-located to Gauteng where she started as a Girl Friday. From Girl Friday to Receptionist/Secretary, to Secretary to PA all within 8 years. Lucia is very happy with GPNet Managed Healthcare, currently holding the position of Marketing Co-ordinator.

### Miriam Kondowe

Miriam Kondowe is a qualified secretary with 24 years of experience. She has a Merit Secretarial Certificate, Diploma in English for Secretaries, Diploma in Personnel and Management and Certificates in Secretarial Studies. She is currently pursuing a Business Administration Degree with Fair Fax University.

She is a member of the Professional Secretaries Association of South Africa, the National Association of Secretaries and Personal Assistants of Southern Africa and International Association of Administrative Professionals. Currently Miriam is expanding her secretarial training courses to the southern African region.

**Ornella Trinco**

Most people know Ornella as a director of Dictum Publishers, the company that publishes CAREER SUCCESS magazine. What most people don't know is that this Wits graduate with two honours degrees started her career as secretary.

Ornella has played a key role in the development of other publications at Dictum, and today with your CAREER SUCCESS magazine there are regular supplements of reference value: Training, Topics and Speakers; Lawyers and Legal services in South Africa and Eco and Adventure Travel SA

This is because after her secretarial job she attained substantial training and experience in the publishing industry from two publishing house where she soon rose to the ranks of editor.

Today she enjoys being co-owner of a company that specialises and focuses on the needs of secretaries and managers, and an accomplishment she values immensely is being chairperson of The Best Boss Award, an Award which seeks out exemplary bosses and offers the public recognition they deserve.

**René Potgieter**

René started to work as a junior secretary in 1978 and is currently working as Departmental Secretary

for Rand Merchant Bank's External Treasury Solutions department. She started a secretarial club at her previous company and served as Chairman of the club for five years. René has been a member of The PSA - The Association for Secretaries and Office Professionals since 1990.

René has been the Chairman of the National Secretary of the Year competition since 1998 as well as Chairman of the committee submitting editorial to CAREER SUCCESS and Officedigest on a monthly basis. She served as President of the Association during 1999 and was elected as Honorary Life Member of the association in February 2000.

**Susan dos Santos**

Susan started her career at Charter Life Insurance after completing her Secretarial Diploma. She then furthered her career at the Technikon Northern Gauteng Foundation where she has been for the last 10 years.

She completed a Certificate in Marketing & Marketing Research with UNISA and achieved the Certified Professional Secretary Certification in 1999. She is a member of the Johannesburg Chapter Committee of The PSA, The Association for Secretaries and Office Professionals and currently holds the CPS Representative Portfolio.



*"We make a living by what we get,  
but we make a life by what we give."*

—Norman MacEwan

## Acknowledgements

CAREER SUCCESS Magazine, on behalf of Dictum Publishers (Pty) Ltd, wishes to thank the various people and organisations who supported the wording and writing of this Blueprint committee by furnishing relevant information required for the compilation of the various chapters.

And on a note of deep appreciation to the two sponsors. Avery Dennison and Telkom Business Services for their sponsorship of this publication.

We are proud that these two organisations have invested in the development of this profession and wish to associate themselves with its growing status and importance.

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