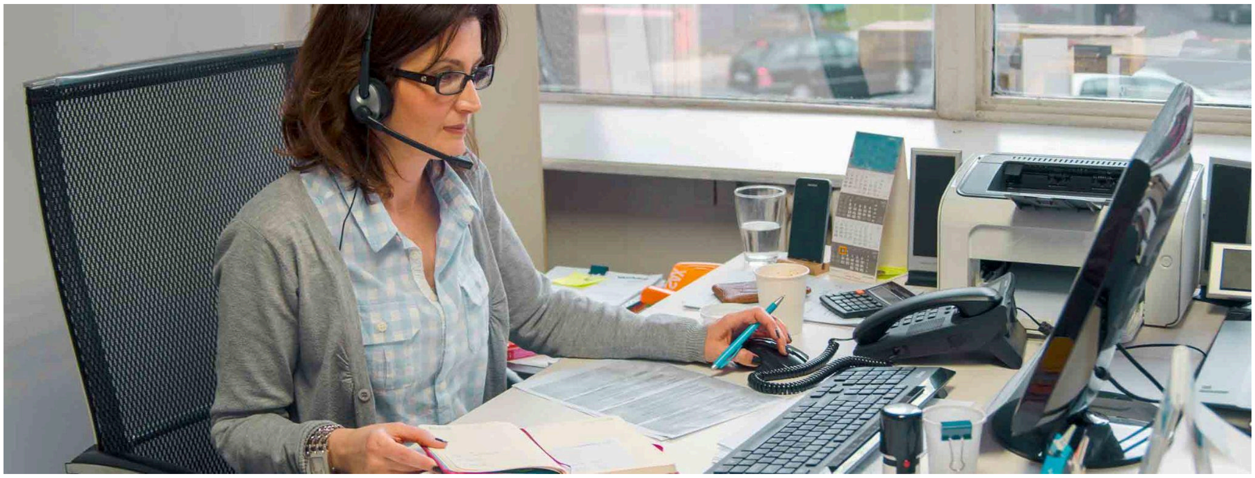
The Busy Office Professional's Handbook



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The *Busy Office Professionals Handbook* BYU-Idaho Edition – Revised 1/05/2024

The *Busy Office Professionals Handbook* was created at BYU-Idaho under the direction of the business faculty. It incorporates the best information known based on research with principles taught in the Church of Jesus Christ of Latter-day Saints. Best efforts have been made to integrate the Gospel and research to help students make optimal choices.

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Chapter/Week 1 Understanding the Office

Working on the concepts we will study and applying them into your life is going to take active effort. Becoming a professional is not something that happens automatically. You must be engaged; you need to learn the ropes; but most importantly, you need to go and do! Business is a great subject. There are a multitude of ways to see and react to issues and situations. So any concerns you might have about your place here in our course should be laid to rest—you'll do just fine.

Optional Reading: "Do What They Think You Can't Do" by Henry B. Eyring

Daily Skills

Zig Ziglar said, "being *your* best is more important than being *the* best."

First Impressions

Professional Dress: First impressions count. How you appear for the first day on the job may affect how your colleagues treat you. If you are unsure of the dress code for the first day on a new job, try dress pants, and a button shirt. Once on the job, look around and see how your colleagues dress. Some companies have a dress code such as uniforms for police officers.

Speech: First impressions count in your speech as well as your dress. How you pronounce the words you say can enhance or undermine the substance of what you say. Incorrect pronunciation reflects poorly on one's intelligence and ability. As unfair as this judgment sounds, it is still a reality. Slang pronunciations are not preferred by business standards ('hello' instead of 'yo'). Google has a speaker icon next to words so you may hear the correct pronunciation while also checking to make sure the word means what you think it does.

Timeliness: Being on time is a very important trait for a professional. This means being at your desk or station at your start time ready to work. It also means that you have any assigned tasks completed and delivered by the promised time.

The Secretaries and Administrative Assistants Career Video will help you understand what it means to be an administrative assistant.

Duties: Your role as administrative assistant is to provide assistance to your employer, handling many of the daily routine activities in the office so your employer may focus on higher-stakes activities to keep the company running. Administrative assistants may only handle a few related tasks or may handle dozens of unrelated tasks such as accounting, billing, customer service, email, filing, mail delivery, purchasing, and m[1]ore. You may report to one person, or you may have many people that you perform tasks for. When you work as a team with your employer, a good administrative assistant will learn to anticipate what the employer needs even before they ask.

Typing Speed: The typing needs of every office may be different, however, it is a skill worth developing. A typing speed of 50 words per minute (wpm) is considered a base level speed for most office jobs. It is possible for a position to require 80+ wpm. Typing speed equates to the amount of work an employee can produce. If an employer has 2 potential employees and one types 50 wpm and the other types 10 wpm, which will they choose? The 50 wpm employee can produce 5 times the work as the 10 wpm employee.

To increase your typing speed takes practice. There are a lot of free online typing programs that will help you increase your typing speed and accuracy. There are also free typing programs that you can download and practice offline. If all else fails, you can practice typing anything such as your scriptures or journal entries, as long as you practice correct techniques (such as using a qwerty keyboard not a phone). If you practice 10 minutes a day, 5 days a week, you will increase your wpm much more than if you attempt to only practice once a week for 50 minutes. Practicing each day is similar to eating each day. You can't just eat all your meals on one day of the week so don't try to save your typing practice for one day.

Expectations: While each employer may have different expectations, there are a few expectations most employers have in common such as the ability to learn and follow instructions, dependability, good communication skills both in person and in writing, loyalty, and punctuality.

Know your Company: You are often the first face of your company. To protect the image of your business, you must first spend some time getting to know all about the business. You must look beyond the job you are required to do and keep up to date of the company happenings and project an image that shows you make a valuable contribution to the company. Knowing about your company allows you to leave the impression that you are knowledgeable and are a source of reliable information. Learn as much as possible and stay informed about your company's progress.

Hard Skills: Hard skills are also known as technical skills. Knowing how to file, type, use office equipment or software are hard skills anyone can learn. Other technical skills are locating and managing resources or information. You will need to work effectively within social,

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organizational and technological systems, which may include improving or updating a procedure to save the company time and money.

Soft Skills: An administrative assistant needs a number of soft skills as well. Confidentiality is one such soft skill, knowing how to keep confidential information confidential. Your employer may not always explicitly state when something is confidential. As good teamwork develops between you and your employer, a type of synergy will develop and the understanding of each will increase and hence success on the job. Emotional intelligence is another soft skill and very important when dealing with clients, customers, and stakeholders. No matter how frustrating a colleague or customer becomes, you must always be courteous as you are representing your employer and the company.

Feedback: As soon as you are employed, your goal will shift from getting a job to keeping the job. Most companies have policies about evaluating an employee's performance. Completing an evaluation or performance appraisal allows for opportunities for you and your supervisor to discuss your past accomplishments and areas for improvement. During the meeting, you will receive feedback. Feedback is not merely an opinion, but information given or received as a basis for improvement. When you receive feedback from a supervisor (or an instructor) on an assignment, it is to know how to do better next time. When you give or receive feedback at work, it needs to be constructive, leading to an improved performance, product, or service. Feedback should do the following:

1. Focus on the behavior or product, not the person. For example, the workmanship is poor, not, you are a poor worker.
2. Indicate the positive as well as the negative. For example, the formatting of the letter is correct, however, the capitalizations need corrections.
3. Avoid using the phrases *always, never, everyone,* and *no one*.
4. Guide the goal setting process for continued growth.

The Office

David A. Bednar said, "ordinary people who faithfully, diligently, and consistently do simple things that are right before God will bring forth extraordinary results."

There are hundreds of different office conditions in which you may work. You may work for one entrepreneur in a small home office, a small doctor's office where you will be the only administrative assistant working for a couple of doctors, or a large firm in multiple countries with many administrative assistants with specialized tasks. Any office condition you currently work in may change as the company grows or shrinks depending on the global economy.

Workstation: A workspace will most likely be provided for you. Just as the office conditions may vary over time, so could your work area. You may work on a small laptop in a home office, a desktop at a front counter, or a series of computers in a cubicle or at a desk. You may have your own office where you can shut the door and block out disruptions or you may have a workstation in an open area with hundreds of other employees. Regardless of the location of the workstation, you should be able to organize your workspace for your optimal performance. You should have appropriate lighting to see without squinting. It is also advised not to have your phone and computer cords near your feet where you may step on them and accidentally pull them out of their power sockets or cause a tripping hazard.

Ergonomics: Ergonomics is a way of designing office equipment, such as desks and chairs, for maximum efficiency. However, ergonomics can also define your workspace and your work environment. For example, ergonomics encourages taking a short break every hour to reduce eye strain from the computer and to circulate the blood flow in your legs. This break can be as short as 30 seconds or as long as five minutes and could consist of simply walking to the drinking fountain. Other ways to take a break from sitting at a desk include standing up while taking a phone call, going to the copier machine to make copies, talking to a colleague while walking the hallway or up a flight of stairs. Your eyes also need a break from looking at a computer screen, so schedule time throughout the day to file paper documents, read paper reports, or sort the mail. Paying attention to discomfort will help you make adjustments which will increase your comfort level. For example, if the back of your knees hurt, it could be your chair seat is too deep for the length of your legs or it could be your chair is too high or too low from the floor to allow your feet to rest comfortably. Small adjustments can make a huge improvement in the comfort level of your physical work environment which will in turn increase your productivity. Rough estimates say the monitor should be 18 inches from your eyes and your eyes should be level with the top two inches of the monitor. Chair, desk, keyboard, lighting, monitor, and mouse are just a few of the items where you can make adjustments to increase your comfort level. Google ergonomic office set-up for other ideas to create the most effective workspace for you.

Computer: You will need a computer to fulfill your work responsibilities. You may be provided a Mac or a PC. You may be provided a desktop or laptop. You may have your own computer or you may have to share with another employee on a different work schedule (for example, you work 8:00 a.m. to 2:00 p.m. and the other employee works 2:00 p.m. to 8:00 p.m.). Along with a computer to do your work, you will need various software such as Microsoft Word and access to the internet. Find out from your employer if the computer or the cloud is where your work is to be saved.

Supplies: You may need to ask where the printer, filing cabinets, and office supplies are stored. Depending on your duties as administrative assistant, you may be responsible for ordering office supplies. Office supplies might be as simple as pens and paper, or more technical, like copier cartridges or printer toner. Depending on your office location, you may order supplies in person, over the phone, or using the internet. Many companies will offer you better prices if you buy in bulk. Buying in bulk may make sense for some items such as pens and paper if you have adequate storage facilities. However, other supplies, such as printer toner, may not have a long shelf life and you may update your printer before you use up your stock of toner. Keeping an inventory of office supplies may also fall under your job duties, so you will want a system to know when it is time to order various supplies. If you are in charge of supplies and you have a closet or cabinet to keep the supplies, here are a few tips:

1. Keep liquids on the bottom shelf (if they spill, they won't ruin the other supplies).
2. Items used most often should be kept at eye level.
3. Label the shelves where supplies are kept.
4. Only open reams of paper on one end and keep the packaging intact so you and your fellow employees know which paper is which. There are different types and weights of paper for copiers and printers. For example, most printers use 20 pound paper instead of cardstock.
5. Have a process for special orders that fall outside the normal stocked supplies.

Ethics: Ethics is defined as a person's motivation based on his or her ideas of right or wrong. A code of ethics or code of business conduct is a set of acknowledged rules governing all members of an organization. If your employer pays you to work from 8:00 a.m. to 4:00 p.m. Monday through Friday, then you should be doing company work during this time, not checking your personal email account or surfing the web. One way to test if your activity on the computer is ethical or not is to compare the activity with the use of the company vehicle. After all, the company computer and company vehicle both belong to the company, not to you. For example, if it is wrong to borrow the company vehicle without asking, then don't borrow the company laptop without asking. If it is wrong for your children to drive the company vehicle, then your children should not use the company computer. If it is wrong to fill up your personal car with gas and charge it to the company's credit card, don't charge your internet use to the company.

Deciding ethical issues is not easy. To help you decide what is ethical, ask yourself questions such as is the action legal? How would you feel if you were in the other party's shoes? How would you feel if you saw the details of the action in a headline or news story? Would it help to talk to someone else about the issue or to determine new alternatives? How would you feel if your family or friends learned about your action?

Daily Routine
"Yea, I know that I am nothing; as to my strength I am weak; therefore I will not boast of myself, but I will boast of my God, for in his strength I can do all things; yea, behold, many mighty miracles we have wrought in this land, for which we will praise his name forever" (Alma 26:12).

Routine: Set time to check and respond to emails and voicemails, process post mail, sign for courier packages (so, you must know what times couriers come each day), and clean up your workspace before you leave.

It is recommended to look at your calendar for the next day before going home each day. If you have an 8:00 a.m. meeting, you will want to make sure the agenda is ready the day before. You will want to look at the calendar each morning to prioritize your day and the tasks waiting for you. A daily To Do list is a great way to prioritize and you will learn more about this in the Calendar section.

Until you know your regular routine, keep a small notebook and pen with you at all times to write down instructions as tasks are given to you. Writing tasks down will help you remember all the tasks, especially if your employer gives you more than one task at a time, or if you have multiple employers giving you tasks. Writing the tasks down allows you to reference the list later as needed. Some may tell you to take notes on a laptop, and as most people can type faster than they can write, typing notes for a meeting makes sense. However, the brain makes neural connections when handwriting with pen or pencil and paper, so, for tasks you need to learn as part of your daily routine, it is suggested to handwrite directions and instructions for tasks.

You may have an employer who wants to meet with you each morning and run down your lists of tasks for the day. Having a notebook will ensure you capture each task, spell names correctly, and get all the required details. Do not hesitate to interrupt your employer for clarification such as how to spell a name (Smith or Smythe). It is better to be accurate than to guess. Most employers will appreciate you asking for clarification rather than doing the task wrong.

Dictation: Some employers will dictate letters into a digital recorder for you to transcribe at a later date. Most smartphones have apps you can download to digitally record. People talk at a speed of over 100 words per minute and most people only type 60 words per minute. When you are listening to a recording to transcribe, you will generally only listen to a minute at a time. Expect it to take three listenings to complete a transcription. The first time is to type the document. The second time is to review the document for accuracy and completeness. The third time is to ensure correctness of punctuation (which is usually not dictated, so you have to determine where the commas and periods go based on inflection in tone in the recordings.)

Always use proper English conventions (capitalization, grammar, punctuation, and spelling) when preparing written documents.

Inefficient ways to spend your workday	Effective ways to spend your workday
Trying to find things. This applies to anything you use to do your work: computer files, products you make or sell, supplies, tools, etc.	Take the time to **organize** as you do your work. Create a system that can easily be followed by others. 70% of your time should be spent accomplishing the work (not organizing).
Poor Communication. Visits to co-worker's offices can often turn into lengthy discussions.	A simple email to everyone only takes a few minutes. Share your calendar with each other to simplify scheduling meetings.
Unnecessary meetings. Sometimes meetings are the best way for everyone to voice their opinions and arrive at a consensus but sometimes meetings are inefficient.	**Schedule shorter meetings** so the tendency to pontificate is removed.
As **disciples of Christ,** we owe it to our employers to be **honest and productive** regarding the **time** we spend at work.	

Record Keeping

"Organize yourselves; prepare every needful thing; and establish a house, even a house of prayer, a house of fasting, a house of faith, a house of learning, a house of glory, a house of order, a house of God" (D&C 88:119).

Case Study
Katarina was a very conscientious office manager in an accounting firm. Here is her story:
I went to the file system to find a specific client's paperwork. I was not able to find it. Panic started to set in when I realized that the file, which contains sensitive personal and financial information, was not accidentally misfiled. I always put documents back in the file cabinet after using them and demand the same from all the office staff. We do not have files stacked up

on desks. Our rule is that if you are actively working with a file, you sign it out, and then it gets put back before moving on to a different client. This is very important so that paperwork from one client has no chance to get in the wrong file. Going through all the offices looking for the file yielded no results. Additionally, it had not been signed out for several months. The only other people with access to the documents were colleagues. My stomach started to turn when I realized that we may have been a victim of employee theft. We immediately began a file audit and found that there were a total of 25 client files not in the file cabinet. I attributed it to a recently fired employee. I don't know if she stole the files or shredded them in anger. It was a huge issue and we are currently working to tighten and check our processes to make it more difficult to access files.

Keeping Accurate Records

Keeping accurate records includes everything from accounting, billing, customer service complaints, emails, expenses, files, minutes, supplies, and more. These items may be digitally, electronically, or paper stored. Some of these items may be your direct responsibility and other items may be another employee's responsibility, however, everyone plays a role in protecting the organization's records and information.

Categories of Records

1. Vital—these records are essential to the operation of the organization, or to the continuation of operations. Financial, legal, statutory requirements, property, copyright, insurance, tax or other records are vital and need the highest protection.
2. Important—these records are meaningful to the business operation, but are limited in the amount of time they must be retained. Customer and inventory records often fall in the important category.
3. Useful—these records are used to conduct the daily business operations. These documents are those such as correspondence and reports that are often kept on-site in paper or electronic format.
4. Nonessential—these records are not needed beyond their current use and should be discarded after their purpose has been fulfilled. Nonessential records examples are notices of staff meetings, duplicate copies of correspondence, and requests for supplies. These documents cost money, space, and employee time if kept beyond their use.

Backup: Natural events such as fires, floods, hurricanes, and lightning can wreak havoc on filing systems. Electrical outages or surges can crash a computer system. As there are many threats to your data, having multiple storage sites or a backup of the data is recommended. Good disaster recovery involves asking the following questions before a disaster occurs:

1. Where is the backup computer, data, and storage?

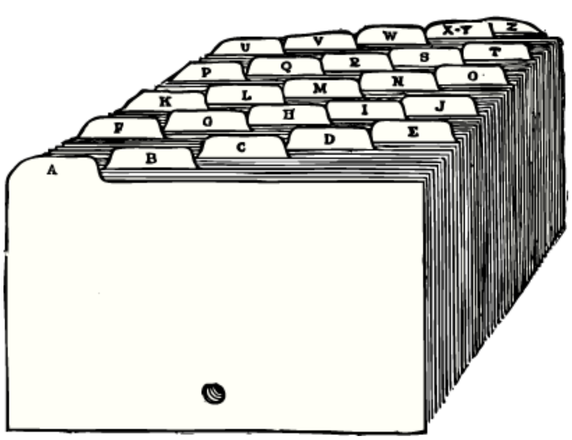
2. What is the protocol in the event of a disaster?
3. What projects have priority?
4. What are the insurance company's requirements in the event of a disaster?

Documentation: Accounting, billing, expenses, and statements all deal with numbers. Agendas, minutes, and reports all deal with words. All documentation must be kept accurately. If a bill is $10, you don't want to send a $100 payment. A customer's last name may be spelled Smythe not Smith. If the minutes state something will be done June 10, you don't want to type July 10. In all three examples above, you can see how just one or two typos could cause harm to the company. Details in documentation are critically important.

Files: A file is a single document. Folders hold and organize many files. You may have one file cabinet for storing important files or you may have an entire room dedicated to file storage. Your responsibility may include ensuring everything is stored in its proper location, checking out files to fellow employees, and ensuring the files are returned in a timely manner and correctly re-filed. Filing correctly may look different in different organizations or with different types of documents. Files may be stored alphabetically, numerically, geographically, or according to subject. Certain contracts and documentation may need to be kept together by job. For example, a construction company with three different job sites and multiple vendors may want to keep each piece of documentation related to the same job site together, or they may want to keep all vendor contracts together regardless of the job site. Libraries use the Dewey Decimal system to file their books and a different system to track all their income and expenses. All of the ways to keep a file system are legitimate as long as everyone in the organization follows the same system. You need to know the way your company handles its filing system in order to maintain it accurately. Ask your employer for the preferred filing system.

If you only have one file cabinet, your file system may be fairly simple. If you have an entire room full of filing cabinets, you may need to keep an index system of the file system on your desk to know who has checked out files, the date the files should be returned, and where the files should be stored. The index system will help with cross-referencing files which could be filed in multiple places so everyone knows the correct file location.

When using file folders in a drawer it is helpful to stagger the file tabs as seen in the image below.



James N. McCord at Wikimedia. Public Domain.

Labeling files should be consistent. If your company uses the alphabetical system, do they use full first names or just initials? For example, is Tim Tanner filed as Tanner, Tim, or Tanner, T? Use a consistent system for all file labels for accuracy and ease of finding correct files. If your company files by dates, determine if they file by month or year first and if they use letters or numbers. For example October 20, 2020; 2020 October 20; 10202020; or 20201020. If using numbers for dates, what is the designation to separate month, day, and year? The following is an example: 2020.10.20, or 2020 10 20, or 2020-10-20.

When one folder has multiple documents contained within, the papers should be kept in chronological order with the most current item in front. When there is more documentation than a single folder can contain, it is recommended to create multiple files but to separate them based on a system such as time. For example, if there is a lot of documentation for Tim Tanner, it could be separated in folders by years such as Tanner 2017, Tanner 2018, Tanner 2019, Tanner 2020.

Though staples and paper clips are necessary in keeping documents together they can also hook to the wrong document. Always check batches of paper to make sure all papers stapled or paperclipped together actually belong together. Check to make sure all papers attached belong together.

Electronic files

When using an electronic system, it is smart to use a document library. If your computer operating system uses Windows, you will already have a folder labeled Documents. Within this folder will be other folders labeled music, pictures, videos. It may make sense to use this system. It may not make sense to store pictures and videos separately. If you use an alphabetical paper system, it may make sense to use an alphabetical electronic system and have a folder labeled with each letter of the alphabet. When using an electronic file system, use consistent file names the same as you would for paper files. Once you have more than 30 files in a single folder, you may want to look at creating a sub-folder.

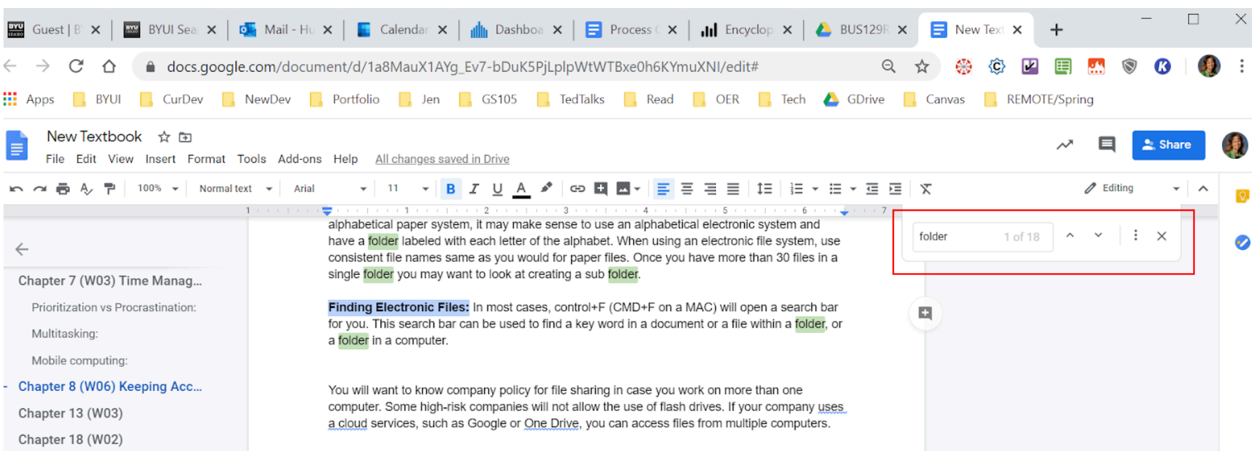
You will want to know company policy for file sharing in case you work on more than one computer. Some high-risk companies will not allow the use of flash drives. If your company uses cloud services, such as Google or OneDrive, you can access files from multiple computers.

A suggestion for electronic filing is to keep current documents separated from past documents. For example, all projects completed could be in a folder labeled Completed with subfolders for years or projects based on your filing system.
Another suggestion for electronic filing is to **not** keep documents on your desktop. This contradicts a filing system. Placing a shortcut to a file you use often on the desktop, such as a template, is an acceptable practice.

A third suggestion for electronic files is backing all files up weekly. Ask your employer how this is to be done for security purposes. They may have an off-site server or cloud access.

Finding Electronic Files: In most cases, control+F (command+F on a Mac) will open a search bar for you. This search bar can be used to find a key word in a document or a file within a folder, or a folder in a computer.

Search Bar looks like the image below in a Google doc:



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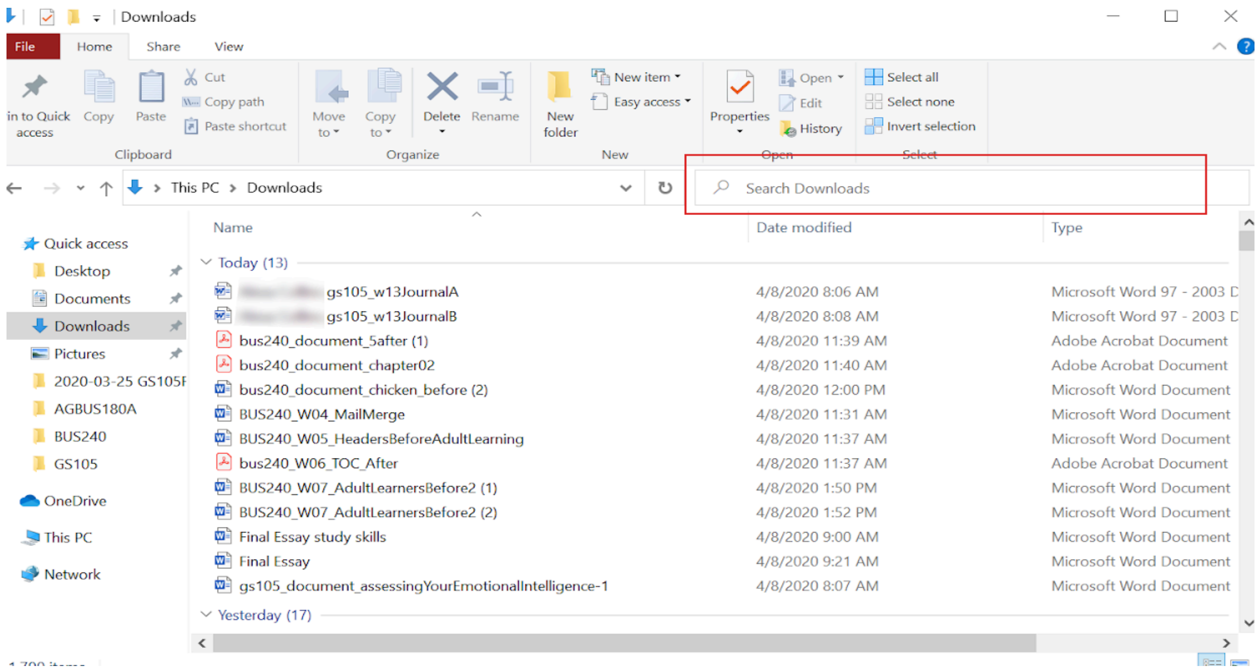
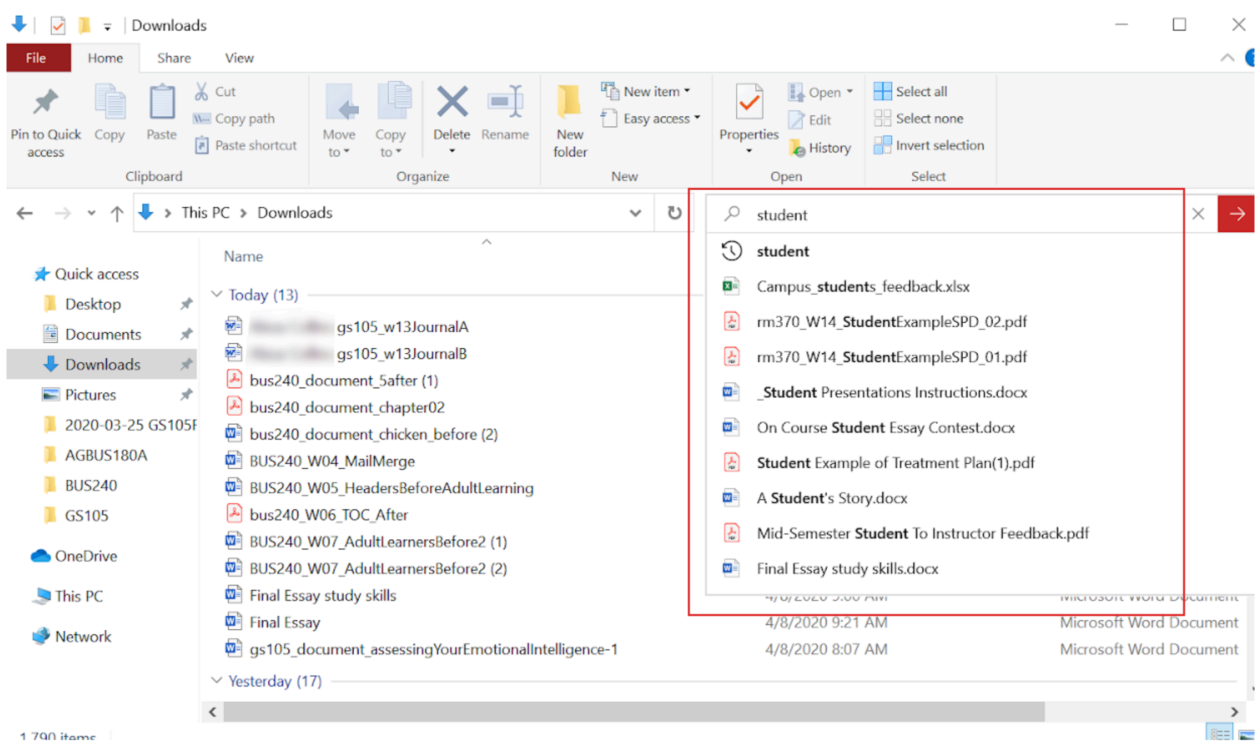
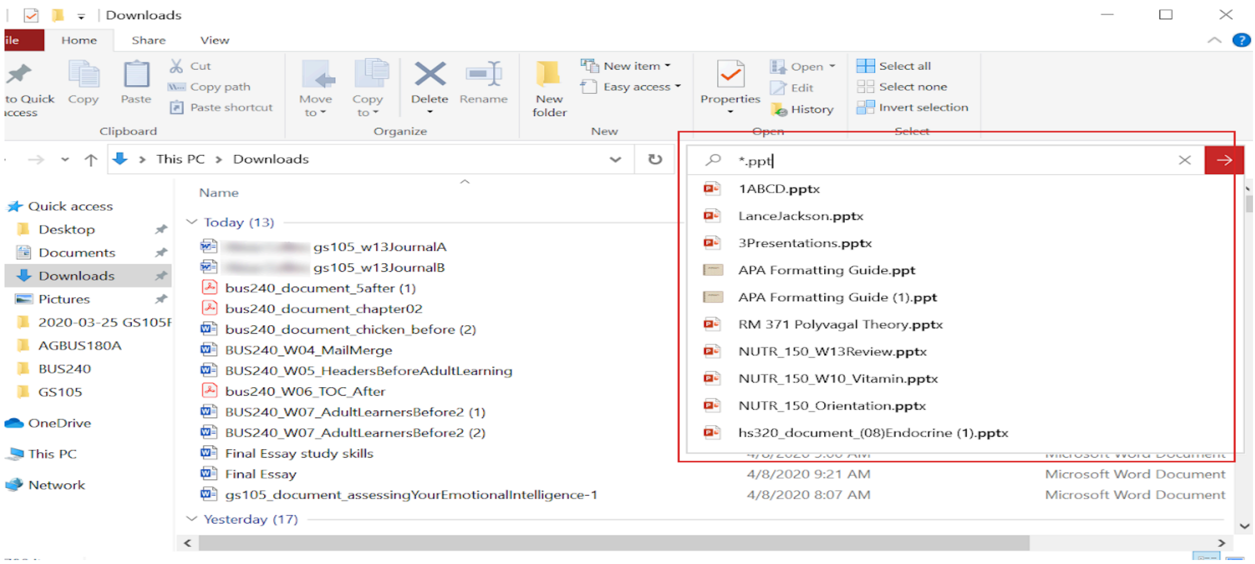
Search Bar looks like the image below on a desktop computer or laptop.



Search Bar will show you all the documents with the key word you searched as seen in the image below.



Wildcard: Wildcard allows you to find a file, folder, or application using part of a name with the use of an asterisk (*). If you don't know the name of the file, but you know it is a PowerPoint you can search using *.PPT. This tells the search function to find all PowerPoint files as depicted in the image below.



12 Rules for Filing

Optional Videos: Watching the videos below will give you additional information on filing and record keeping.

- [Creating the Right Filing System for Your Office]
- [Introduction to Records Management]

Indexing

When preparing to file, the first step is to index the paperwork, files, or folders. Indexing breaks the name, business, or document into their individual parts in the order the file will be alphabetized. After indexing, you then have to make sure you place the files in the correct order alphabetically. The following are the accepted Association of Records Managers and Administrators (ARMA) rules of filing.

Learn each of the twelve rules of filing. Each rule is indexed in a chart, and then there are practice names to practice the rule. After you work through the practices, see Appendix C to check your work.

You will have an assignment in Canvas that will combine all the rules.

Rule 1: Names of Individuals

When indexing the name of an individual, arrange the units in this order: last name as Unit 1, first name or initial as Unit 2, and middle name or initial as Unit 3. When two names in Unit 1 begin with the same letter, you consider the next or second letter to arrange things in alphabetical order. If both the first and second letters are the same, consider the third letter, and so on until the letters are different. A unit consisting of just an initial precedes a unit that consists of a complete name beginning with the same letter. Punctuation, such as a period or an apostrophe, is omitted.

NAME	UNIT 1	UNIT 2	UNIT 3
Rebecca P. Allens	ALLENS	REBECCA	P
Susan B. Andrews	ANDREWS	SUSAN	B
Terri Andrews	ANDREWS	TERRI	
William Ken Aoettsche	AOETTSCHE	WILLIAM	Ken
William Harward	HARWARD	WILLIAM	
Frank Sheepworth	SHEEPWORTH	FRANK	
Frank B. Sheepworth	SHEEPWORTH	FRANK	B
Debbie Shriver	SHRIVER	DEBBIE	
Ann Marie Watson	WATSON	ANN	MARIE
Anna Watson	WATSON	ANNA	
David Wilson	WILSON	DAVID	

Practice Rule 1

Name	Index Practice	Alphabetize with 1 starting at the beginning and 5 at the end

Victory Anderson		
Debbie Southern		
Christian Soother		
Vicki A. Anderson		
William Southerly		

Rule 2: Personal Names with Prefixes

Prefixes, such as *Mc* in *McAdams,* is considered a part of the name it precedes. Ignore any apostrophe or space that may appear within or after the prefix. Commonly used prefixes are *a, la, d' D' de, De, Del, De la, Di, Du, El, Fitz, La, Le, Lo, Los, M', Mac, Mc, O', Saint, St., Ste., Te, Ter, Van, Van de, Van der, Von,* and *Von der*.

NAME	UNIT 1	UNIT 2	UNIT 3
Olivia DuBean	DUBEAN	OLIVIA	
Paul Dubean	DUBEAN	PAUL	
Anna L'Agnese	LAGNESE	ANNA	
Chuck B. Lanning	LANNING	CHUCK	B
Jerry A. McDougal	MCDOUGAL	JERRY	A
Terri C. Mcdougal	MCDOUGAL	TERRI	C
Celeste Von Bagen	VONBAGEN	CELESTE	

John Vonbagen	VONBAGEN	JOHN	

Practice Rule 2:

Name	Index Practice	Alphabetize with 1 starting at the beginning and 5 at the end
Elise Van Der Hoff		
Kelli O'Neal		
Jack O'Clay		
Cynthia Van Metry		
Charles VanMetry		

Rule 3: Hyphenated Personal Names

Consider a hyphenated first, middle, or last name as one unit. Do not include the hyphen in the unit name.

NAME	UNIT 1	UNIT 2	UNIT 3
Valerie Andrews-Dyke	ANDREWSDYKE	VALERIE	
Jason DuPont	DUPONT	JASON	
Tammy DuPont-Johnson	DUPONTJOHNSON	TAMMY	
Gary Samuel Lucas	LUCAS	GARY	SAMUEL
Alison Samuel-Lucas	SAMUELLUCAS	ALLISON	
Katie-Lynn C. Shuttle	SHUTTLE	KATIELYNN	C

Practice Rule 3:

Name	Index Practice	Alphabetize with 1 starting at the beginning and 6 at the end
Kim Wang		
Shelly-Lee Ackerman		
Gina James-Ackerman		
Jackie Everson		
Angela-Marie D'Everson		
Kim Wang-Lu		

Rule 4: Single Letters and Abbreviations of Personal Names

Initials in personal names (J.D., A.J.) are considered separate indexing units. Abbreviations of personal names (Wm., Jos.) and nicknames (Bill, Rick, Ali) are indexed as they are written.

NAME	UNIT 1	UNIT 2	UNIT 3
B. A. Anderson	ANDERSON	B	A
Lana Billings	BILLINGS	LANA	
Lucy Billings-Chandler	BILLINGSCHANDLER	LUCY	
Rbt. Danielson	DANIELSON	RBT	
K. C. Sampson	SAMPSON	K	C

Karl H. Vickory	VICKORY	Karl	H

Practice Rule 4:

Name	Index Practice	Alphabetize with 1 starting at the beginning and 6 at the end
B.J. Christensen		
J.O. McVey		
K.T. Banks		
Lou May-Vickers		
Joe McVey		
Ben J. Christensen		

Rule 5: Personal Names with Titles and Suffixes

When used with a person's name, a title or a suffix is the last indexing unit needed to distinguish between two or more identical names. A title appears before a name (Capt., Dr., Miss, Mr., Mrs., Ms., Prof., Sgt.). Suffixes appear after a name and include seniority terms (II, III, Jr., Sr.) and professional designations (CPA, CRM, CMA, MD, Ph.D.). Some terms may appear either before or after the name (Senator, Mayor). If a name contains both a title and a suffix, the title is the last unit.

Royal and religious titles (King, Queen, Prince, Princess, Father, Sister) are considered professional designation suffixes unless they are followed by either a given name or a surname only (Father John, Princess Anna) in which case, they are indexed as written.

NAME	UNIT 1	UNIT 2	UNIT 3
Susan Bilderson, CMA	BILDERSON	SUSAN	CMA
Sister Gomez	SISTER	GOMEZ	

Mr. Adam Jacks	JACKS	ADAM	MR
Queen Jane	QUEEN	JANE	
Mrs. Julie Lindstrom	LINDSTROM	JULIE	MRS
Ms. Julie Lindstrom	LINDSTROM	JULIE	MS
Father Martin Sims	SIMS	MARTIN	FATHER
Paul C Tisdale II	TISDALE	PAUL	II
Mr. Jacob Wadsworth, Jr.	WADSWORTH	JACOB	Jr
Dr. Hank Wilbarston	WILBARSTON	HANK	DR

Practice Rule 5:

Name	Index Practice	Alphabetize with 1 starting at the beginning and 6 at the end
Jeffrey A. Quinley, III		
Ms. Katrina Chance		
Senator Jack Rigley		
Prince Phillip III		
Mrs. Katrina Chance, CPA		
Dr. Jack Rigley		

Rule 6: Names of Businesses and Organizations

Business names are indexed as written using the letterhead or trademark as a guide. If the letterhead is not available, use sources such as directories (phone, internet) and advertisements.

Each word in a business name is a separate unit. Exception: When *the* is the first word of the business name, it is treated as the last unit. Business names containing personal names are indexed as written. Hyphenated names and names with prefixes are considered one unit.

NAME	UNIT 1	UNIT 2	UNIT 3	UNIT 4
Bella Ella Boutique	BELLA	ELLA	BOUTIQUE	
Burlington Coat Factory	BURLINGTON	COAT	FACTORY	
Cakes and Such	CAKES	AND	SUCH	
Cakes Are Here	CAKES	ARE	HERE	
Cpt. Carter's Crawfish	CPT	CARTERS	CRAWFISH	
Devin's Dental Care	DEVINS	DENTAL	CARE	
Dr. Paulson's Car Repair	DR	PAULSONS	CAR	REPAIR
El Dorado Financing	ELDORADO	FINANCING		
EQL Tea Time	EQL	TEA	TIME	
St. Andrews Senior Care	STANDREWS	SENIOR	CARE	
The Xylophone Dream Company	XYLOPHONE	DREAM	COMPANY	THE
Zelda Hubert Weekly Podcast	ZELDA	HUBERT	WEEKLY	PODCAST

Practice Rule 6:

Name	Index Practice	Alphabetize with 1 starting at the beginning and 6 at the end
The Paris Daily News		
South-West Lawn Care		
Camino’s Clothing Accessories		
The El Camino Horse Club		
Dr. Betty Johnson Elementary School		
The Southwest’s Lawn Care		

Rule 7: Letters and Abbreviations in Business and Organization Names

Single letters in business and organization names are indexed as written. If single letters are separated by spaces, index each letter as a separate unit. An acronym (word formed from the first few letters of several words, such as ARMA and F.I.C.A,) is indexed as one unit regardless of punctuation or spacing.

Abbreviated words (Mfg, Co., Corp., Inc.) and names (IBM, GE) are indexed as written and as one unit regardless of punctuation or spacing. Radio and television station call letters (WBCO, ABC) are also indexed as written and as one unit.

NAME	UNIT 1	UNIT 2	UNIT 3	UNIT 4
A B C Farming	A	B	FARMING	
B OK Imaging	B	OK	IMAGING	

Ben's Auto Co.	BENS	AUTO	CO	
CCKO Monitoring Systems	CCKO	MONITORING	SYSTEMS	
L A N Refineries	L	A	N	REFINERIES
TAM, Inc	TAM	INC		
Outlander Mfg. Corp.	OUTLANDER	MFG	CORP	
US Towns	US	TOWNS		
USA Tomorrow	USA	TOMORROW		

Practice Rule 7:

Name	Index Practice	Alphabetize with 1 starting at the beginning and 6 at the end
P J Golf Course		
CA Carpets Ltd.		
Garner and Garner, Attys.		
C K W Towing		
GTE Electric Co.		
PJG Manufacturing		

Rule 8: Punctuation and Possessives in Business and Organization Names

All punctuation is ignored when indexing business and organization names. Commas, periods, hyphens, apostrophes, dashes, exclamation points, question marks, quotation marks, and diagonals (/) are disregarded and names are indexed as written.

NAME	UNIT 1	UNIT 2	UNIT 3	UNIT 4
Ageless-Skin-Tanning Beauty Salon	AGELESSSKINTANNING	BEAUTY	SALON	
Bill's Pick-a-Pet	BILLS	PICKAPET		
The Canary's Branch	CANARYS	BRANCH	THE	
How Far? Travel Store	HOW	FAR	TRAVEL	STORE
Indoor/Outdoor Furniture	INDOOROUTDOOR	FURNITURE		
Jane-N-John Hosting	JANENJOHN	HOSTING		
The Salt!	SALT	THE		

Practice Rule 8:

Name	Index Practice	Alphabetize with 1 starting at the beginning and 6 at the end
Nor-East Import’s		
Do-Rite Medical Supplies		
The On/Off Freeway Café		
Nell-Carter Law Firm		

A-OK Repair Service		
North-East Import’s		

Rule 9: Numbers in Business and Organization Names

Arabic numbers written in digits (1, 15, 189) and Roman numerals (II, IV, IX) are considered one unit, and are filed in numeric order before alphabetic characters. Arabic numbers precede Roman numerals (2, 156, III, XIV). Numbers spelled out (ONE, TWELVE, FORTY) are filed alphabetically and appear after numbers written in digits or Roman numerals. Names with numbers are filed in ascending order (lowest to highest number) before alphabetic names (B4 SHOP, B12 VITAMIN CLUB, BATTING A THOUSAND SPORTING GOODS). Names with numbers appearing in places other than the first unit, are filed alphabetically and immediately before a similar name without a number (PIER 28 IMPORTS, PIER AND PORT RESTAURANT). The letters *st*, *nd*, and *th* following an Arabic number are ignored (1st is indexed as 1, 2nd as 2, 5th as 5 and so on).

Inclusive or hyphenated numbers (7-11 Grocery Store) are indexed according to the number before the hyphen and the number after the hyphen is ignored (7 GROCERY STORE). Hyphenated numbers that are spelled out (Thirty-one Flavors) are considered one unit and the hyphen is ignored (THIRTYONE FLAVORS). An Arabic number followed by a hyphen and a word (7-Gables) is considered one unit (7GABLES) and the hyphen is ignored.

NAME	UNIT 1	UNIT 2	UNIT 3	UNIT 4
1 Start Up Now	1	START	UP	NOW
3-4-5 Estimated Steps	3	ESTIMATED	STEPS	
34th Street Palisades	34	STREET	MARKET	
2-Weeks Now Motel	2WEEKS	NOW	MOTEL	
XXI Theme Park	XXI	THEME	PARK	
Gregory's 3-Lane Repair Co.	GREGORYS	3LANE	REPAIR	CO

Gregory's Window Installment	GREGORYS	WINDOW	INSTALLMEN T	
Thirty Minute Crab House	THIRTY	MINUTE	CRAB	HOUSE
Thirty-First Avenue Imaging	THIRTYFIRS T	AVENUE	IMAGING	
Two Scoop's Eatery	TWO	SCOOPS	EATERY	

Practice Rule 9:

Name	Index Practice	Alphabetize with 1 starting at the beginning and 6 at the end
The Makco Five, Inc.		
6th Avenue Apts.		
Makco 5 Gas Station		
Sixth Dimension Insurance Co.		
62nd Street Deli		
Makco 5-2		

Rule 10: Symbols in Business and Organization Names

If a symbol is part of a name, the symbol is indexed as if spelled out. When a symbol is used with a number without spacing between ($5, #1), it is considered one unit and the symbol is spelled out (5DOLLAR, NUMBER1). See table with symbol and spelling below.

SYMBOL	INDEXED AS

&	AND
¢	CENT
$	DOLLAR OR DOLLARS
#	NUMBER, POUND, or POUNDS
%	PERCENT

NAME	UNIT 1	UNIT 2	UNIT 3	UNIT 4
100% Tutoring	100PERCENT	TUTORING		
20¢ Apple House	20CENT	APPLE	HOUSE	
The Dollar Dart Den	DOLLAR	DART	DEN	THE
$ Weight Training	DOLLAR	WEIGHT	TRAINING	
#1 Budgets	NUMBER1	BUDGETS		
Zillion Great ¢ Company	ZILLION	GREAT	CENTS	COMPANY

Practice Rule 10:

Name	Index Practice	Alphabetize with 1 starting at the beginning and 6 at the end
#1 Auto Repair Shop		

$ Saved Used Furniture		
The 99¢ Bargain Basement		
#One Appliances		
Dollar Drug Store		
9th Street $ and ¢ Store		

Rule 11: United States Government Names

Government names are indexed first by the location name of the government unit—country, state, county, or city. Next, index the distinctive name of the department, bureau, office, or board. The words "Office of," "Department of," "Bureau of," etc. are separate indexing units when they are part of the official name.

Rule 11A: State and Local Government

State and local government names are indexed first by the name of the state, province, county, city, or town that has jurisdiction over that government agency. The distinctive name of the agency is considered next. For example, a city will have jurisdiction over a board of education, so the city would be indexed first, then the board of education. The words *State of*, *County of*, *City of*, Department of, etc. are added only if needed for clarity and if it is in the official name.

NAME	UNIT 1	UNIT 2	UNIT 3	UNIT 4	UNIT 5	UNIT 6	UNIT 7
Burl County Courthouse, Columbus, Ohio	BURL	COUNTY	COURTHOUSE	COLUMBUS	OHIO		

Board of Education, Houston, Texas	HOUSTON	EDUCATION	BOARD	OF	HOUSTON	TEXAS	
Banking Office, Dept. of Commerce, Georgia	GEORGIA	COMMERCE	DEPT	OF	BANKING	OFFICE	GEORGIA

Practice Rule 11A:

Name	Index Practice	Alphabetize with 1 starting at the beginning and 5 at the end
Seattle Police Dept, Seattle, Washington		
Travis County Medical Examiner, Travis, Missouri		
Department of Health, Ferris County, Vermont		
Department of Tourism, State of Maine		
Department of Education, New York State		

Rule 11B: United States Government Names

United States government names are indexed first under United States Government, then by the distinctive name of the department, bureau, or service. The words *Department of*, *Bureau of*, and so on follow if it is part of the official name. In each of the following examples, Unit 1 is *United*, Unit 2 is *States*, and Unit 3 is *Government*.

NOTE: Because space is limited in the example below, Unit 1, Unit 2 and Unit 3 are displayed above and indexing begins with Unit 4.

	UNIT 1	UNITED			
	UNIT 2	STATE			
	UNIT 3	GOVERNMEN T			
NAME	UNIT 4	UNIT 5	UNIT 6	UNIT 7	UNIT 8
U.S Department of Transportatio n	TRANSPORTATIO N	DEPARTMENT	OF		
U.S Department of Labor Employment Standards	LABOR	DEPARTMENT	OF	EMPLOYMEN T	STANDARD S
Bureau of Prisons Justice Department	JUSTICE	DEPARTMENT	PRISONS	BUREAU	OF
U.S. Treasury Department	TREASURY	DEPARTMENT	CUSTOM S	SERVICE	

Customs Service					

Practice Rule 11B:

Name	Index Practice	Alphabetize with 1 starting at the beginning and 5 at the end
U.S. Department of Interior, National Park Service		
Bureau of Engraving and Printing, U.S. Department of Commerce		
Internal Revenue Service, U.S. Department of the Treasury		
U.S. Department of Education		
Federal Aviation Administration, U.S. Department of Transportation		

Rule 11C: Foreign Government Names

Foreign government names are indexed first by the name of the country, then by the name of the distinctive department, bureau, or board. The words *Department of*, *Bureau of*, *Ministry of*, etc. follow if it is part of the official name.

NAME	UNIT 1	UNIT 2	UNIT 3	UNIT 4	UNIT 5

Republic of China	CHINA	REPUBLIC	OF		
Federal Republic of Nigeria	NIGERIA	FEDERAL	REPUBLIC	OF	
Consulate General Sweden	SWEDEN	CONSULATE	GENERAL		
Department of Human Resources Uganda	UGANDA	HUMAN	RESOURCES	DEPARTMENT	OF

Practice Rule 11C:

Name	Index Practice	Alphabetize with 1 starting at the beginning and 5 at the end
Ministry of Agriculture, Venezuela		
Industrial Development Authority, Portugal		
Department of State, Australia		
Bureau of Mining, Republic of Zaire		
Ministry of Education, Republic of China		

Rule 12: Addresses

When personal names and names of businesses and organizations are otherwise identical, the filing order is determined by the address. The elements of the address are considered in the following order: City, State (spelled out in full), Street Name, Quadrant (NE, NW, SE, SW), House or Building Number.

NOTE: Because space is limited in example below, Unit 1 is displayed above and indexing begins with Unit 2.

	UNIT 1	OFFICE WORLD			
NAME	UNIT 2	UNIT 3	UNIT 4	UNIT 5	UNIT 6
Office World 12th Avenue NE Akron, Ohio	AKRON	OHIO	AVENUE	NE	12
Office World 86 Elm Street Akron, Ohio	AKRON	OHIO	ELM	STREET	86
Office World 600 Warner Ave Columbus, Ohio	COLUMBU S	OHIO	WARNER	AVE	600
Office World 7^{th} Avenue SW Portland, Oregon	PORTLAND	OREGON	AVENUE	SW	7

Practice Rule 12:

Name	Index Practice	Alphabetize with 1 starting

		at the beginning and 4 at the end
Mountain Bank 450 Cedar Drive Pittsburgh, PA		
Mountain Bank 115 Concord Road Pittsburgh, PA		
Mountain Bank 4500 Cedar Ave Houston, TX		
Mountain Bank 75 Concord Road Houston, TX		

Cross-Referencing

A cross-reference is a notation that a name is also filed elsewhere. Some records of people and businesses may be requested by names that are different from those by which they are stored. This is particularly true if the key unit is difficult to determine. When a record is likely to be requested by any of several names, a cross-reference is prepared.

If a permanent cross-reference is needed in a paper filing system, use a new file folder with the cross-referenced information. The cross-reference guide should show the necessary retrieval information on the tab. Here is an example:

old name

new name

In a digital filing system, you can use software tools like word processors, spreadsheets, or databases to create digital cross-references that can be hyperlinked, embedded, or referenced.

A cross-reference would be prepared in the following situations.

Personal Names

1. Changed Names. When a person has changed their name due to marriage, divorce, etc. You would file records under the new name. However, for a period of time, you would make a notation of the name change in the new file cross-referencing it to the file listed under the former name.

2. Unusual Name. When it is difficult to determine which of a person's name is the surname. For example, a foreign name, such as Taipei Chou, would be filed under Chou and cross-referenced under Taipei. Another example would be where both names appear to resemble the first name, such as Gary David. The original file would be indexed under David and cross-referenced under Gary so if a request came in for David Gary, one could find the reference to the original file.

3. Hyphenated Name. When the surname is hyphenated. Some women, and sometimes men, use hyphenated surnames when they get married. For example, Sue Bennett-Anderson, would be filed under Bennett and cross referenced under Anderson. Some men use hyphenated surnames that are their family names. If this is the case, they are already known by that name and do not need to be cross-referenced under both surnames.

4. Alternate Name. When a person is known by more than one name, such as a business name, you need to make cross-references. Some examples are Mary Hasfurther-Smith doing business as Mary Hasfurther; Jenny Starwing doing business as Jenny Star; John Chandler, DDS, also known as John Chandler, III.

5. Similar Names. There may be a variety of ways to spell a name, such as Allen, Terry, Vicki, Kathy, etc. A "SEE ALSO" cross-reference is prepared for all possible spellings.

Business Names

The original name filed is the name appearing on the letterhead.

1. Compound Names. When a business name includes two or more surnames, a cross-reference is prepared for each surname other than the first. For example: Anderson, Johnson, and Williams

Attorneys would be listed under Anderson and cross-referenced under both Johnson and Williams.

2. Abbreviations and Acronyms. When a business is commonly known by an abbreviation or an acronym, a cross-reference is prepared for the full name. Some examples are ARMA (Association of Records Managers and Administrators, Inc), MADD (Mothers Against Drunk Drivers), and IBM (International Business Machines Corporation).

3. Popular and Coined Names. A business may be known by a popular or coined name. A cross-reference will help in locating the file. Some examples are: Penny's (J.C. Penny's), Betty's (Betty's Café), and Smitty's (Smith's Hardware Store).

4. Hyphenated Names. Just like personal names, business surnames that are hyphenated need to be cross-referenced for each surname combination.

W01 Quiz: Rules of Filing

Instructions

I. Study the 12 Rules of Filing (pages 15-35 yellow tables above)
II. Practice indexing and alphabetizing after each of the 12 Rules (pages 15-35 blue tables above)

Quiz: Return to Canvas and take the quiz W01 Quiz: Rules for filing.

W01 Activity: Create a Filing System

Instructions

III. Create a filing system to keep your office or personal materials together in a logical order.
    I. Determine an area where materials need to be organized into a filing system. For example, your personal files (church documents, education, income taxes, insurance, mortgage, and other categories). Your files may be in paper format or in electronic format.
    II. Evaluate which filing system is best for your situation: alphabetic,

numeric, or subject. For example, in the image below the files are alphabetical by subject (church, education, taxes) and then alphabetical for church and education, and numerical for taxes using years.

IV. Using the computer or plain paper, plan your system.
    I. Determine how color coding will help you distinguish the files. (For example, colors (yellow for church, blue for education, and green for taxes) were used to represent different categories as seen in the image above.
    II. Make professional-looking labels.

V. In an MS Word document, in memo (short for memorandum) format answer the following questions:
    I. Include a picture of your system.
    II. Explain your system.
    III. Explain the benefits you anticipate from using your filing system.
    IV. Describe any issues or problems you experienced in putting your system together.
    V. Explain how your learning can be applied to your current or future workplace.
    VI. Memo format is not discussed until Chapter 3. Therefore, you may refer to the example Interoffice Memorandum in Appendix D.

VI. Save your work.

Submit: Return to Canvas and submit your MS Word Memo in the W01 Activity: Create a Filing System.

Chapter/Week 2 Relationship Management and Interpersonal Skills

This week, you will read about the day-to-day interactions that take place in the office. You will read about workplace behaviors and take a survey evaluating your hard and soft skills. You will learn about workplace relationships. You will discuss with your peer's employee relationships and Christlike communication.

Case Study
Imani was interviewing for a new position at a local government agency. They asked her to do a video introduction as part of her application. Here is her story:
I worked at a school for the last ten years helping children. The position's funding was being cut and I was looking for a new position. I applied for a job helping older retired adults. It was a big change and I was not super prepared. A week after submitting my application I was emailed a link to submit a video introduction. Wow, not only did I have to interview, but I had to do it on camera without eye contact or smiling people on the other side. I needed this job, so felt a lot of pressure to do well. I asked a friend to help me practice. She said the most important thing to show during an interview introduction is your personality. So I worked on my word choices and made sure I covered the important things. But then made sure that I had a bright smile and tried to show my caring personality. I recorded my interview introduction and nervously sent it off. The next day I got a call to come and meet the team in person. I got there they took me on a tour and asked me some questions about my work style and communication methods. Then they said they would let me know. I GOT THE JOB!

Interpersonal Communication

"Therefore all things whatsoever ye would that men should do to you, do ye even so to them" (Matthew 7:12)

Optional Videos:

- How to Deal With Difficult Coworkers + Office Politics (How to Deal with Difficult People at Work)

What business are you in? You may think you're in finances, health care, or retail; but the truth is, you're in the people business because no matter what your job is, you work with people every day. Whether you deal primarily with external or internal customers, you interact with people on a constant basis, and the way you communicate with them determines how successful you are in your job.

In his book, 7 *Habits of Highly Effective People*, Stephen R. Covey said, "**Seek first to understand**, **then to be understood**. In order to really seek to understand, you cannot have already judged a person or situation. You need to develop a desire to understand — meaning a desire to see things from others' point of view, to see their reasons, and feel what they feel."

Professional Maturity

Professional Maturity has nothing to do with your age or time in position. It is based on five concepts.

1. **Be Honest** - If you don't have the answer to someone's question, it is better to say "I don't know, let me find out what I can and get back to you." **Do not be afraid to ask for help**
2. **Remember the Golden Rule** - treat others the way you want to be treated.
3. **Remove emotions**–Accept that business decisions are business decisions. Comments about the outcome of a project are not comments of your efforts, but a reflection of the organization's interest at the time.
4. **Be aware of workplace culture**–Learn the workplace culture or values. What actions are encouraged and what actions are discouraged.
5. **Enjoy the silence**–Quiet your mind and make time to develop your thoughts before expressing them or on them.

W02 Survey: Hard Skills
1. Complete Column W02 in the Hard Skills Survey in Appendix D 2. Return to Canvas and take the W02 Survey: Hard Skills
W02 Survey: Soft Skills
3. Complete Column W02 in the Soft Skills Survey in Appendix D. 4. Return to Canvas and take the W02 Survey: Soft Skills

Now that you have self-evaluated what skills you currently possess, now you can add these skills to your resume and discuss them in a future job interview.

W02 Activity: Present Your Best Self

Background
Have you heard the saying "You only have one chance to make a first impression."? This is especially true when trying to get a job, a promotion, or secure an important account. "The Present Your Best Self" assignment is a great practice to perfect your first impression speech.

Instructions

VII. **Write** a brief introduction.
   I. Consider what you would say to an employer during a job interview when asked "Tell us a little about yourself."
   II. Read **Me in 30-seconds**

VIII. **Create** a **one-minute video** recording of your personal introduction.

IX. **Record** yourself (speaking in front of the camera).
   I. How to record and post a video using the following:
      i. How do I record media using the Rich Content Editor as a student?Links to an external site.
      ii. How do I add an attachment to a discussion in the Student app on my iOS device?Links to an external site.
      iii. How do I reply to a discussion in the Student app on my Android device?Links to an external site.
   II. How to Record a Great Video of Yourself (01:32 mins, "How to Create a Great Video of Yourself" Transcript.)
   III. Critically review your presentation **before** submitting the video:
      i. What are you wearing? (Dress professionally.)
      ii. What about your language? (Do not use slang or overuse phrases.)
      iii. Where are you looking? (Talk directly to the audience.)
      iv. Do you give an impression of confidence? (Lift your head and lower your shoulders.)
      v. What about facial expressions? (Smile and use pleasant facial expressions.)

X. **Save** your video.

Submit: Return to Canvas and submit your video in the W02 Activity: Present Your Best Self

Me in 30 Seconds

The Me in 30 Seconds or Elevator Pitch* is a short statement about you and your passions. This statement can be used when introducing yourself to an employer at a career fair or when an interviewer asks you to "Tell me about yourself."

Below is a sample elevator pitch. (Please do not copy this sample, make it your own).

1. Full Name (First or Preferred First and Last Name):
    - Hi! My name is _________ and I am proud to be from _________.
2. Where you're from:
    - If you're an international student, also say how long you have been in the US for.
3. Deliver your passion in this format:
    - "I am currently a _________ major at BYU-Idaho focusing on _________."
    - "I chose this degree because _________."
    - "I love this degree because _________."
4. Express your interest:
    - I am very interested in learning more about the complex problem _________.
    - I plan to graduate from _________ with a degree in _________.
    - After graduation, I plan to _________.
    - Ultimately, I would like to _________.
    - I believe my degree will prepare me well to _________ because _________.
5. Normally, an elevator pitch ends with you asking this question:
    - "Who do you think I should talk to?"

*The term Elevator Pitch comes from the scenario of meeting someone in the elevator (perhaps the CEO of the company!) and he or she asks you, "What do you do?" You have a short amount of time to make an impression (the amount of time it takes to ride the elevator from the floor you're on to the floor where you or the CEO is getting off!), and to tell the CEO enough about you that he or she remembers you the next time you meet. Make yourself memorable in the best way!

Emotional Intelligence

Daniel Goleman, author of the book *Emotional Intelligence*, identifies four components contributing to emotional intelligence. The first two components, self-awareness and self-management are individual and relate to effectively managing your own emotions. The second two, social awareness and relationship management, are social and relate to effectively recognizing (and managing) the emotions of others.

Emotional Intelligence is not only critical in life in general, but an expectation of the workplace. People are messy, everyone has different personalities, different issues, and different expectations. We are not just judged by how smart we are, but by how we handle ourselves and each other.

1. Emotional Self-Awareness: knowing your feelings in the moment.
2. Emotional Self-Management: managing strong feelings
3. Social Awareness: Empathizing accurately with other people's emotions.
4. Relationship Management: Handling emotions in relationships with skill and consonance.

Relationship Management

Relationship management is more than simply having relationships—it requires taking intentional steps to ensure they're healthy and beneficial to both parties. Dysfunction in the workplace can run rampant among colleagues and teams. This creates a mindset of something you have to deal with rather than interact with or even enjoy! Rather than letting poor relationship habits rule the workplace, you should create a secure, supportive, and compassionate work environment.

Case Study
Miriam worked at a medical billing company. Here is her story about her coworker David:
I worked with a guy whose only intent in life seemed to be to annoy people. He rarely did any work, usually claiming that he was "new to the company" and someone with a better notion of the background should do it instead, even after six months of working with the company. Any work he did had to be redone, or was only done halfway and needed to be completed. He would leave important documents laying about, even though we have a clean desk policy. He wouldn't lock his computer when he took breaks, leaving personal billing information visible to all. He would leave a desk heater unattended, which is a fire risk. He would spend the whole day singing, whistling, and/or tapping his foot. On the many occasions that I asked him to please stop, he'd intentionally do it louder, like a little kid. One day I entered the office and noticed files lying around everywhere. I began cleaning up and was feeling pretty grumpy about it. My manager came in, and I put a smile on my face and said, "Good morning." My manager said, "Let me ask: was David the last to leave yesterday?" I replied, "How did you know?" My manager answered, "Well, I see that the heater was left on and these documents were lying about." My manager then said, "I am glad that you take better care of our work environment." It certainly didn't make working with

David easier, but it did make work better knowing that I was appreciated by my manager. David only lasted a few more months before deciding that he had "outgrown" his position with our company and applied for a new job with a different company.

Working with people is an art, one that many people never fully learn. It requires the following:

- Patience
- Kindness
- Diplomacy
- Good communication skills

You may have a lot of technical knowledge and skill, but there's another kind of knowledge that's just as important: people-knowledge. It's the ability to read and adapt to each individual you come in contact with. You'll find that most people respond to kindness, consideration, and a polite manner. Beyond this, understanding people—their interests, motivations, and emotions—will help you to be more effective in working with them.

Therea are 10 personal qualities to help you improve relationships and teamwork skills in your personal and professional life. These include:

- Project a Professional Image–How you dress and how you act
- Show your Human Side–Your compassion and ability to empathize
- Project a Pleasant Personality–How you speak to others and if you are helpful
- Display Honesty & Integrity–Always tell the truth and be Christlike
- Exhibit Self-Management–Do your work, be honest about your work hours
- Be Sociable–Be pleasant and inclusive
- Develop Positive Self-Esteem–You add value to your company by your work and actions
- Be a Self-Starter–If you see something that needs to be done, do it
- Be Dependable–Be where you are supposed to be, do what you are supposed to do
- Be Responsible–Do your work to the best of your ability, take care of your assigned items

W02 Activity: Relationship Management
Instructions

1. **Create** a memo listing the 10 personal qualities from the infographic above.
    1. Memo format is not discussed until Chapter 3. Therefore, you may refer to the example Interoffice Memorandum in Appendix D
    2. List an example of a time you successfully demonstrated each of the 10 qualities (one example per quality for a total of 10 examples).
    3. List an example of a time you did not successfully demonstrate each of the 10 qualities (one example per quality for a total of 10 examples).
    4. For each time you were unsuccessful, list what you could have done differently.
2. **Save** your work.
3. **Review** the rubric to ensure you have met the grading criteria.

Submit: Return to Canvas and submit your MS Word Memo in the W02 Activity: Relationship Management

To learn more about people skills, check out the following books:

- *The 7 Habits of Highly Effective People* (by Stephen Covey)
- *How to Win Friends and Influence People* (by Dale Carnegie)
- *The Fine Art of Small Talk* (by Debra Fine)
- *The Power of Positive Confrontation* (by Barbara Pachter)
- *PeopleSmart* (by Mel Silberman)

(Reference: Parlay International, *You're in the People Business*, Copyright 2000 by Parlay International, Published by Parlay International, Emeryville, CA. Distributed under licensing agreement to BYU-Idaho employees.)

Barriers to communication

Anything that prevents understanding of a message is a barrier to communication. Some common barriers are missing the meaning, differing interpretations, using unfamiliar words or technical jargon, not actively listening, and emotional or physical distractions. Reasons for breakdown in communication are many. The important thing is to look for breakdowns and attempt to remove the barriers.

Nonverbal Communication

Interpersonal communication not only involves the information or message conveyed, but also refers to messages which are expressed through non-verbal behaviors, even if unintentional.

Non-verbal communications include facial expressions, the tone and pitch of the voice, gestures displayed through body language and the physical distance between the communicators. These non-verbal signals can give clues and additional information and meaning in addition to the verbal communication.

Non-verbal Messages Allow People To:

- Reinforce or modify what is said in words. For example, people may nod their heads vigorously when saying "Yes" to emphasize that they agree with the other person.
- Convey information about their emotional state. A shrug of the shoulders and a sad expression when saying "I'm fine thanks," may imply that things are not really fine at all!
- Define or reinforce the relationship between people.
- Provide feedback to the other person.
- Regulate the flow of communication, for example by signaling to others that they have finished speaking or wish to say something.

Smile: Whether you are face-to-face or over the phone or typing a message, smile. Even if the person is yelling at you, smile. A smile displays warmth and makes you approachable. Smile if you are face-to-face, over the phone, or using electronic communication.

Gestures (you): Believe it or not, it is better to talk with your hands. If you don't use your hands and make gestures you come across boring or stiff (remember this when making presentations). You can nod your head to indicate you are paying attention. Saying *uh-huh* on the phone is the same as maintaining eye contact when face-to-face.

Gestures (them): Body language signs will signal annoyance (finger tapping), boredom (yawning or eye rolling), rocking or leg swinging (you are too close), or averting eyes (you are making them uncomfortable). Pay attention to the body language of those you are speaking to and make adjustments when necessary.

Distance: Different cultural norms indicate the distance to maintain when talking face-to-face with someone. In the United States, the distance is generally three feet, however those from California will stand closer together than those from New York. In some countries, you bow when meeting each other and in other countries you shake hands. When someone violates an 'appropriate' distance, people may feel uncomfortable or defensive. Their actions may well be open to misinterpretation.

In Western society, four distances have been defined according to the relationship between the people involved

- Intimate Distance (touching to 45 cm)
- Personal Distance (45 cm to 1.2 m)
- Social Distance (1.2 m to 3.6 m)
- Public Distance (3.7 m to 4.5 m)

Understanding these distances allows us to approach others in non-threatening and appropriate ways. People can begin to understand how others feel about them, how they view the relationship and, if appropriate, adjust their behavior accordingly.

Posture: Posture can reflect people's emotions, attitudes and intentions. Two forms of posture have been identified, ‘open’ and ‘closed’, which may reflect an individual's degree of confidence, status or receptivity to another person. Someone seated in a closed position might have his/her arms folded, legs crossed or be positioned at a slight angle from the person with whom they are interacting. In an open posture you might expect to see someone directly facing you with hands part on the arms of the chair. An open posture can be used to communicate openness or interest in someone and a readiness to listen, whereas the closed posture might imply discomfort or disinterest.

Eye Contact: Eye Contact is an important aspect of non-verbal behavior. In interpersonal interaction, it serves three main purposes:

- Looking at someone lets them know that the receiver is concentrating on the content of their speech. Not maintaining eye contact can indicate disinterest.
- To let a partner know when it is their 'turn' to speak. When a person has finished what they have to say, they will look directly at the other person and this gives a signal that it is now the other person’s turn to talk.
- To communicate something about a relationship between people. The maintenance of positive eye contact signals interest or attraction.

Voice: Paralanguage relates to all aspects of the voice which are not strictly part of the verbal message, including the tone and pitch of the voice, the speed and volume, at which a message is delivered, and pauses and hesitations between words. These signals can serve to indicate feelings about what is being said. Emphasizing particular words can imply whether or not feedback is required.

Appearance: Personal appearance is an often disregarded part of communication and presentation skills. It is your appearance that the other person, group or audience sees and before you have time to open your mouth and give an account of yourself, certain assumptions, both consciously and subconsciously, have been made.

What sort of external image is appropriate to the organization you represent? Only you can answer this question. Due to the nature of the work, some organizations are happy for people to be casually dressed, whilst others may expect smarter attire. It is important to be suitably dressed within expected limits.

Verbal Communication

"Let no corrupt communication proceed out of your mouth, but that which is good to the use of edifying, that it may minister grace unto the hearers" (Ephesians 4:29).

Communication starts when two or more people need to exchange information whether verbally or in writing. Communication is more complicated as it involves listening and understanding. Forbes provides 10 steps for effective listening as shown below:

- Step 1: Face the speaker and maintain eye contact. Don't cross your arms, this gives the appearance of disbelief or anger.
- Step 2: Be attentive, but relaxed.
- Step 3: Keep an open mind.
- Step 4: Listen to the words and try to picture what the speaker is saying. Don't focus on the speaker's poor communication habits. Skip over delivery errors and focus on the message.
- Step 5: Don't interrupt and don't impose your solutions. Don't interrupt to tell your own story or version of events.
- Step 6: Wait for the speaker to pause to ask clarifying questions. It is okay to take notes while the speaker is speaking if there is a lot being said and you don't want to miss details.
- Step 7: Ask questions only to ensure understanding.
- Step 8: Try to feel what the speaker is feeling. Do not say *I understand* if you don't. For example, if the speaker just told you their mother died and your mother never died, then you don't know how they feel. You may empathize if you have experienced the death of a loved one.
- Step 9: Give the speaker regular feedback. For example, "I see that event made you happy" or "I see why that would make you frustrated."
- Step 10: Pay attention to what isn't said—to nonverbal cues.

Communicating with others will take approximately 80% of each work day, so being an effective communicator is a critical skill to develop. The results from one study of Fortune 1000 companies indicated that employees send and receive over 1,500 messages each day. Messages may be delivered or sent via cell phone, fax, email, in the mail, and face-to-face. Messages are verbal and nonverbal, intentional and unintentional. Be aware of the messages you are delivering.

> "Effective communication strengthens the connections between a company and all of its stakeholders and benefits businesses in numerous ways: Stronger decision making and faster problem solving; earlier warning of potential problems; increased productivity and steadier workflow; stronger business relationships; clearer and more persuasive marketing messages; enhanced professional images for both employers and companies; lower employee turnover and higher employee satisfaction; and better financial results and higher return for investors" (entrepreneur.com).

Ten Hints to Boost Your Face-to-Face Communication Skills

1. Avoid repetitive phrases such as uh, like, and okay. Habitual phrases or nervous pause fillers are distracting.
2. Slow down. Nervousness or insecurity can cause you to talk fast.
3. Let your voice help. Monotone voice tones are hard to listen to. Allow your voice to help you emphasize your point or convey your feelings.
4. Watch your volume. Don't speak so loudly that it impacts others around you; don't speak so softly that you have to repeat yourself.
5. Speak clearly. If you are asked to repeat yourself, you may be mumbling.
6. Use correct words. Some words sound similar but really mean different things. If unsure, look up the word or choose a different word.
7. Make eye contact. Looking someone in the eye shows you are focused on your interaction.
8. Be aware of body language. A little animation shows you are engaged. Watch for negative body language.
9. Smile. A smile shows you are friendly and enjoying your interaction. A smile can be heard even over the phone.
10. Think. Don't just say the first thing that pops into your head. Think, breathe, speak. Think about what to say, take a breath, and then speak. (More details may be found at: Customer Service Training)

Customer Service

Mahatma Gandhi said, “a customer is the most important visitor on our premises, he is not dependent on us. We are dependent on him. He is not an interruption in our work. He is the purpose of it.”

Customer service is more than just providing good service to those purchasing a good or service. You may work in a mailroom and never see a paying customer and yet still offer great customer service. Customer service at all levels of the company adds to the customer’s experience, from speaking to an administrative assistant over the phone, to receiving their order correctly and on time. However, the term customer can also refer to your co-workers, often called internal customers. It is your responsibility to treat everyone with good customer service to build a thriving business culture of camaraderie. Think about a time you had great customer service. It probably wasn’t about the product or service you bought but rather how you were treated as a person. Working well with people is more than just important; it’s critical.

Five Hints to deal with difficult customers
“Wherefore, my beloved brethren, let every man be swift to hear, slow to speak, slow to wrath” (James 1:19).

1. Keep your cool and stay calm.
    - First priority is controlling you. Expect good behavior from yourself. If you are at risk of losing control, take a break or count to ten.
2. Listen to them.
    - Show them you care about their opinion. Confirm that you understand. That doesn’t mean you have to agree. Sometimes people just need to vent.
3. Be proactive, not reactive—pick your battles.
    - No matter what a person does, you choose your reaction. You can control the conversation and engage it how you want. Make your own decisions, don’t let your emotions decide.
    - Think positively and in terms of solutions.
    - Decide if engaging with that person is worth it. Sometimes it’s easier to not engage and just let it pass (an angry caller or customer).
4. Separate the people from the problem.
    - Don’t attack the person, deal with the problem directly. Don’t think, *you’re stupid*, but rather, *that was stupid*.
    - Smart people can do dumb things. Separate the person from the action.
5. Communicate accurately and appropriately.
    - *I* or *you* language cautions
    - Don’t exaggerate or embellish
    - Use irony and humor appropriately

- Be firm when you need to be

Customer Service Tips
The key to complete customer care is immediate action. Real caring comes through understanding that Customers Are Really Everything (CARE). Here are some tips on how to make your customers your immediate concern:

1. **Answer phone calls within two to three rings.** This helps customers know that they are important.
2. **Same-day returns for voicemail or email messages.** Customers don't want to feel like you forgot about them. Return voicemail or email messages the same business day, even if you don't have all the answers 100% completed.
3. **Acknowledge all customers.** Whenever a customer comes face to face with you, let them know somehow that you know that they are there.
4. **Thank the customer.** Your job exists because of the customer. So thank them not just once, but sincerely and honestly as many times as you can.
5. **Knowledge is power.** Share your knowledge with the customer. You know all the answers, so share them. An informed customer is a happy customer.
6. **Save your customer's time.** Our most precious commodity is time; so whenever you can, save a customer even five minutes. Take the opportunity.
7. **Listen to complaints about poor customer service.** Feedback allows the company the opportunity to see the interaction through the customer's eyes. Complaints are always a good thing and should be encouraged. Consequently, so should praise!
8. **The customer is always right.** Whoever coined this phrase is 100% correct, because even if the customer is wrong, they are **always** the customer. Treat customers with respect and how **they** want to be treated (not how you want to be treated) and they will return again and again.

Telephone
"Let us oft speak kind words to each other, At home or where'er we may be" (Hymn 232).

When talking on the phone, you are not seen by the person on the other end of the line, hence your telephone manners must be courteous.

Phone Etiquette: Etiquette is another word for manners. When the phone rings, you should answer as quickly as possible, the person on the other end of the line cannot see you have a dozen clients in front of you waiting, they only know how long it took you to answer their call. State the name of your company and your name, for example "Thank you for calling BYU-Idaho, this is Juanita, how may I help you today?"

Have pen and paper near the phone in case you need to take notes or a message from the caller. Always speak loudly, but don't yell. Also enunciate your words, don't mumble. Listen carefully to the caller, whether they are asking questions or giving you information. Repeat what was said so the caller knows you listened. If they provided you with any information, thank them immediately. If you can answer the question immediately, do so. If you can't answer immediately, let the caller know you need some time, estimate how much time you need to get the information the caller needs and then ask them how they would like to be treated. For example, "Mr. Mandela, thank you for asking about Financial Aid options. I will need about three minutes to track down the information for you. Would you like to hold or would you like me to call you back?" If you put someone on hold, you should check in every two minutes. Two minutes seems a lot longer when you are on hold. If they would like you to call them back, call them back in the stated time even if you don't have their answer yet. This lets them know you are still trying to help them.

Multiple phone lines: If a second call comes in while you are on the first call, ask the first caller to hold, answer the second call and ask the caller to hold as you are on another line, then return to the first caller. Never keep either line holding for more than two minutes. When you place the second call on hold, listen for just a moment in case they are ok just leaving a message or calling back. **Never** answer a call and immediately put them on hold without a greeting. For example, "Thank you for calling BYU-Idaho, could you hold a moment please?" **Wait** for an answer. If the caller says yes, put them on hold. If the caller says no, ask them to state the matter of their emergency. If the caller just rambles, tell them you need to put them on hold to return to the first caller.

If you answer a colleague's phone, indicate such to the caller, for example, "Jennifer's office, this is Melissa speaking." You might be able to answer the caller's question, take down the information, or take a message.

Transfer: If you must transfer a call to someone else, explain to the caller to whom and why you are transferring them. For example, "Mrs. Smith is in charge of Financial Aid and I am sure she will advise you correctly, let me transfer you." If transferring to a public number, offer the caller the number prior to transferring in the event they need to call again. For example, "The recorder's office will be able to help you with this, their direct number is 123-456-7890, let me transfer you." If you don't know who the person needs to be transferred to, let them know you don't know (honesty is appreciated), how long you anticipate finding the correct person, and how long before the caller will have an answer. For example, "Mr. Eriksson, I am not sure which department covers accidents. I will need about 10 minutes to track down this information for you. Would you like me to call you back in 10 minutes?"

Messages: When taking messages, write down the message verbatim, that is, word for word. A single word omitted could change the entire meaning of the message. Ask for the spelling of any names. Ask for spelling of any unclear terms such as hyp**er**glycemia which is not the same as hyp**o**glycemia. Make sure to get full contact information for any follow-up.

Screening: Your employer may ask you to screen his calls, which means only let certain calls through to him. Screening needs to be handled tactfully so no one is offended. Teamwork with your employer will allow you to more quickly learn what types of calls need to be screened. There is no need to lie. You can simply state "Mr. Brassanini is not available right now to take your call, may I take a message for you?"

Another reason for screening is to actually route the calls to the right person. Perhaps when the company first started there was only one vice-president and now there are three. By asking the caller the nature of their call, even when they asked for a specific person, you may be able to let them know how to get quicker help. For example, "The sales and marketing departments have been split. Mr. Rodriguez is over sales and Mr. Zhang is over marketing. I can transfer you to the marketing department."

Voice Mail: Voice mail is the message callers get when no one answers the phone. It is important for the message to be concise and informative so as to not upset the caller. Here are some tips for a concise, informative message:

1. Name of the company
2. Phone number of the company
3. Hours of operation
4. Indication of when calls will be returned—for example,"Messages will be returned within 24 hours."
5. Request for callers to leave a detailed message

Most phone systems will allow you to set up a secondary greeting for when you will be out of the office for an extended period of time such as for a family vacation. This lets the caller know not to expect an immediate response from you. You may include who the caller may contact in your absence. A sample alternate greeting could be: "I am out of the office, returning October 5th. If you need immediate assistance please call our Helpline at 123-456-7890 and the operator will assist you." If your phone system does not have the option for a secondary greeting, you may need to record over your main greeting. If your system does not have a way to set up an end date for your alternate greeting, leave yourself a note to turn off your secondary greeting when you return.

Answering Service: If you use an answering service to answer your phones, be sure they know the office hours and how many rings to wait before they should answer the phone. For example, if you work 8:00 a.m.–5:00 p.m., let the answer service know you will answer calls between 8:00

a.m. and 5:00 p.m. Also, let them know how many rings to wait before answering between 8:00 a.m. and 5:00 p.m., for example, wait five rings. Generally, an answering service is contracted to answer phones after hours, so clients still receive 24 hour personal service.

Frequent calls: Your employer may make frequent calls to the same number, such as a supplier or vendor. It will be useful to keep an inventory of frequently called numbers. Many phones will allow you to save various phone numbers for quick dialing. It will be good to recognize phone numbers your employer uses frequently. This aids the efficiency connection between you and your employer.

Telephone Courtesies

1. Identify yourself by announcing your name or the name of your department, instead of just hello.
2. Speak directly into the mouthpiece—one inch from your mouth—so that your voice will be clear and you can be understood. Speak clearly and enunciate your words.
3. Use your hold button. Unless you cover both ends of the handset, your voice is still transmitted and you will be heard.
4. Before you put a caller on hold, ask for permission to do so. Do not leave the phone for more than one minute.
5. Speak with enthusiasm—smile into the receiver, because your voice will reflect your attitude.
6. 55% of communication is non-verbal. For this reason, it is important to develop good listening and verbal skills to compensate for the lack of eye contact, facial expressions, and gestures.
7. Use the other person's name often. People like to hear their name.
8. Use good grammar and diction; avoid slang. Gum chewing destroys good diction.
9. Speak slowly enough to be easily understood.
10. Be informed about your business, its services and personnel, and have basic materials and information readily available for reference. Make referrals to other people properly.
11. End the conversation with a definite goodbye or any other expression which leaves no doubt that the conversation is ended.
12. Who should hang up first? Let the person calling hang up first.
13. Hang up the receiver gently.

For more details, check out:
https://www.byui.edu/human-resources/training-and-development/telephone-etiquette

Chapter/Week 3 Communication and Writing Skills

Written Communication

Zig Ziglar said, “if you are not willing to learn, no one can help you. If you are determined to learn, no one can stop you.”

Optional Videos: The Writing Skills: Getting Your Message Across Clearly video is a good reference for writing.

Case Study
Dino worked as a cashier in the office of a water department; here is his story:
We have the best and worst customers that come in each day. I spend my day explaining why people need to pay their bills, how to read their water meter so that they can make sure that we are not over-charging them, helping people set up service, taking payments, and creating service tickets. It is crazy busy every day. One day, a lady came in very upset, saying that we were not providing the service that she paid for. After trying to calm her down, she said that she paid for water thinking that she would get both hot and cold water, but she was only getting cold water. I asked her if she had checked to make sure that her water heater was working. She immediately lowered her voice and quietly asked, "Where would I check for that?" Customer service is not just about putting a smile on your face, although that is important. It is about thinking outside the box for a way to help your customers.It is about understanding your message and communicating it effectively.

Proofread all written communication

Regardless of the type of document, email, letter, memo, report, press release, or any other written form of communication, you **must** proofread the document to check for errors. The ability to communicate correctly, both verbally and in writing, is important to any career. In writing, you should eschew obfuscation (avoid confusion) and use plain language so there is no mistake with understanding or translating your document.

Other clunky phrases to avoid	**Replace clunky phrase with**
I am disinclined to acquiesce to your request	no
In terms of	about
The fact that	because
In order to	to
At the end of the day	ultimately
First and foremost	First
It is important to note that	Importantly
In actual fact	In fact
Inasmuch as	Since
In excess of	over
Whether or not	Whether
Needless to say	
In the process of	

Word Choice: Use active voice rather than passive voice. Active voice is more direct and more easily understood especially when translated to other languages. In the active voice, action is being taken. In the passive voice, something is being acted upon. For example, review the image below:

Passive Voice	Active Voice
The money was counted by the cashier.	The cashier counted the money.
The report was sent by the committee.	The committee sent the report.

Capitalization: Capitalization's purpose is to show the reader the importance of different words. There are rules for capitalization. Google and Kleenex are the names of companies and should be capitalized. However, if I ask you to google (search) something or hand me a kleenex (tissue) I am not talking about the company and therefore do not need to capitalize the name.

Some other rules for capitalization include:
- Capitalize names (people, places, businesses, countries) and proper nouns
- Capitalize the first word after punctuation.
- Capitalize days of the week and months of the year and holidays
- Capitalize titles (Dr., Mrs.,) when used before names such as 'President Regan is speaking'. Do not capitalize titles when the title is used in place of a name such as 'The president will address the senate'.

Punctuation: Punctuation's purpose is to show the reader how sentences are constructed and therefore how the sentence should be read. There are rules for using punctuation. For example,
Let's eat grandma! This means we plan on eating grandma.
Let's eat, grandma! This means we are telling grandma we are ready to eat.

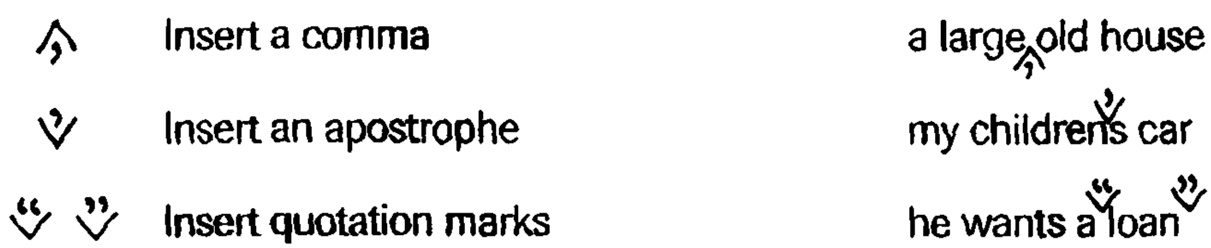
Punctuation can include the following:
- Apostrophes
- Commas
- Parentheses

Spelling: Microsoft Word and Google Docs have a pretty robust spellchecker which will underline misspelled words in red (grammar errors are underlined in blue). However, spellcheck does not catch a word spelled correctly but used incorrectly. Homophones are words spelled similarly but with different meanings such as to, too, and two; or their, there, and they're. With Google (name of a company must be capitalized) at your fingertips, it is easy to look up any word to verify the spelling (and meaning). For example, google (google is used as a verb here and not a name so it does not need to be capitalized) *advice* vs *advise* to learn which is a noun and which is a verb.

Typical errors include capitalization, grammar, punctuation, and spelling, but these are not the only errors to find and correct. You also need to proofread for the following:
- Accuracy of information
    - Names spelled correctly
    - Numbers added correctly
    - Dates correct
- Formatting
    - Headings and subheadings
    - Quotes
    - Tables and figures
    - Page numbers
- Style

- Letterhead
- Logos
- Signature lines
- Lists
- Plain English used
- Widows and orphans used correctly

If someone else edits your documents, they may return the document to you with proofreading symbols to indicate changes to make. You may need to proofread your own document. One suggestion for proofreading is to read the document out loud. Reading out loud forces you to say each word individually and will increase the odds of you finding a mistake.



By Edward Gain - Own work, CC BY-SA 4.0, as found on [Wikimedia.org]

Noun/Verb Agreement: Nouns must agree in tense with their verbs. This means a singular noun such as ‘bird’ requires a singular verb such as ‘flies’. A plural noun such as ‘birds’ needs a plural verb such as ‘fly’.

W03 Activity: Proofread Quiz

Return to Canvas and take the W03 Quiz: Proofreading.

Complete the quiz before working on the next activity.

W03 Activity: Proofread Email

Background
A coworker is sending out an email to the CEO of the company about switching to e-letters. She asked you to proofread the email.

Instructions

1. **Copy and Paste** the email found in Appendix D into an MS Word document.
2. **Edit** the document as needed for use in an office setting.
3. **Show** all your suggested changes by using "Track Changes" in the Review tab of MS Word. An example is in Appendix D.
4. **Correct** all the mistakes.
    a. For additional help refer to the Proofreading section.
    b. If you do not recognize a word, replace the word with a better word choice.
    c. Replace pronouns when necessary for clarity.

Review the rubric to ensure you have met the grading criteria.

Submit: Return to Canvas and submit your rewritten email in MS Word in the W03 Activity: Proofread Email

Business Communication

Business Letters: Email is replacing many forms of business communication, but there are still many use cases for a business letter. A business letter is always more formal and professional than an email. Letter and email writing occupies at least one-third of all office work, and good writing is the most effective advertisement of your capability. Improving your writing skills is an important skill to enhance your and your company's professionalism. A poorly worded letter gives a poor image of the writer and the company. A well-written letter portrays a better image of the writer and the company.

Your employer may dictate a letter for you to type or may ask you to write a first draft. However, before typing the actual letter, plan the letter.

1. What is the purpose of the letter? Is the letter to serve the sender (your company) or the receiver? Is the letter to give or request information? Is the letter providing action or asking for action?
2. The first sentence should state the letter's purpose clearly.
3. The last sentence should not end with a question.
4. Do not use sarcasm or slang. You don't know how the receiver will interpret it and it may seem derogatory.

It is not enough to have correct capitalization, good grammar, proper punctuation, and superb spelling, you also need to learn the techniques of letter writing. Any letter representing your company needs to have a professional appearance. Most likely, your company will have already adopted a letterhead, logo, and style of writing to increase brand recognition with its clients and stakeholders. While the basics of a letter are similar across organizations (an example is given in this chapter), you need to find out the details of the style of writing your company uses including what size and type of font, margin space, single or double spaced, block or indented paragraphs, and preferred closing message.

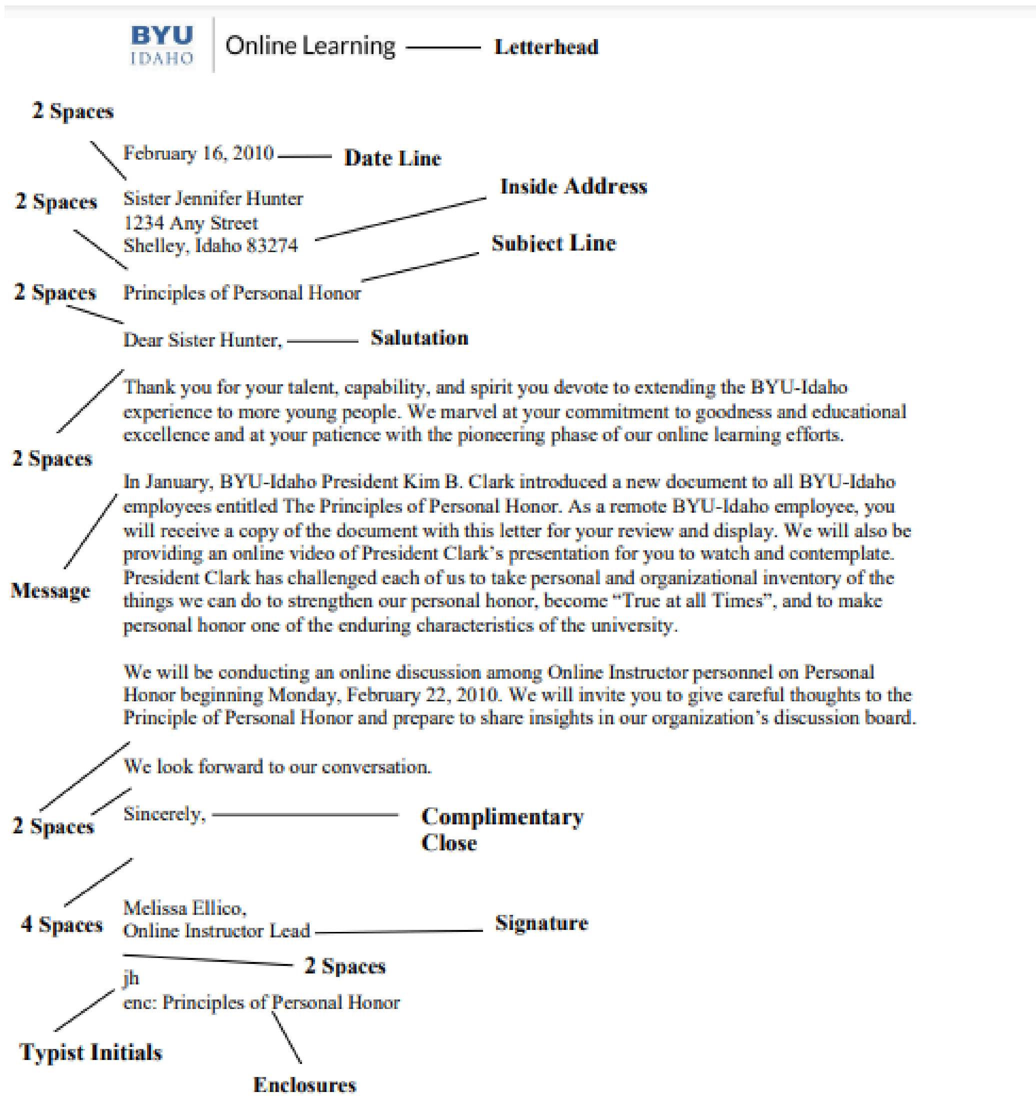
Legal Letters: Legal forms of communication such as contracts and wills require additional formatting and have additional specifications. If your company uses legal documents, they most likely have a template already in place. It is best to work with the company or experienced administrative assistant if you are assigned to work on legal documents.

Routine Letters: Business letters are formal representations of the company and your employer. However, there is routine communication in the form of emails and letters you can handle without dictation from your employer. As you become confident drafting high-quality correspondence, let your boss know you are ready to take on more responsibility. One example of increased responsibility is to take on routine letters your employer does not need to dictate. This correspondence includes acknowledgment letters, appointment requests, follow up letters, and thank you letters.

Template Letters: When you type similar letters to multiple people, you may save time by creating a template and saving it on your computer. For example, if your employer uses both block and modified block style letters, having a template for each style will prevent you from wasting time in the future with formatting. The template will save all the formatting for you.

Templates also work for the body of the letter. Microsoft Word has example templates for a multitude of letters including condolences, congratulations, and accepting or declining invitations.

Sample Business Letter with labels



February 16, 2010

Sister Jennifer Hunter
1234 Any Street
Shelley, Idaho 83274

Principles of Personal Honor

Dear Sister Hunter,

Thank you for your talent, capability, and spirit you devote to extending the BYU-Idaho experience to more young people. We marvel at your commitment to goodness and educational excellence and at your patience with the pioneering phase of our online learning efforts.

In January, BYU-Idaho President Kim B. Clark introduced a new document to all BYU-Idaho employees entitled The Principles of Personal Honor. As a remote BYU-Idaho employee, you will receive a copy of the document with this letter for your review and display. We will also be providing an online video of President Clark's presentation for you to watch and contemplate. President Clark has challenged each of us to take personal and organizational inventory of the things we can do to strengthen our personal honor, become "True at all Times", and to make personal honor one of the enduring characteristics of the university.

We will be conducting an online discussion among Online Instructor personnel on Personal Honor beginning Monday, February 22, 2010. We will invite you to give careful thoughts to the Principle of Personal Honor and prepare to share insights in our organization's discussion board.

We look forward to our conversation.

Sincerely,

Melissa Ellico,
Online Instructor Lead

jh
enc: Principles of Personal Honor

Business Letter Parts Explanation

1. **Letterhead**: The printed heading on the top of paper stating an organization's name and address.
    a. **Sender's address**: If the company doesn't have a letterhead, then the sender's name would appear at the top of the letter (at least one inch from the top of the paper), the next line would be the street address, and the third line would be the city, state or country, and zip code.
2. **Date**: Two to six spaces below the bottom of the letterhead. The date format should always have the month spelled out and four digits for the year. A date is always required.

3. **Reference**: An account number or some other numerical reference would go one space below the date. A reference line is not always required.
4. **Special Notations**: One space below the reference line or two lines below the date. Special notations are not always required.
5. **Inside Address**: This is the address to whom you are sending the letter.
    a. If you are sending the letter to an individual, the individual's name and title are the top line, followed by a company name (if applicable), then the street address on the next line and the last line is the city, state or county, and zip code.
    b. If you are sending the letter to a department name, then the department name would go on the first line of the inside address.
        i. If you are sending to a department but have an individual name, the individual name would go on an attention line one space below the inside address.
6. **Subject**: A short one-line summary overview of the contents of the letter and should be one space below the inside address. For example, Past Due Account or Stockholders' Share Prices Increase.
7. **Salutation**: The greeting at the start of the letter, found one space below the subject.
    a. The salutation should match the formality of the relationship. Don't address the letter *Dear Becky* to the Chair of the Board. Alternatively, there is no need to address the letter *To Mr. R.V. Winston* when writing a condolence letter to a long standing customer you see every month.
8. **Body**: The body of your letter provides all the necessary details in the proper format starting the space line below the salutation.
9. **Complimentary Closing**: Signals the end of the letter and is two spaces below the last line of the body.
10. **Signature Block**: Includes the sender's name on the first line and the sender's title on the second line. There are four spaces between the complimentary close and the signature block. This space is for the signed signature of the sender.
    a. The sender is generally a department supervisor, your employer, or a vice president for the company. You type and prepare the letter, however, in most cases the sender will sign the letter. If you, as the administrative assistant, are signing the letter, the type name should read Administrative Assistant to Mr. Employer.
11. **Identification Initials**: The initials of the person preparing the letter appear two spaces below the signature block and only on the file copy, not the actual letter sent. The employer's initials are in all caps and the administrative assistant initials are in lower case.
12. **Enclosure Notation**: The last line of the letter indicating if there is additional information included. For example, enclosures: three pamphlets.

13. **Postscript**: If you forgot to add something to the letter, rewrite the letter. Do not add forgotten items in a P.S.
14. **Copy Notation**: Similar to cc and bcc on an email, a copy notation lets the receiver know who is receiving a copy of the letter. For example, cc: President Donald Trump.

Business Letter Parts Additional Tips

- Inside address
    - Never abbreviate a company name.
    - If the street is numerical separate the unit number from the street number with a dash. 1234-5th Street
    - Never abbreviate the city or state (states are abbreviated on the envelope but not in the letter)
    - Never use % to represent "In Care Of".
- Reference and Attention
    - Do not abbreviate "Reference."
    - Do not abbreviate "Attention."
- Salutation
    - Titles go at the beginning of a name, for example, Dr. Jennifer Hunter.
    - Initials go at the end of a name, for example, Jennifer Hunter, Ph.D.
    - Never use titles and initials together.
    - Never abbreviate business titles, for example, Jane Doe, Vice President.
    - Reverend and Honorable are titles of respect and are preceded by the word the, for example, The Reverend Martin Luther King or The Honorable John Marshall. (Honorable may only be used for a select number of positions.)
    - Address men with Mr. and women with Ms. and then full name, for example, Ms. Jennifer Hunter.
        - If you don't know the gender then use the full name, for example, Dear Pat Smith.
    - Follow the salutation, in business letters with a colon (:) and in personal letters with a comma (,). For example, Dear Governor Herbert: or Dear John,
    - If you don't know who the letter should go to, use To Whom It May Concern:
- Body or Contents
    - Generally, one-inch margins on all sides (top margin is the only variable depending on letterhead).
    - Use of we, us, or our indicates the company, not an individual, is writing the letter.
    - Use proper capitalization, grammar, punctuation, and spelling.
    - Use concise language
        - Ease instead of alleviate

        - Must instead of compulsory
        - Harmful instead of detrimental
        - Use instead of utilize
- Complimentary Close
    - When writing to an individual, you can close with Sincerely.
    - When writing to a business, you can close with Respectfully.
    - Avoid Yours Truly and Cordially Yours for business letters.
- Signature Block
    - The individual signs their name between the Complimentary Closing and their typed name.

Business Letter Final Tips:

- Read the letter out loud before sending it. If it doesn't sound right to you, it won't sound right to the receiver.
- If in doubt, ask someone else to read your letter before sending it.
- Fold the letter in thirds with the text on the inside of the fold.
    - The standard-sized letter is 8 ½ by 11 inches.
    - The standard-sized envelope is a No. 10 (4 ½ by 9 ½ inches)

Reports

There are a variety of reports you may compile for your employer. Everything from a short, one-page report on a policy change to a long, multi-page report for the current tax year accounting. Short reports could be delivered in a memo. Long reports generally have a title page, table of contents, list of tables, list of figures, report body, conclusion or recommendation, appendix, citations, and index. Depending on the type of report, there could be additional pages required as part of the report.

Formatting of reports include the following:

- Headings and subheadings are a way to organize the content for ease of finding pertinent information. The style of formatting will determine the formatting of headings. Find out which formatting style your company uses. Formatting styles indicate how to correctly do the following:
    - Cite sources within the report and at the end of the report.
    - Format table of contents, table of figures, and table of tables.
    - Know when to use footnotes (bottom of the page) and endnotes (end of the report).
- For the body of the report, use a size 12 font.
- Use a serif font for headings. Serif fonts have extending features called serifs at the end of letters. Times New Roman is a good example of a serif font. The serifs make individual letters more distinct and our brains spend less time recognizing letters and therefore are easier to read.

- Use a sans serif for texts. Sans means *without*, so a sans serif font does not have the extending features. Arial is a good example of a sans serif font.
- Reports can be single or double spaced. Find out which your company prefers for written reports.
- All margins are one inch (except the first-page top margin is two inches).
- Paragraph indentation is five spaces.
- Bullet and number lists indentation is 10 spaces.
- Quotations less than three lines stay in the line of text.
- Quotations three lines or more are single-spaced and offset from both the right and left margins five spaces.

[Name]
BUS129
[Report]
[Date]

Title

[Introduction-what you are talking about]

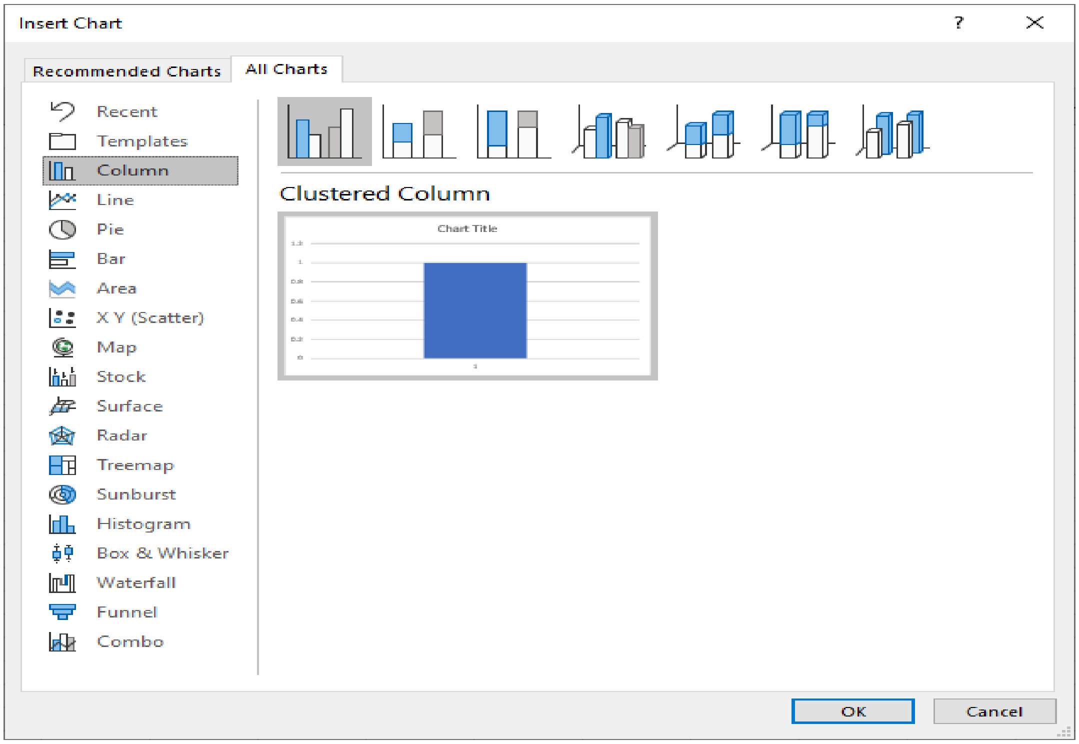
[Paragraph-Supporting Idea #1]

[Paragraph-Supporting Idea #2]

[Paragraph-Supporting Idea #3]

[Conclusion-restate what you talked about]

Math is an important part of managing a business. Administrative assistants may use business math when preparing reports. Most business math calculations can be accomplished with a simple calculator or a spreadsheet such as Google Sheets or Microsoft Excel. Spreadsheets will allow you to perform calculations on large groups of numbers. With the use of spreadsheets, data can be converted into appealing charts and graphs. The type of chart you want to use depends on the data you want to display. Below is a screenshot of all the charts available in Microsoft Excel.



Caption: Screenshot of all the charts available in Microsoft Excel.

Press Release

A press release is a short news story sent to the media for publication. The goal of a press release is to gain the attention of the reader. A press release may be used to announce a new service, product, or philanthropic venture of the company. In a press release, always answer who, what, where, when, why, and how much. A press release is generally only one page and more similar to a memo than a letter with the name, address, phone number, and email at the top of the page. Rather than the word memo, the words Press Release would appear at the top of the page with the date to release the information. If the press release goes to a second page (not recommended, as shorter is better) then the word MORE is typed in all caps, centered, at the bottom of the first page. At the end of the press release type three-pound or number signs (###) or -end-.

Memos

A memorandum is a written message used in a business office. Memorandums are referred to as memos for short. A memo is more formal than an email but less formal than a business letter. The format of a memo is much simpler than a business letter and very similar to an email. You write *Memo* or *Memorandum* at the top of the page, followed by a To line, a From line, a Date line, a Subject line, and then the actual body of the message. Traditionally, you would print out a memo and distribute it to the relevant parties inside your company.

MARCH 1, 2020

TO:	ALL EMPLOYESS
FROM:	MELISSA ELLICO
SUBJECT:	PASSWORDS
CC:	FILE

For higher security, the password settings will change on April 1, 2020. Changing your password regularly reduces your risk of exposure and avoids several dangers for the company not limited to hacking, phishing, and spam attempts.

The benefits of changing your password regularly includes:

1. Limits breaches to multiple accounts.
2. Prevents constant access.
3. Prevents use of saved passwords.
4. Limits access gained by keystroke loggers.

As of April 1, 2020, your password will need to be a minimum of 8 characters, including capital and lower case letters, numbers, and at least one special character such as *.

Instant Message

Some companies have an inhouse messaging service to instantly chat with coworkers. Instant messaging works similar to text via cell phone with rapid responses between two people. Instant messaging allows short chats typed with your keyboard while at your desk. Instant messaging is much quicker than email when short answers or information is needed. Generally, people are happy to respond to instant messages because they know it will require a short answer and minimal commitment of time. However, don't abuse instant messaging as the sender. Know when an email is the appropriate communication and when instant messaging is not intrusive to the receiver. Google Messenger and Slack are two applications allowing for instant messaging.

Email

Before You Hit 

Sending emails is a vital part of business communication. Unfortunately, many employees don't know how to use email well nor do they understand the risks of using email inappropriately. Before you hit the send button ask yourself the following questions:

If the messages is addressed to more than one person, does it really need to be? Reply all should be used very sparingly.	Am I angry? If so, save the message as a draft and wait for at least an hour to re-read and rewrite before sending.
Have I reread what I wrote to be sure it is well-written and punctuated accurately?	Could I better accomplish the purpose of the message with a phone call or other method of communication?
Am I covering more than one subject in the email? If yes, consider sending separate message for each subject.	Am I bcc'ing anyone? If yes, how will the primary recipient feel if he or she finds out others received the message?
Am I attaching a file that may be too large for the recipient to receive? Is the attachment in a format that will be difficult fore the recipient to open?	Have I included a subject line that provides the recipient with a useful context for my message.
Following these guidelines will make your emails a more useful and effective business tool.	

Email also provides a written record of workplace communication. Email, in some offices, has replaced memos, phone calls, office visits, and even some meetings. However, don't get stuck in a back and forth email trap. If there is a chance for confusion or you are finding there is a barrier to communicating your message, consider a phone call.

One great advantage of email is the speed in which communication may be sent and received. No longer do we have to wait weeks for monthly reports to be mailed in from satellite offices. With email, you can message one person or groups of people. You can also include hyperlinks and pictures and attach documents in emails.

People don't mind scrolling to read an email, as long as it's relevant and interesting. Make sure your message follows through on the promise in your subject line, and use several short paragraphs if you have a lot to say. Keep to one topic per email. It is better to send multiple emails than combine multiple subjects into one email. When in doubt, challenge yourself to write less and add links that support your topic.

You do not need to respond to an email the instant you get it. According to a recent study, most employees spend at least one-third of their time at work on email. In the Time Management section you learn to check your email only a couple of times per day. You should check often enough to be prompt in responses, but not so often as to be disruptive of other assigned tasks.

Make sure to always check near the end of the work day so people receive a response the same day they sent the message.

Email is not private. Your company pays for the computer and the email and has the right to read all email communications on their system. Your company email belongs to the company. Even if you delete an email, the company can restore it and read it.
You will want to ask your employer how to access your work email. Does the organization use a specific program? Is there off-site web-mail available? Are you allowed to set up email on your cell phone or personal computer? You will need to follow your organization's access policy.

You will want to know the naming conventions used for emails within the company. Is the email convention the full name, last name, first name first, last name and first initial, firstname and last initial, or another variation? Once you know the naming convention, you will know how to find the emails for the company employees. For example if the naming convention is last name and first initial then Jane Doe's email is doej and Jon Smith's email is smithj.

Items to check before sending and email:

1. If the message is addressed to more than one person does it really need to be? Reply all should be used very sparingly.
2. Am I angry? If so, save the message as a draft and return to it at least an hour later.
3. Have I reread what I wrote to be sure it is well written and punctuated correctly?
4. Could I better accomplish the purpose of the message with a phone call or other method of communication?
5. Am I covering more than one subject? If so, consider sending a separate message for each subject.
6. Am I blind copying anyone? If so, how will the primary recipient feel if he or she finds out?
7. Am I attaching a file that may be too large for the recipient to receive? Or in a format that will be difficult for the recipient to open?
8. Have I included a subject line that provides the recipient with a useful context for my message?

Email fields and explanation:
Each email contains the following fields:

To:
CC:
BCC:
Subject:

Below is each field's explanation of use.

To: is the recipient(s) of the email.
CC: stands for carbon copy and comes from the old days when secretaries had to use carbon paper to write identical letters for multiple recipients. CC tells the "To" recipient you are sending the same email to other recipients.
BCC: stands for blind carbon copies and works the same as CC except the "To" recipient will **not** know you are sending the same email to other recipients. In most cases, it is not good etiquette to use BCC to send a secret message behind someone's back.
It is entirely appropriate to use BCC when you need to keep an email address private (in this instance you may not have a "To" email address and instead have "BCC" email address). For example, a professor of a college class may email her entire class, but put the student emails in the BCC field so no student can see another student's email address and thereby protect student's identities according to the Federal Right to Privacy Act (FERPA in the United States).
Subject: Always include a subject so the recipient knows what the email is about and always keep the subject short. You don't need to say "The third quarterly report from the auditing department for 2020" when "2020 Auditing Quarterly Report" will suffice. However, you also need to be specific. Don't just put "meeting" as the subject as there are not enough details. Instead say "Auditing Meeting on Monday."
You can add documents and images as attachments to emails. One word of caution about sending attachments: check the file size before sending. Large attachments can take time to send and to download. Never send an attachment in an email without an explanation in the email what the attachment is for. Make sure to actually attach your document. Many email programs will remind you to attach your document if you use words such as, *please find attached* or *in the attached document*.

Attachments: If, in an email, you receive an attachment you cannot open, check out the extension of the attachment. The extension indicates if you have the appropriate software to open the attachment. For example, if the extension says .doc then you need Microsoft Office software to open the attachment. If you do not have the correct software to open an attachment, reply to the sender and let them know. .bmp, .gif, .jpg, and .png are all extensions for images. Generally, most image applications such as Paint or Photo will open these types of images. Executable file extensions could easily contain viruses and you should use extreme caution before opening. Some executable file extensions include .com, .exe, and .sys.

Below is a list of commonly used extensions and their application to open.
.doc and .docx—Microsoft Word
.mp3—Windows Media Player

.pdf—Adobe Acrobat (Adobe Acrobat Reader is free, though other Adobe products will also open a.pdf)
.pps., ppt and .pptx—Microsoft PowerPoint
.rtf—Microsoft Word or Notepad
.txt—Microsoft Word, WordPad, or Notepad
.xls and .xlsx—Microsoft Excel
.zip—WinZip or other compressed file (do not open a zip file from anyone you do not know as zip files may contain viruses.

Errors: Sometimes an email can not be delivered through the internet and you will be notified via email when this happens. Read the routing information at the top of the email to determine why the email could not be sent. Sometimes the error is from something as simple as not typing in a correct email address such as smith2gmail.com instead of smith@gmail.com. You can correct the error and resend the email. Sometimes it could be that the messaged company doesn't accept attachments, in which case you may need to share the document using a cloud server such as Amazon Web services or Google.

Auto Response: Most email systems will allow you to set up an automated response for when you will be out of the office for an extended period of time such as for a family vacation. The auto response lets the sender of the email know not to expect an immediate response from you. Auto responses may tell the sender who to contact in your absence. Auto responses should be short and to the point. A sample auto response could be the following: *Thank you for your email. I am out of the office attending a conference. I will respond to your email after September 20, 2020. If you need immediate assistance, please contact jane.doe@gmail.com*. If your auto response does not have a place to set up an end date, leave yourself a note to turn off your auto response when you return.

Organization: Similar to folders on your computer, you can also have folders in your email to organize and store emails. Many email programs also have a way to filter emails. One example of a filter is to send spam or junk emails directly to the trash.

Signature: A signature file is a small text file added to the bottom of your email to act as a signature. A signature file should include your name, the company name, and contact information such as an address or phone number. Below is a sample signature from an employee of BYU-Idaho.

Jennifer Hunter
Curriculum Designer
Curriculum Development
BYU-Idaho
(208) 496-1898 | LAM 206B

Read notification: Some email systems allow you to receive notifications when someone has read your email. This works better for internal email systems than external email systems. However, this is just one more layer of emails to organize. We include receipts here only to alert you that sometimes when you receive an email, the sender of the emails receives a receipt when you read the email.

Etiquette: Etiquette is the acceptable code of polite behavior such as saying please and thank you. Etiquette is the acceptable code of polite behavior for the net or internet. Unfortunately, many employees don't know how to use email well, nor do they understand the risks of using it inappropriately. Emails may not be as formal as a letter but the same care should be taken to ensure correctness of formality of content. First and foremost, always double check to make sure you are sending the email to the right person. Though you don't need to include the date and address like you would a letter, you should still have a personal greeting and salutation. Start the email addressing the person by name, similar to how you would greet a person face to face. For example, *Good morning Mr. Smythe.* If it is the first time you have sent an email to this person, then introduce yourself and the reason you are sending them an email. For example, *Good morning Mr. Smythe. I am the new administrative assistant to the Vice President of Marketing for Maytag, Mr. Doe, and he wanted to ensure you had the March 2020 Quarterly Auditing Report.* Salutations are the closing of the email such as Sincerely, Best wishes, or a simple Thank you.

When writing an email to an international audience, always address the recipient respectfully, such as Mr. Mather. Be formal and respectful in your tone. Don't use humor which may not be understood or translated well. Don't make references to cultural items which may not translate well, for example, the Tooth Fairy in the United States is not a tradition in all cultures. Write out the dates such as March 6, 2020. 3/6/2020 means March 6, 2020 in the United States but means June 3, 2020 in Europe. If you discuss finances in your email, be specific about the currency used, such as dollars vs yen. Be aware of time zone differences and be specific. For example, don't just say 5pm, but 5 p.m. mountain daylight time. This allows your recipient to translate the time to their time zone.

Forwarding: Forwarding emails is a time saver allowing you to easily forward information to others without having to retype the message. However, once you forward an email, it basically becomes public. Receive permission from the sender before forwarding their emails. Their message may have been for you only, the tone may not be appropriate for others, or the sender may not want their email shared. Never forward chain letters, hoaxes, jokes, or spam to people at work. It is not professional and you don't know what your coworkers may find offensive. If you don't want an email you sent forwarded, then add a directive to that effect such as "Please do not forward this email." However, you can not control if someone does forward your email, so always be professional and accurate in your email.

Additional tips to keep in mind for email netiquette are as follows:

- Keep the body of the message short and focused on one topic.
- Keep the language gender-neutral. Instead of salesman or stewardess, you would say salesperson or steward. Use they and them instead of he and she when appropriate.
- Always use spell-check.
- Don't use acronyms unless you know the recipient understands them. Using BYUI is acceptable for faculty and current students to say. However, when addressing a new, potential student you may need to say Brigham Young University-Idaho.
- Don't use capital letters, as traditionally all capital letters designate yelling. Few exceptions such as WARNING or CONFIDENTIAL would be acceptable.
- Do not mark all your emails as urgent or high priority. Most emails are just messages. If you have an urgent email you might want to consider if a telephone call would be more appropriate.
- Use plain text, not HTML text.
- Do not use emoticons: they are not professional.
- If you receive an email intended for another person, reply to the sender letting them know you are the wrong recipient for their message.
- Do not use email for flirting, gossiping, requesting a raise, telling jokes, or anything illegal or unethical.

Email Cybersecurity Tips: Never use 1234, password, your name, username, telephone number, cell number, birthdate, or social security number as your password.

One word of caution about email attachments. Never open an attachment from someone you don't know. Attachments may contain viruses harmful to your computer.

The same warning applies to links in emails. Never select a link from someone you don't know. Links may contain viruses harmful to your computer, or the page the link is sending you to may contain a virus.

Internet

“And thus it became expedient that this law should be strictly observed for the safety of their country” (Alma 62:10).

The internet is what allows you to email to people outside your office. The same internet allows you to collect and share information with millions of others across the globe. According to Merriam Webster’s dictionary, the internet is an electronic communications network connecting computer networks and organizational computer facilities around the world. More simply, your office computer, through the internet, is connected to thousands of other computer networks. The internet allows for virtually instantaneous communication and sharing of data across the world. The internet connects business, education, government, libraries, and more.

Wireless networks allow computers to talk to each other without cables. WiFi (short for wireless fidelity) as defined by Merriam Webster’s dictionary is a facility allowing computers, smartphones, or other devices to connect to the internet or communicate with one another wirelessly within a particular area. The connection of your computer to network with other computers will most likely be set up by your company's technology department. The various internet connections are listed below with the fastest connections listed first.

- Satellite modem is a high-speed connection using a satellite subscription service.
- Wireless modem is a high-speed connection using radio and cellular telephone signals.
- Cable modem is a medium speed connection provided by a cable company.
- Digital Subscriber Line (DSL) is a medium-speed connection connecting with telephone lines.

The World Wide Web (WWW), or web for short, is a large portion of the internet traffic in the 21st century. Individuals and businesses alike may have a web presence through personal blogs and company websites. A *web browser* such as Google Chrome, Mozilla Firefox, or Microsoft’s Safari is your access to the internet. One useful tool of web browsers is the ability to bookmark websites you refer to often. Using *search engines* such as Ask.com or Google.com allow you, with just a few keystrokes, to access millions of data.

A *web page* is a document such as this one you are reading. A *website* is an organized group of web pages such as you would find at byui.edu. All websites have a unique Universal Resource Locator (URL) allowing you to find their address. http://www.byui.edu is an example of a URL. The URL is the web address to locate a particular website. Generally, you can just type byui.edu and not have to worry about typing the http or the www to get to the correct website.

The *extension* is the letters after the period(.). For byui.edu, the extension is .edu. The .edu represents an education site. Some commonly used extensions and their meanings are listed below, this is not a complete list:
.biz = business
.com = commercial
.edu = educational institution (generally colleges and universities)
.gov = government
.org = organization
The extension is important. Whitehouse.com is a pornography site (or was at one time) whereas whitehouse.gov will take you to a website for the government of the United States.

The links within web pages that allow you to jump to other pages are made possible through HyperText Markup Language (HTML). A link is usually in blue font and underlined. (Because links are underlined, you should not use underline for emphasis in your documents as people may think the underlined text represents a link.)

When you visit a website, your browser stores information about your visit on your computer. This is why when you return to the same site it may autofill information for you. Storing this information is called cookies, referring to the crumbs cookies leave behind. Every time you visit a website, you leave a trail of digital crumbs behind too. Marketers use this information to learn your preferences to better sell you products. You can set your browser to disable cookies if you wish.

Ethics

According to the Oxford dictionary, ethics is the moral principles that govern a person's behavior. Ethics are what guide us to tell the truth, keep our promises, and help someone in need. Ethics help us make wise decisions creating positive impacts.

True Story

In the small town of Dixon, Illinois, an embezzlement scheme was discovered when a longtime and trusted city employee took an extended vacation and her substitute discovered irregularities in the accounts. The FBI was called and investigated for five months.

Over a 16-year period, it is estimated that $53 million was stolen from this small town. Instead of being spent on city services, the money was spent on prize-winning horses, jewelry, and a $2 million motorhome.

For years, the police department had begged for new squad cars and uniforms. The chief was told there was no money. City employees in Dixon had gone without raises for years.

You will now work on an assignment about ethics and submit it in report form.

W03 Activity: Ethics Report
Background Your manager has asked for everyone in the company to provide ideas of how to prevent embezzlement in the company.
Instructions
1. **Read** more about the Dixon, Illinois city employee embezzlement scheme. 2. **Reflect** on the following questions. a. Why was the embezzlement not caught for over 10 years? b. How was the embezzlement finally discovered? c. Have you ever been in or witnessed a situation like this? d. Reflect on your own ethics. What are your best qualities? Are there areas you might improve? e. If you would like to know more about this incident you could watch the YouTube documentary "All the Queen's Horses". 3. **Read** the article: 25 Examples of Embezzlement and Workplace Theft. 4. **Reflect** on the following questions: a. How can the gospel of Jesus Christ help us prevent bad behavior in our workplace? b. How can the covenants you make as a member of The Church of Jesus Christ of Latter-day Saints help you make good decisions in the workplace so you can gain self-confidence and be a positive influence on others? 5. **Write:** In an MS Word document, write a report (see basic report layout under the Reports section in Chapter 3) with at least five suggestions for preventing embezzlement at your place of employment. You are not giving instructions to your employer or to your co-workers. You are offering at least 5 suggestions to add value to the company based on your research.
Review the rubric to ensure you have met the grading criteria. **Submit:** Return to Canvas and submit your one to two page report in MS Word in the W03 Activity: Ethics Report

Cybersecurity

With the use of the internet comes the responsibility to protect yourself and your employer against computer threats such as viruses and phishing. Information about your company is valuable to your company and to people who want to get access to the information for fun or gain. Some unsavory people will try to hack your company's data just for fun to see if they can hack the security system. Other deceitful people want to hack your company's data and then blackmail you for money. According to Merriam Webster's dictionary, cybersecurity is the state of being protected against the unauthorized use of electronic data. It is important to understand the ways computer crimes are manufactured so you may protect yourself and your company.

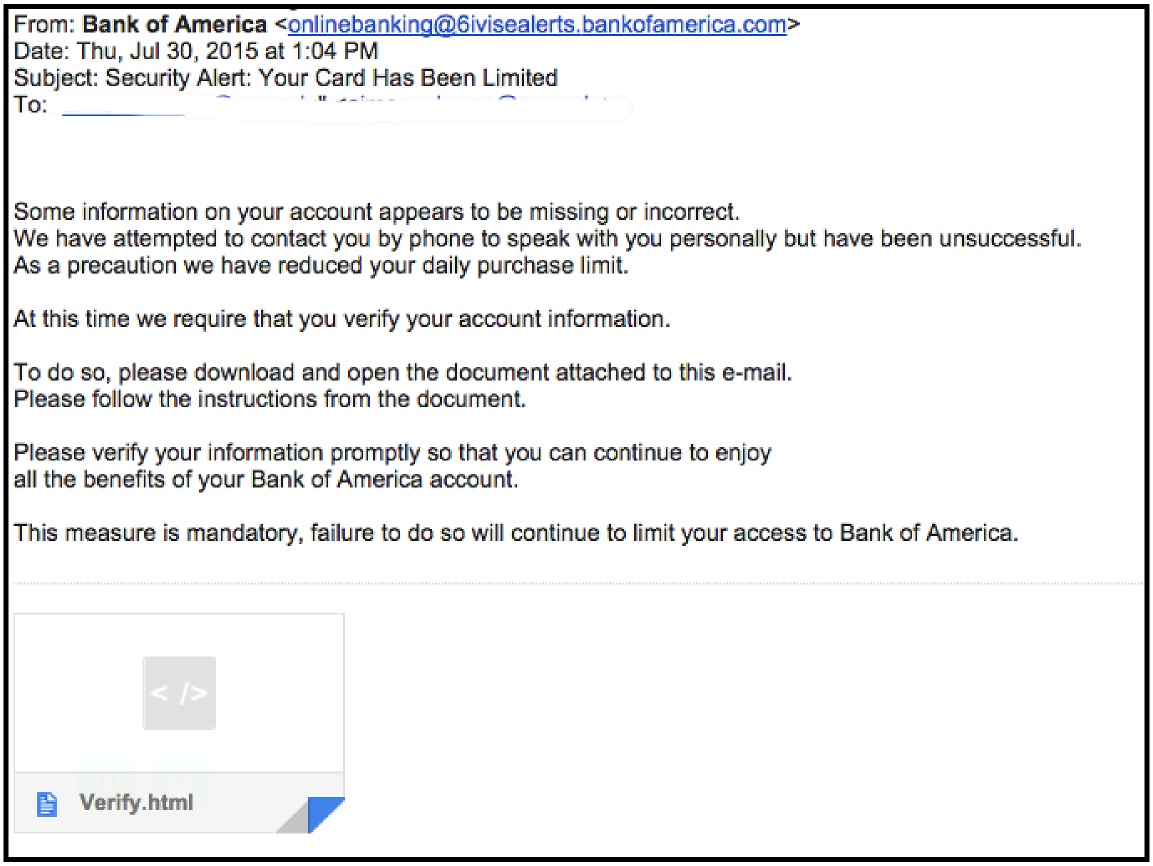
Some ways to receive cyber attacks include the following:

- **Malware**: Malicious software could encrypt your data and then you have to pay to unencrypt the data or it could install a virus.
- **Phishing**: An attempt to acquire information, generally personal or confidential information.
- **Piracy**: Making unauthorized copies of programs. (The piracy cost to the film industry alone is over 29 billion dollars.)
- **Spyware**: A type of software installed on a computer to collect information without you knowing.
- **Virus**: Similar to a biological virus affecting humans, computer viruses infect a computer's memory which in turn can erode data.

Social engineering is the use of deception to manipulate individuals into divulging confidential or personal information.

Some examples of social engineering include the following:

- Someone pretending to be from a hotel front desk asking for your credit card information. *Walk back down to the lobby and talk to the employees in person. They might be really interested to know someone is using their good name to hurt their customers.*
- Someone pretending to be from HR and asking for confidential information. *A credible human resource department would never ask for confidential information via email.*
- Someone pretending to be from the IT help desk and asking for a password. *Your IT department will never ask for your password. They are also charged with keeping information confidential.*
- Someone sending a forged email that appears to come from your bank, such as seen in the example below. The email in the image below did **not** come from Bank of America. Can you find the clues to let you know this email was not from Bank of America? *Call your bank directly or visit your bank and verify your account is secure.*



From: **Bank of America** <onlinebanking@6ivisealerts.bankofamerica.com>
Date: Thu, Jul 30, 2015 at 1:04 PM
Subject: Security Alert: Your Card Has Been Limited
To:

Some information on your account appears to be missing or incorrect.
We have attempted to contact you by phone to speak with you personally but have been unsuccessful.
As a precaution we have reduced your daily purchase limit.

At this time we require that you verify your account information.

To do so, please download and open the document attached to this e-mail.
Please follow the instructions from the document.

Please verify your information promptly so that you can continue to enjoy
all the benefits of your Bank of America account.

This measure is mandatory, failure to do so will continue to limit your access to Bank of America.

Verify.html

- Someone sending a forged email that appears to come from a friend or family member asking you to open an attachment or select a link. *If it looks suspicious, call and ask them first if they sent you something.*
- Someone looking at your social media. *You may not share it all in one place but if someone were to read your Facebook page they could get clues to your password(s), the times you are away from home on vacation, and even your home address.*
- Someone looking through your garbage. *Do not throw away mail with your address on it. Shred it. It only takes three pieces of information to hack your identity; 1. Your address, 2. Your social security number, and 3. Your birthdate.*

The bad guys are targeting anybody who will grant them access to a desktop, laptop, tablet, cell phone, or any other device which will connect to the internet. You can grant them access as easily as clicking on a link in an email or on a webpage. People will use dubious methods to get information on your computer for a variety of reasons including the following:

- Use your computer to attack other computers.
- Steal account credentials.
- Invade your privacy.

Phishing occurs when a malicious message is sent, claiming to be from a legitimate source. The cybercriminals sending these messages want your personal information to access important accounts, exploit money, or tamper with valuable resources. Scams like these can happen via email, telephone, text message, or any other technological means that allows criminals to mask their identity.

The best way to avoid falling for phishing scams is to know what to look for. Be wary of messages that do the following:

- Claim your information has been compromised.
- Offer something too good to be true.
- Come from an unfamiliar sender.
- Come from a similar, but incorrect address (for example, burgenerk@byui.gmail.com).
- Include spelling or grammar mistakes.
- Contain suspicious links or attached files.
- Use urgent words and phrases like ASAP or immediately.
- Ask for money, gift cards, or sensitive information.

Many legitimate messages may contain a few of the items above; however, the more of these items you see, the more likely it is to be a scam. Exercise caution and use good judgment, especially when working remotely and using digital tools to communicate.

There are many misconceptions why people believe they or their company are not at risk. Some of those misconceptions include the following:

- We don't have anything that anybody would want. Your company has files about customers, income, products, sales, services, strategies which make the company profitable. If this data were stolen by a competitor, your company could be severely hurt.
- We are a smaller organization and there are bigger targets. Smaller companies generally don't have as robust security systems and therefore are easier to hack.
- Our network defenses will keep all of the bad guys out. Sometimes the bad guys are former, disgruntled employees who know their way around your system.
- It won't happen to me. There were over 14 million hacks in 2019 alone resulting in 4 billion records obtained illegally. (Optional: US.Norton.com article)
- There won't be any real harm if we lose some data. Some hospitals maintain a lot of personal data on patients such as birthdates, home addresses, and social security numbers which is all someone needs to steal an identity, so it may not be your company data the bad guys are after. However, if you do not secure your clients' data, you could be at risk.

There are some industry regulations protecting data, and if you work with any of this type of information, you are responsible to help protect the data. It is also just good business sense to maintain data in a secure manner to build credibility and trust with your clients and stakeholders.

- PCI (Payment Card Industry Security Standard)
- HIPAA (Health Insurance Portability and Accountability Act)
- GLBA (Gramm-Leach-Bliley Act) also known as the Financial Modernization Act of 1999)
- FERPA (Federal Educational Rights and Privacy Act)

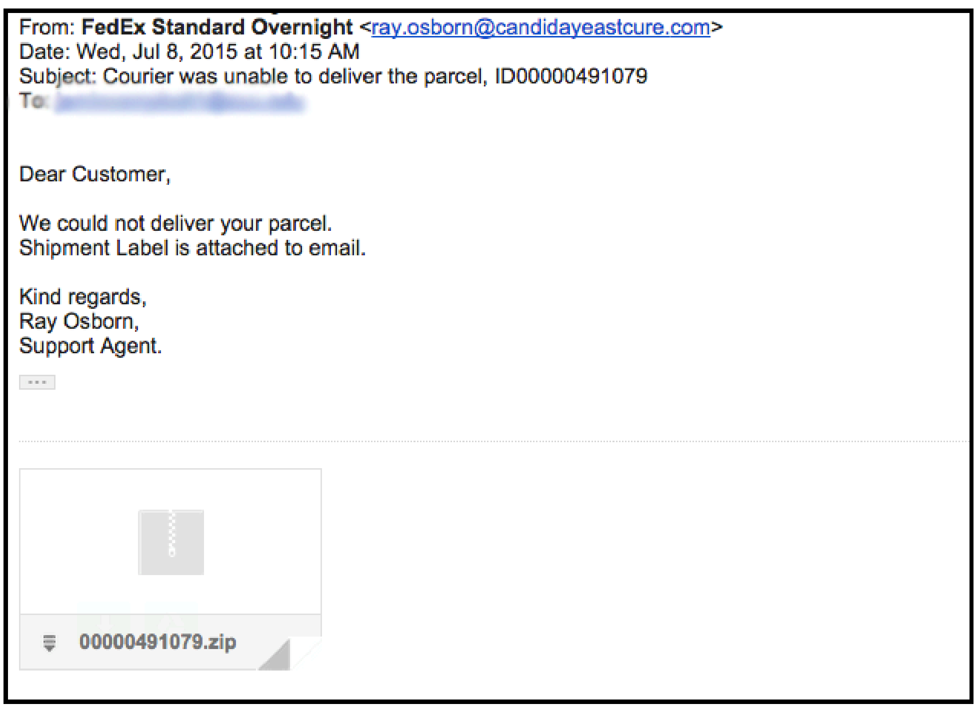
Along with keeping your company's information protected you should also restrict who has access to your personal and/or sensitive information.

PII—Personally Identifiable Information includes the following:

1. Social Security Numbers
2. Credit Card Numbers
3. Drivers License Numbers
4. Passport Numbers
5. Health Information

When someone asks for your PII, ask yourself if they really need that information. For example, a hotel needs my credit card number but not my social security number. PII should never be sent via email.

Email is probably the most commonly attacked because it is super easy to spoof a **from** email address. The following is a real email, which appears to be from FedEx, but can you tell who really sent the email? Hint: look at the link in the From line.



From: **FedEx Standard Overnight** <ray.osborn@candidayeastcure.com>
Date: Wed, Jul 8, 2015 at 10:15 AM
Subject: Courier was unable to deliver the parcel, ID00000491079
To:

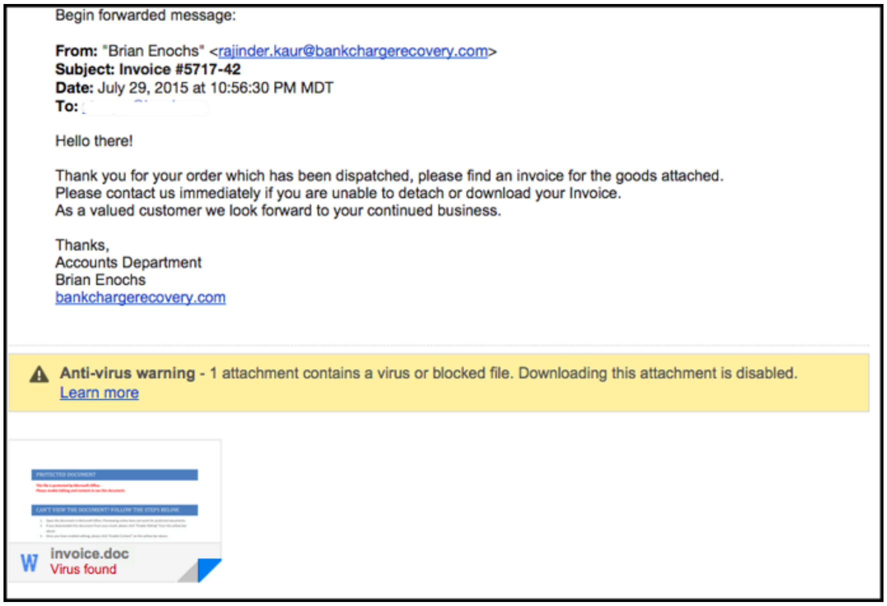
Dear Customer,

We could not deliver your parcel.
Shipment Label is attached to email.

Kind regards,
Ray Osborn,
Support Agent.

00000491079.zip

E-mails can contain attachments or web links. Attachments and links could contain a virus. Luckily, in the example below, the Google AV scanners flagged this attachment with a warning (see the light yellow highlight in the image below) so the receiver knew not to open it.



Begin forwarded message:

From: "Brian Enochs" <rajinder.kaur@bankchargerecovery.com>
Subject: Invoice #5717-42
Date: July 29, 2015 at 10:56:30 PM MDT
To:

Hello there!

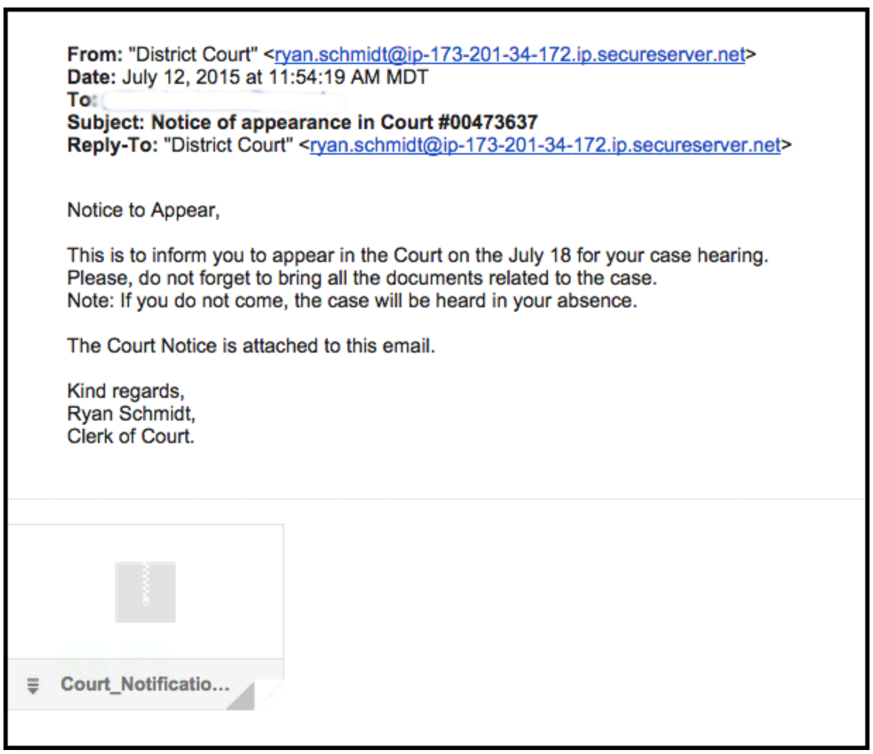
Thank you for your order which has been dispatched, please find an invoice for the goods attached.
Please contact us immediately if you are unable to detach or download your Invoice.
As a valued customer we look forward to your continued business.

Thanks,
Accounts Department
Brian Enochs
bankchargerecovery.com

Anti-virus warning - 1 attachment contains a virus or blocked file. Downloading this attachment is disabled.
Learn more

invoice.doc
Virus found

Hoax emails can look very real and sound genuine. When it appears to be from the court or government, there is an added level of social engineering when something appears to be a threat such as the example below.



From: "District Court" <ryan.schmidt@ip-173-201-34-172.ip.secureserver.net>
Date: July 12, 2015 at 11:54:19 AM MDT
To:
Subject: Notice of appearance in Court #00473637
Reply-To: "District Court" <ryan.schmidt@ip-173-201-34-172.ip.secureserver.net>

Notice to Appear,

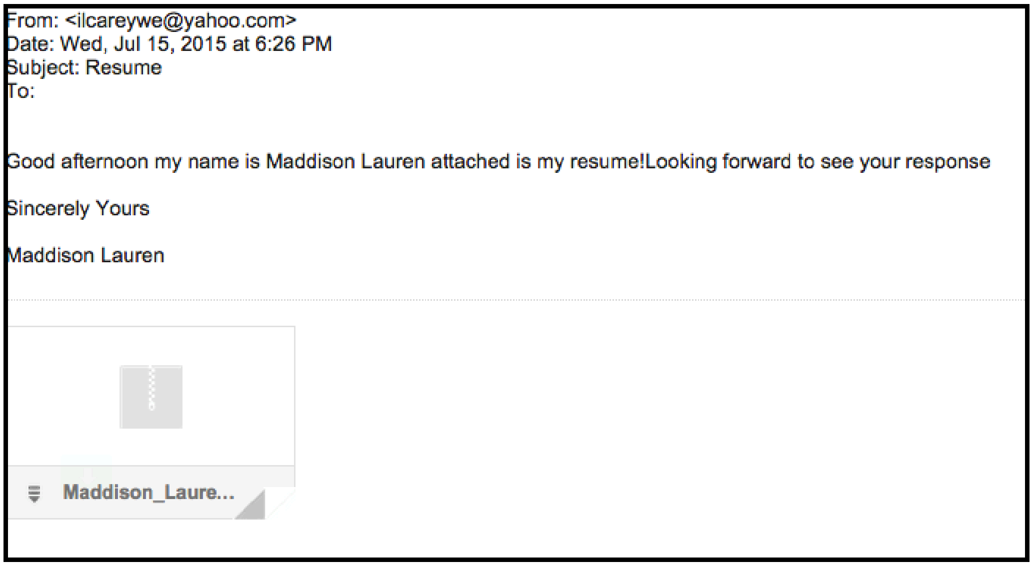
This is to inform you to appear in the Court on the July 18 for your case hearing.
Please, do not forget to bring all the documents related to the case.
Note: If you do not come, the case will be heard in your absence.

The Court Notice is attached to this email.

Kind regards,
Ryan Schmidt,
Clerk of Court.

Court_Notificatio...

Phishing is when the miscreants send legitimate-looking emails from legitimate-looking addresses to try and get you to give up sensitive information or download a virus. The email below looks innocent enough, someone submitting their résumé, but if you do not know the sender of the email and if you don't regularly accept résumés, then this is probably an email with a link with malicious intent.



From: <ilcareywe@yahoo.com>
Date: Wed, Jul 15, 2015 at 6:26 PM
Subject: Resume
To:

Good afternoon my name is Maddison Lauren attached is my resume!Looking forward to see your response

Sincerely Yours

Maddison Lauren

Maddison_Laure...

One way to protect ourselves and our company is with robust passwords. "Password" and "1234" are not very secure and easily hacked. Passwords should not be kept on a piece of paper under your phone or keyboard as this is the first place a bad person looks. It is better to have a passphrase rather than a password. For example, BYUICARSOCCER. To make it more secure use some lowercase and uppercase letters such as BYUIcarSoccer. To make it even more secure use numbers and symbols such as BYU1carS*cc3r!. A longer password is better than a complex password. An 8 character password has 221 trillion combinations but a 12 character password has over 3 sextillion combinations.

Use different passwords for different programs, for example, your Facebook and bank password should **not** be the same. Be careful of the security questions, it is not hard to find your mother's maiden name or the street you lived on in grade school. Both your mother's maiden name and your former addresses are part of your credit bureau.
In summary, some ways to protect yourself and your company include the following:

- Be aware of the kinds of information you handle and follow established company procedures for security.
- Be sure of whom you are communicating with.
- Secure your computer.
- Keep your computer operating system updated.
- Keep browsers updated.
- Keep browser extensions updated.
- Keep all other software updated.
- Remove unused software.
- Use a firewall.

- Use Anti-Virus software (Microsoft Security or Norton Antivirus).
- Use Anti-Malware software.
- Be careful what you download from the Internet (virustotal.com).
- Be aware of social engineering (snopes.com).

The following articles are NOT required reading. The articles are supporting documents to underline the severity of cybersecurity threats. The articles are only in English.

- Trojan Horse
- Hacking baby monitors
- Hacking laptops
- Hospital Records Breach 2008 and 2020
- Former Employee Hacks Company

Chapter/Week 04 Time Management

Time Management

"I will go and do the things which the Lord hath commanded, for I know that the Lord giveth no commandments unto the children of men, save he shall prepare a way for them that they may accomplish the thing which he commandeth them" (1 Nephi 3:7).

Case Study
Jonatan works for a busy architectural firm; here is his story:
I worked for five managers at a new job. I had been with the firm for three weeks. Each afternoon, before leaving work, I would carefully plan my work for the next day. I was having difficulty keeping my plan because of the constant interruptions. One day, a senior manager sent me a large report for final completion with a special request to finish the work by the end of the work day. Another manager also assigned work to me. I was having to skip lunches to try to keep up, and it wasn't making much of a dent. Additionally, the telephone would ring constantly. I found myself very frustrated due to the pressure of all the competing work. I realized I needed to research some time management and stress-reducing techniques to help me navigate this job. I knew if I didn't, I would reach a burn-out point or blow up at my coworkers. Since I didn't want either, I knew I had to work on some time management skills.

Time management isn't just for you as an administrative assistant to keep you on track, but also to help your employer and possibly your colleagues. If you can learn and apply time management techniques, you will work more effectively. Staying busy is not the same as being productive or managing your time wisely. As Forbes reported March 7, 2016, "80% of the results come from 20% of the action." This is otherwise known as the Pareto Principle. With time management, you have more deliberate focus and intentional actions. Using time management techniques to optimize your focus and efforts will increase your productivity and therefore your success.

Optional Videos: The following videos are good references for Time Management

- How to Manage Your Time Better
- 3 Biggest Ways You Waste Time in the Office

Balancing Your Workload

When you find there is more work to do than can be done…

- Analyze: Determine when your workload tends to peak, how often it will occur, and what options are available.

- Plan: Decide if there are preparations you can make in advance of the peak workload to minimize the effect.
- Discuss: If there is no letup in the work, discuss the situation with your manager. Either you are missing opportunities to be more efficient, or you need assistance. Be prepared to offer possible solutions.

Tips for Success

1. Beware of perfectionism. With some work, done timely is better than perfect.
2. Clutter is rarely caused by insufficient space or time. Be selective about what you bring into your office and home. If you know what you value and what your goals are, being selective is not hard.
3. Have a place for everything. Store all office supplies, mail supplies, etc. together to prevent duplicate purchases.
4. Do not use your entire desk surface. Determine your next action on every piece of paper and file accordingly.
5. Handle each piece of paper only once. If you are not going to deal with it immediately, make a note in your calendar or day planner of when you will deal with it.
6. Don't save paper that you're not willing to spend time filing. If you don't file it properly, you either will forget you have it or won't be able to find it when you need it.
7. Use your day planner to help clear your desk. If you avoid filing things out of fear that you'll forget to follow up, jot down a reminder in your appointment book or computer software.
8. Learn to say "no." Saying "no" sometimes is the only way that you can say "yes" to what you really value.
9. Beware of stuff.
    a. Stop buying things you don't really need just because they're on sale.
    b. Do buy more of things you use continually. Purchase things before your supply runs out.
10. Schedule appointments with yourself to get things done.

Prioritization vs Procrastination

People who procrastinate may work as many hours a day as the next person, but procrastinators don’t accomplish as much as those who focus and prioritize. Feeling overwhelmed by a task may cause procrastination, so, determine what about the project is causing the feelings of being overwhelmed and tackle that aspect first. Another strategy is to break the project into chunks and work on one piece at a time.

Simply completing your tasks in the order given to you or the most recent first is not good prioritization, it is just good order. More important tasks should receive priority over less important tasks such as checking email. If you find yourself checking email eight times a day, (or once an hour), you are wasting valuable time. If the employer has given you multiple tasks, ask which ones should receive immediate attention. As you learn your role as administrative assistant and ask good questions, you will find yourself asking less and less questions as you build a good working relationship with your employer.

To-Do List: To create a To-Do List during the first week of new employment and write down everything you are asked to do. Put an asterisk next to everything you are asked to do more than once a week, such as schedule meetings for the department. Put a checkmark next to things you are asked to do daily such as check the mail. This will help you get a feel for your general day-to-day tasks. Each morning, start a To-Do List with everything you need to accomplish that day. Then, prioritize the list into what needs to be done first. If you have large projects, break them down into smaller parts.

Use digital calendars for reminders that will alert you anywhere. With recurring monthly, quarterly, and yearly tasks, make sure to calendar these out as these are often forgotten as time passes.

It is common to want to do easy tasks or tasks you enjoy first. This is not the most efficient way to accomplish your work. To determine priorities, ask yourself the following questions:

- Is this task or project a priority of my immediate supervisor or manager?
- Is this work needed immediately?
- Is this a daily task or a long-range task?
- How much time is required to complete this task?
- Are others involved in the completion of this task?
- Are others waiting for my portion of the task to be completed to complete their portion of a project?
- Is there a specific deadline for this task?

If you are unsure about the answers to these questions you can do the following:

- Ask questions of those involved in the process.
- Study prior direction or documentation, such as an office manual.
- Work with your manager to determine priorities; over time, determine a pattern of priorities.
- Keep a record of how work flows in and out of the office.

Flexibility: It is important to create a plan and then realize that planning needs to be flexible. Recognize that your work schedule is not truly your own. Your plan is governed not only by your manager's objectives and deadlines, but also by the ever changing environment of your office.

Efficiency

Group similar tasks: You can save time and energy by not shifting from one task to another. You can also give these tasks your complete attention by scheduling time for them.

Work at one task at a time: Schedule your work so you can keep at one task until you finish it or until you come to a logical stopping place. Jumping from one task to another is confusing. Additionally, reviewing work to figure out where to begin and recalling what has or has not been done wastes time and energy.

Write down thoughts: As you work on one task, ideas about another task may come to mind. Write down important ideas on your To-Do list so you don't forget, but then continue with the task you are working on.

Work uncluttered: On your immediate work surface, place only the work related to the current project. This helps keep your focus on the task at hand. Put other work aside in an organized and labeled way. Stacking work on top of each other is disorganized and leads to confusion as well as lost time looking for needed work.

End your day well: Before you leave for the day, organize your space. This will allow you to begin your day in an orderly fashion. You will not need to pull yourself together during time that could be used in a productive way.

Start your day with a difficult task: Tackle a task that requires concentration. Complete a task that is difficult or that you dislike. It will be easier with a clear mind. Additionally, completing something hard early gives a boost to your day.

Cope with interruptions: Interruptions are everywhere. Recognize that interruptions are part of the job, and allow time for them in your planning. Keep calm and do not allow interruptions to throw off your day's work. If you find that there are repeated interruptions, consider keeping a log of how much time you spend on each task. This will help in planning and scheduling. Do not treat the interruption as a negative, and be courteous to others.

Do it right the first time: It takes less time to work through something the first time with focus than to try to find an error at the end of a project. Make sure you understand the instructions and the scope of the work so you do not spend time on details that are unnecessary.

Ask the internet: If you feel there could be an easier way to do a task, search for it online. There are many help documents, YouTube videos, and tutorials that can make quick work of what might otherwise be a time consuming manual task.

Calendaring

"Ere you left your room this morning, Did you think to pray? In the name of Christ, our Savior, Did you sue for loving favor As a shield today?" (Hymn 140, Did You Think to Pray)

Case Study
Bella was hired as a receptionist and assistant in an escrow company. Here is her story:
I had observed during my first few days that the employees in the office just took lunch whenever they wanted. No set time, they just left. Being new to the office and naive, I got up and left for lunch one day without letting the others know. When I got back, they let me know that they didn't know I had left, and as the receptionist, they needed to know so they could answer the phone lines when I was gone. First lesson learned: someone has to answer the phone, and that someone was me. I needed to make sure I passed the responsibility on to another before I left my station for lunch. Second lesson learned: lunches that felt like they were at random times were more scheduled than I thought, and I should have checked with others on this too. My manager was forgiving; thank goodness!

Calendar Tips

When making appointments for your employer, it is recommended to put the appointments on their calendar as well as yours. This way, you have a reminder system to let your employer know of important meetings. You also need to learn how much block-time an employer needs before or after a meeting either to prepare for the meeting or to complete assignments from the meeting. If your employer has to travel to a meeting in another building, be sure to block out time for travel as well. For example, if the employer has a meeting at 9:00 a.m., 10:00 a.m., and 11:00 a.m., and the meeting locations are all in different buildings and it takes 15 minutes to walk to each building, you should schedule 45-minute meetings not 60-minute meetings so the employer has time to walk to each meeting. Learn about your manager's habits. For example, if your manager takes lunch every day at 12:30 p.m., you will need to block out that time.

Calendar features also include setting recurring meetings. For example, if every Monday there is a 9:00 a.m. department meeting, rather than make 52 individual meetings (one for each week of the year), you can create one calendar appointment and set it to recur each Monday at 9:00 a.m.

Most calendaring applications also include a setting to schedule a group meeting. If everyone you want to invite uses the same calendaring system, such as Google Calendar or Microsoft Outlook, then you can use the scheduling assistant to find a time when everyone is available to meet. The scheduler assistant will save you hours of trying to coordinate a time. Once the scheduling assistant has found you a time when everyone can meet, you can then set one calendar appointment to appear on everyone's calendar. The calendar functions allow the attendees to accept or reject the appointment time and you will receive notifications for who does and does not plan on attending the meeting. It is recommended to include in the body of the calendar appointment the reason for the meeting and, if possible, link to a meeting agenda as well.

Most calendaring applications also allow you to share calendars. This allows you to see if your employer has available times when setting appointments. The sharing function will often allow you to control how much access someone has to your calendar. You can see the appointment details, or just see *busy*. You can add to the calendar or just send an invitation. This function is helpful across the organization.

W04 Activity: Calendaring

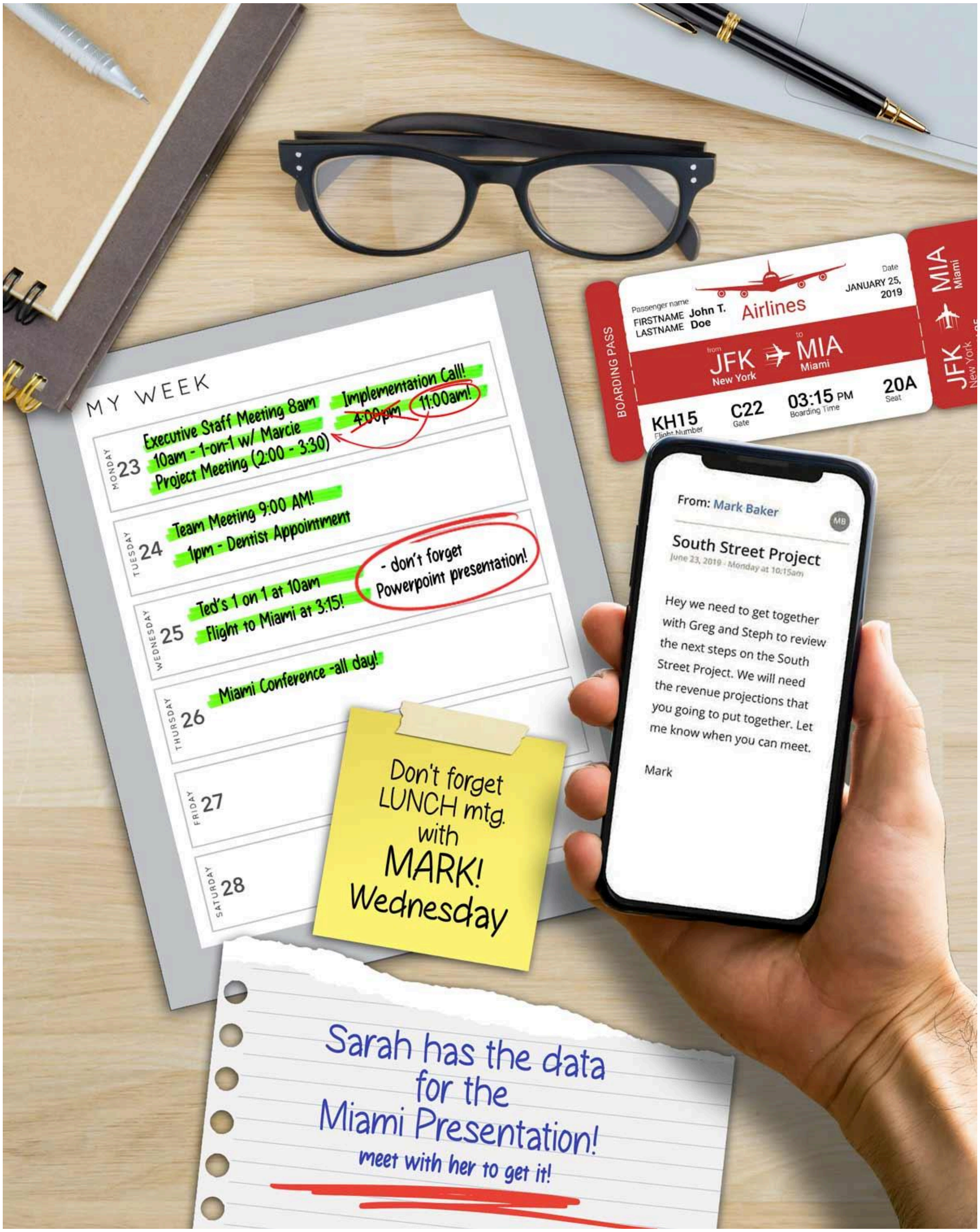
Scenario
Throughout the day, you receive a variety of handwritten notes from your manager that need to be scheduled. You will need to input those into the shared Outlook calendar that you both reference.

Instructions

1. **Review** the items in the image below.
2. **Create** a workable schedule in your Outlook calendar. (If you choose any other calendaring system, such as Apple or Google Calendar, make sure you can save a PDF copy to upload as your assignment for grading.*)*
    a. Include all the items from the image:
        i. The items scheduled in green (on the graphic below)
        ii. Time to meet with Mark
        iii. Time to work on Mark's request
        iv. Time to get data from Sarah
        v. Time to work on a PowerPoint presentation
        vi. Time to leave for the airport
    b. Once appointments have been entered into your calendar, take a screenshot and save it as a PDF. (You should have a total of at least 14 Calendar items)

3. **Review** the rubric in Canvas to ensure all criteria have been met.
4. Optional Tutorial: Welcome to Your Outlook Calendar

Submit: Return to Canvas and submit your Calendar PDF in the W04 Activity: Calendaring


MY WEEK
MONDAY 23
Executive Staff Meeting 8am
10am - 1-on-1 w/ Marcie
Project Meeting (2:00 - 3:30)
Implementation Call!
~~4:00pm~~ 11:00am!
TUESDAY 24
Team Meeting 9:00 AM!
1pm - Dentist Appointment
WEDNESDAY 25
Ted's 1 on 1 at 10am
Flight to Miami at 3:15!
- don't forget Powerpoint presentation!
THURSDAY 26
Miami Conference -all day!
FRIDAY 27
SATURDAY 28
Don't forget LUNCH mtg. with MARK! Wednesday
BOARDING PASS
Passenger name
FIRSTNAME John T.
LASTNAME Doe
Airlines
Date
JANUARY 25, 2019
from JFK New York
to MIA Miami
KH15 Flight Number
C22 Gate
03:15 PM Boarding Time
20A Seat
MIA Miami
JFK New York
From: Mark Baker
South Street Project
Hey we need to get together with Greg and Steph to review the next steps on the South Street Project. We will need the revenue projections that you going to put together. Let me know when you can meet.
Mark
Sarah has the data for the Miami Presentation!
meet with her to get it!

Tasks

Most calendaring applications include a task component so you can track meeting preparation, project deadlines, and task breakdowns all from one application. Most calendaring applications allow you to set alarms or reminders. For example, you could set an alarm for 15 minutes before an important meeting to remind you to get to the meeting on time.

Rather than using sticky notes to track the hundreds of little things you need to do each day, use the task feature with your e-calendar to organize your routine. Using the task feature can help you be more effective and efficient in your productivity.

The task feature can also be used with non-recurring tasks and big projects. Tasks can be broken down into workable pieces, due dates, and prioritized. Similar to the calendar function, if others in your organization are using the same task application you can assign, share, or send tasks to each other. Big projects which are broken into smaller pieces and delegated to different employees can all be tracked on using the Task feature including updating the status of a task, due date, and indicating when a task is complete.

Just as you can set a recurring meeting with a calendar appointment, you can set a recurring task. For example, if the accounting report is due every Friday, you can set one task with a recurring due date. Most calendar and task applications are one product so you can see the calendar and task list side by side.

W04 Activity: Tracking Tasks

Scenario
You have multiple tasks to accomplish at work. You need to have effective time management to get them all done on time.

Instructions
NOTE: If you choose to use Microsoft Outlook for your calendar here are two tutorials: Basic Tasks in Outlook tutorial and What's new in Outlook 2019 tutorial. Microsoft also has a Create tasks and a to-do list tutorial. If you choose any other calendaring program (such as Google Calendar) make sure you can save a PDF copy to upload as your assignment for grading.

1. **Add** the following 12 tasks (to-do list) in your task system:

    a. Send copies of the combined sales reports for the week to the four regional managers.

b. Email the vice president of marketing and ask him to meet with an out-of-town supplier who had a meeting scheduled for Wednesday at 10 a.m. with Mrs. Maxwell before she knew she would be unavailable.
c. Transcribe the dictated letters: the one to Stacy Berger must be mailed today; the letters to Robert Burns and Joshua Cromwell can be mailed tomorrow.
d. Make a daily log of all incoming mail. Hold all mail for Mrs. Maxwell; however, contact her if something is urgent.
e. Send an email to Jennifer Evans to accept an invitation for Mrs. Maxwell to co-present at an upcoming conference with her.
f. Type the last two pages of the speech Mrs. Maxwell gave to the local board and send a copy to Seth Snelling to include in the company newsletter.
g. Email the vice president of sales and remind him your manager will be out of town and that he agreed to attend the sales committee meeting on Wednesday at 10 a.m.
h. Make copies of an article on time management and distribute them to the four vice presidents.
i. Email the Seaside Restaurant to schedule a lunch meeting for next Wednesday for the sales committee meeting to plan the quarterly sales seminar.
j. A six-page report prepared by Don Buckland has to be proofed and formatted in its final form by Wednesday afternoon.
k. A revised twelve-page report. She needs to receive the completed final report on Friday to review it before she presents it next Monday
l. Check with Delta Airlines to verify Mrs. Maxwell's return flight on Friday.

2. **Hint:** Some tasks may need to be spread over several days.
3. **Take** a screenshot of your Microsoft Outlook task list or another online task list.
4. **Save** as a PDF.

NOTE:

If you choose to use Microsoft Outlook for your calendar here are two tutorials: Basic Tasks in Outlook tutorial and What's new in Outlook 2019 tutorial. Microsoft also has a Create tasks and a to-do list tutorial.

If you choose any other calendaring program or task list (such as Google Calendar) make sure you can save a PDF copy to upload as your assignment for grading.

Review the rubric to ensure you have met all the required criteria.

Submit: Return to Canvas and submit your Task List in the W04 Activity: Tracking Tasks

Multitasking: The ability to multitask is a myth. Less than 3% of the world's population can multitask. When people think they are multitasking, what they are actually doing is quick task switching. It is recommended as part of time management strategies to minimize time switching tasks. One example is not checking email every hour. Limit checking email to less than four times a day, unless assigned otherwise by a supervisor.

Mobile computing: If you have access to an electronic tablet or smartphone, you can check email and calendar while away from your desk. This also means people have a way to reach you outside of business hours. How you handle requests outside of work hours is something you and your employer should discuss immediately.

Keyboard shortcuts: There are many keyboard shortcuts to help you save time. Functions such as print (CTRL+P) or find (CTRL+F) work in almost every software and application. If you go to support.office.com, and in the search bar (search is usually designated with a magnifying glass icon) type *keyboard shortcuts,* you will get a list of over 100 shortcuts that work in most software applications. For a Mac, you can generally replace CTRL with CMD and the same letter and get the same functionality.

Chapter/Week 05 Meeting Management

Meetings

"Now when king Lamoni heard that Ammon was preparing his horses and his chariots he was more astonished, because of the faithfulness of Ammon, saying: Surely there has not been any servant among all my servants that has been so faithful as this man; for even he doth remember all my commandments to execute them" (Alma 18:10).

Case Study
Tapiwa has used his administrative assistant skills in a variety of positions. Here is his story (organization name was replaced with X for privacy).
I volunteered for an organization called X and my tasks included helping the director to schedule meetings and communicate to the students and parents ahead of time. I was in charge of setting up computers for video communication between Zimbabwean students and their peer sponsors across the globe. I prepared spreadsheets to prepare financial statements which I reviewed with the director. Under the direction of my Stake President, I served as a Stake Executive Secretary. A calling which involved preparing agendas for the stake presidency meetings, kept minutes of all meetings in the absence of the stake clerk, conveyed communication from various arms of the church to different church leaders upon the stake president's ratification. In some instances, I was assigned to train other secretaries within the stake. I also used church software to communicate with other people and schedule their temple recommend interviews with the stake president. I liked that I could use so many of the same skills to benefit my Stake as well as my volunteer organization.

Meetings are a regular part of business life and require planning, coordination, and documentation. An administrative assistant may be responsible for the agenda, meeting notice, inviting people to the meetings, recording the meetings, scheduling the meeting, arranging for technology, and sometimes even arranging snacks or meals to accompany the meeting. Some meetings are scheduled with weeks or even months notice but other meetings may occur with less than 10 minutes notice. Even if a meeting occurs repeatedly, for example, every Tuesday at 10, all of the items listed above need to be addressed.

Optional Reading: The following article has good points on the importance of Agendas

- [The Importance of Having an Agenda Before a Business Meeting]()

W05 Activity: Find an Agendized Meeting
Scenario You need to prepare an agenda and take minutes for multiple meetings at work.
Instructions

1. Find an agendized meeting to attend:
    1. An agendized meeting is a meeting with a prepared agenda.
        i. In the [Agenda]() section of this handbook are four different samples of agendas.
    2. An agendized meeting could be a Ward Council, Presidency Meeting, City Council, Community Meeting or another meeting as long as it has a meeting agenda.
    3. The meeting can be in person or online.
    4. Collect a copy of the agenda, either in paper or digital form.
2. You have two weeks for this assignment to allow you to attend a meeting and complete the minutes.
 	
NOTE: For week five you will submit the meeting agenda and your minutes. Below are the instructions from W05 so you may prepare now to take notes during the meeting.
 	
1. During the meeting, take notes.
2. After the meeting, use your notes to create meeting minutes.
3. You will submit your notes and your minutes.
4. Details about creating minutes are in Chapter 5 of your handbook.

Submit: Return to Canvas and submit the name of the meeting you will attend and when and where the meeting will be held in the W05 Activity: Find an Agendized Meeting.

Scheduling Meetings

Scheduling is not as simple as looking at your employer's calendar and picking the first open time slot to set for the meeting. Some meeting rooms are on location, meaning in the same building as the employer's office, and other meeting rooms must be reserved in convention halls. Meetings generally require multiple people with varying schedules. The purpose of the meeting will help determine appropriate days, times, and locations.

The first thing to address in scheduling a meeting is availability of date, time, and location of the meeting. For example, in Phoenix, Arizona on the same weekend in March, NASCAR holds a race, and baseball has spring practice. This means nearly every hotel is booked. This weekend would not be a good time to book an annual stockholder meeting in Phoenix, AZ, whereas the last weekend in February would have a lot less traffic and therefore more conference meeting room space available.

It is wise to avoid early Monday morning meetings and also avoid late Friday afternoon meetings. If you are going to schedule a meeting during lunch, you might want to consider providing lunch or telling the invitees they may bring their lunch. Most businesses will have rooms on site to use for meetings, but the rooms must be scheduled in advance so two different groups don't try to use the same room at the same time. An administrative assistant may be in charge of a room and allow others to schedule the room. Electronic tools such as Google Calendar or Microsoft Outlook allow you to create a calendar just for a room. This makes tracking scheduling of the room much simpler and allows you to send a calendar invite to the attendees through the same calendar system. Knowing what technology is available in each room may also help with scheduling. For example, if you have two rooms (which seat 20 people each), one with a large screen to display or use for virtual meetings, and one without, and you have one group who will be inviting people to virtually attend the meeting and another group who will not, you want to make sure the virtual meeting gets the room with the technology.

See other common problems with scheduling meetings and one possible solution for each:

1. The meeting is scheduled and the invites sent and then you realize you didn't book the location. *Confirm the location before sending meeting invites.*
2. The meeting is scheduled and calendar invites are sent and then you realize key players can not attend the schedule date and time. *Check with the key players first for their availability before scheduling a meeting and sending invites.*
3. The meeting is scheduled and invites are sent and then the meeting location changes. *Using calendar invites allows you to change the location on everyone's calendar.*
4. Revisions to the meeting date, time, and location are sent out leading to confusion. *Don't change any facet of the meeting unless it is an emergency.*
5. The meeting is scheduled and invites are sent out but the attendees show up unprepared. *Include the agenda with the meeting invite so attendees can be prepared.*

Meeting Invitation

Those who need to be in attendance at the meeting need to be invited to the meeting. More formal meetings, such as the inauguration of a new company president, may require a formal, written invitation. For routine meetings, invite people via an electronic calendar such as Google Calendar or Microsoft Outlook. Regardless of the invitation type, all invitations need to include the meeting, date, time, location, and other pertinent details.

Case Study
Ardi worked for an investment management firm. Here is his story:
I worked in a large company with offices all across the state. We held all types of meetings, from small team meetings to medium regional meetings and large state-wide meetings. No matter how small or large the meeting is, there are similar principles in calling for them. When I first started my job, I received no training on how to do a notice of meetings. I made a ton of mistakes. Based on not sending an agenda one time, I had a meeting fail to take place. My office personnel were there, but the rest of the region was not. Let me tell you, I felt horrible, and I vowed to have a process for sending out meeting agendas. I made a recurring calendar reminder to tell me when to start working on an agenda. I also made a checklist to make sure I included all the needed items and sent it to everyone that needed to get it.

Meeting Agenda

The agenda tells the invitees what will be discussed during the meeting and is useful for keeping the meeting on task.

Minimum agenda items to include are as follows:

- Meeting start and end times
- Meeting location
- Discussion topics and time for each topic
- Which meeting participants will facilitate parts of the meeting

Microsoft Word has a sample agenda template you may want to use or your company may already have a template to use.

The important of a meeting agenda	
Creating and distributing an agenda that outlines the topics to be discussed before a meeting can have several important benefits.	
Give the meeting direction. Business meetings without an agenda are likely to have less direction and be less productive than a meeting with an agenda. Meeting participants become disengaged if	**Help attendees prepare.** If participants know which specific topics are going to be discussed at a meeting, participants can either research those topics in advance, or can prepare relevant information

meetings straty from relevant topics and may decide to skip future meetings. **The agenda is a preset list of discussion topics.**	and questions. **Agendas allow all participants to contribute constructively to the meeting.**
Opportunities for feedback. Creating an agenda for a business meeting enables participants to give meeting planner feedback about the direction or other considerations. **There maybe topics or special concerns that participants desire to have addressed in the meeting.**	**Aids the meeting momentum.** It is up to the leader of the meeting to keep discussions focused on relevant topics. An agenda can include a timeline so the meeting doesn't wander or go over the allotted time. **Agendas also allow multiple presenters to gauge thier presentation time.**
Decisions made in business meetings can ultimately determine the success or failur of a company, so meetings need to be focused and productive.	

Sample Agenda for a **formal** board meeting:

REGULAR MEETING OF THE
GOVERNING BOARD
WEDNESDAY, JANUARY 4, 2023

Notice is hereby given to the members of the GOVERNING BOARD and to the general public that the Governing Board will hold a Regular Meeting, open to the public, on Wednesday, January 4, 2022, at 6:00 p.m. at the Auditorium located at 6440 S 7th Street, Rexburg, Idaho. Members may participate in the meeting in person or by electronic means. The Governing Board may vote to enter into Executive Session, which will not be open to the public to receive legal advice from its attorney concerning items on this agenda. If anyone has a disability that requires special accommodation, please call the Board Secretary at (555) 555-1234 at least 24 hours prior to the scheduled time. The Governing Board may consider any item on this agenda in any order and at any time during the meeting.

The agenda for the meeting is as follows:

I. OPENING ITEMS

- A. Call to Order
- B. Pledge of Allegiance
- C. Reorder Agenda
- D. Adopt Agenda

II. REPORTS

- A. CEO Summary of current issues:
- B. Governing Board Summary of current issues:
- C. Written Reports:
  1. Division head
  2. Human Resources

III. CALL TO THE PUBLIC

Visitors are provided time to make statements to the Board. Those wishing to do so please complete a “Request to address the Board” form and return it to the Board President. Statements should be limited to no more than 5 minutes. Please keep in mind that the Board cannot take action on comments, questions, or concerns at this time.

IV. CONSENT AGENDA

Note: All or individual items may be pulled from the consent agenda and discussed individually.

- A. Approve Minutes: December 10, 2022
- B. Approve Financial Reports:
  1. Expenditure Report
  2. Profit & Loss Report

V. ACTION ITEMS

Discussion and consideration to:

- A. Adoption of policy BCB- Board member conflict of interest, BDB- Board Officers,

VI. ADJOURNMENT

Sample Agenda for a BYU-Idaho **department** meeting.

BYU-Idaho Online Curriculum Development Meeting Tuesdays at 10:15 a.m. to 11:15 a.m. LAM 206 *(this is the building name and room number)* Agenda		
Time	**Facilitator**	**Topic**
10:15 AM	Peter	Welcome
10:20 AM	Elizabeth	Prayer
10:25 AM	Adam	Spiritual Thought
10:30 AM	Simon	Leadership
10:40 AM	Martha	Copyright Presentation and Training
11:00 AM	Nathan & Mary	Q&A
11:15 AM	Peter	Adjourn

Sample Agenda for a **staff** or department meeting:

HR Team Meeting Agenda

Date: Jan 22 Time: 9:00 am Location: Conference Room A

Topic 1: Icebreaker

1. Match the favorite vacation spot with the employee.

Topic 2: Personnel Updates

1. Tom C is retiring.
2. Jung H is starting in the procurement department.
3. Char V is taking a leave of absence for 3 months-her work will be divided across the others in her department.

Topic 3: Legal Updates

1. New rules for work eligibility
2. Required documents

Notes and Action Items____

Sample Agenda for a **ward council**:

Samoa 2nd Ward Council
Sundays ~ 10:15 a.m. to 11:15 a.m.
Bishop's Office

10:15 am	Bishop - Welcome
	Relief Society - Opening Prayer
	Elders Quorum - Spiritual Thought
	Primary - Handbook Training
	Primary - Report and upcoming activities
	Young Men/Young Women - Report and upcoming activities
	Relief Society - Report and upcoming activities
	Elders Quorum - Report and upcoming activities
	Other Concerns -
11:15 am	Young Men/Young Women - Closing Prayer

Case Study

Lin was taking over the secretary duties for a local government agency she asked for training on how to prepare to take minutes at her first meeting. This is what the current administrative assistant told her:

The first thing you need to do is create your agenda. After you have the agenda, create a minutes template. Add spaces between each line on the agenda to take notes in, this will help you follow along with the meeting without having to rewrite each item on the agenda.

If your agenda has items that will be voted on, add a place to capture the votes. I like to list all the government member's names so I can just circle who made the motion and who seconded the motion as well as everyone who voted. This way I don't have to write or keep track of people's names and can take extra time capturing the wording of the motion.

Be thoughtful of writing down the important parts of what is said but don't feel like you have to capture the discussions word for word.

Have a spot to track any action items that need to be followed up on so they don't get lost. If a government member wants to have a report from a department, or wants to recognize an employee for great work you do not want to forget to take care of those things.

Meeting Minutes

Most meeting discussions will need to be documented. Generally, documentation can be done digitally (by voice recording) or in writing (by taking notes). The formal word for meeting notes is Meeting Minutes. Meeting Minutes has nothing to do with time (minutes). The word minute is Latin in origin from *minuta scriptura* meaning small notes. Therefore, writing meeting minutes is a way to document the most important parts of a meeting. Similar to taking notes in class. You do not write down word for word what the instructor says, you just take notes on important parts of the lecture.

Meeting Minutes should include important details from the meeting, what was discussed, any decisions made, reports or presentations given, proposed actions, future events, and future meeting topics. The Meeting Minutes allow attendees to review for assigned actions and review important details and allow those unable to attend to know what took place during the meeting.

Some meetings are more formal than others and will use Robert's Rules of Order. It might be useful to become familiar with these rules. The most important thing to note when using Robert's Rules of Order, is that you **must** record who proposed a motion, who seconded the motion, the conversation after the motion, who called for the motion to be approved, and the vote including all for yea, nay, and abstention.

If you are recording a corporate meeting, read all pertinent information **before** the meeting so you are familiar with the context of the meeting. This will allow you to understand the meeting, and take appropriate minutes without asking a lot of questions. Sit as close to the chairperson as possible so as to hear every word. Most likely, a roll call will be held to determine the attendees versus the absentees. The more familiar you are with the group, the less time it will take you to record this information.

Using the agenda can help guide writing minutes. Below is a sample of minutes (for a simple department meeting) based on the agenda above.

BYU-Idaho Online Curriculum Development Meeting
Tuesdays at 10:15 a.m. to 11:15 a.m.
LAM 206 *(this is the building name and room number)*
Minutes

Attendees: Adam, Cindy, Jennifer, Peter B, Peter W, Sean, Selena
Guests: Ina
Absent: Matt, Michael

10:15 a.m.—Peter W—Welcome
    Shared recent email from Eric related to Spring 2020 semester changes.
10:20 a.m.—Jennifer—Prayer
10:25 a.m.—Adam—Spiritual Thought
    "For I have given you an example that ye should do as I have done unto you." -John 13:15 and "Therefore strengthen your brethren . . . in all your doings" (DC 108:7).
10:30 a.m.—Sean—Leadership
    Power Of Moments by Chip Heath and Dan Heath.

Ask yourself:

What must I start doing to build the capabilities of myself and others?

What must I stop doing?

10:40 a.m.—Ina—Copyright Presentation and Training

Presentation slides attached for reference

1. Annual Academic License (CCC)—purchased by BYUI and good for one year, Harvard Business Review is one example
2. Teach Act—allows additional access beyond fair use for academic purpose
3. Creative Commons—material owners have made available to the general public, OER for textbooks and pexels.com for pictures are two examples
4. Fair Use—must complete the form found online
5. Hyperlink Only—if you are linking directly to the source such as Jeffrey R. Holland's BYU address on Cast Not Away Therefore Your Confidence the link is sufficient. You may not legally download the address and post in your course as a PDF.
6. Library License—purchased by BYUI. One example are the books you may check out of the campus library or read online.
7. License—You can not use copyrighted or trademarked material in your class. Examples include Disney, McDonald's, and Nike.
8. Public Domain—all the creative work to which no exclusive intellectual property rights apply. Those rights may have expired, been forfeited, expressly waived, or may be inapplicable. For example John Sebastian Bach's work from the 1600's now belongs to the public domain.
9. Used with permission—you need written permission from the owner and an email is sufficient.

11:00 a.m.—Q&A

- Selena asked how to know what a particular work falls under. Ina answered to send as much detail to her (author, publisher, date, title) and she will get us the answer.
- Cindy asked where these nine items and the definitions are located for reference. Ina answered she will share her slides.

11:10 a.m.—Assignments

1. Ina will share slides with administrative assistants to send with the minutes.
2. Peter W will forward Eric's email to the group.
3. Administrative Assistant will email minutes and slides to all group members.

11:15 a.m.—Adjourn

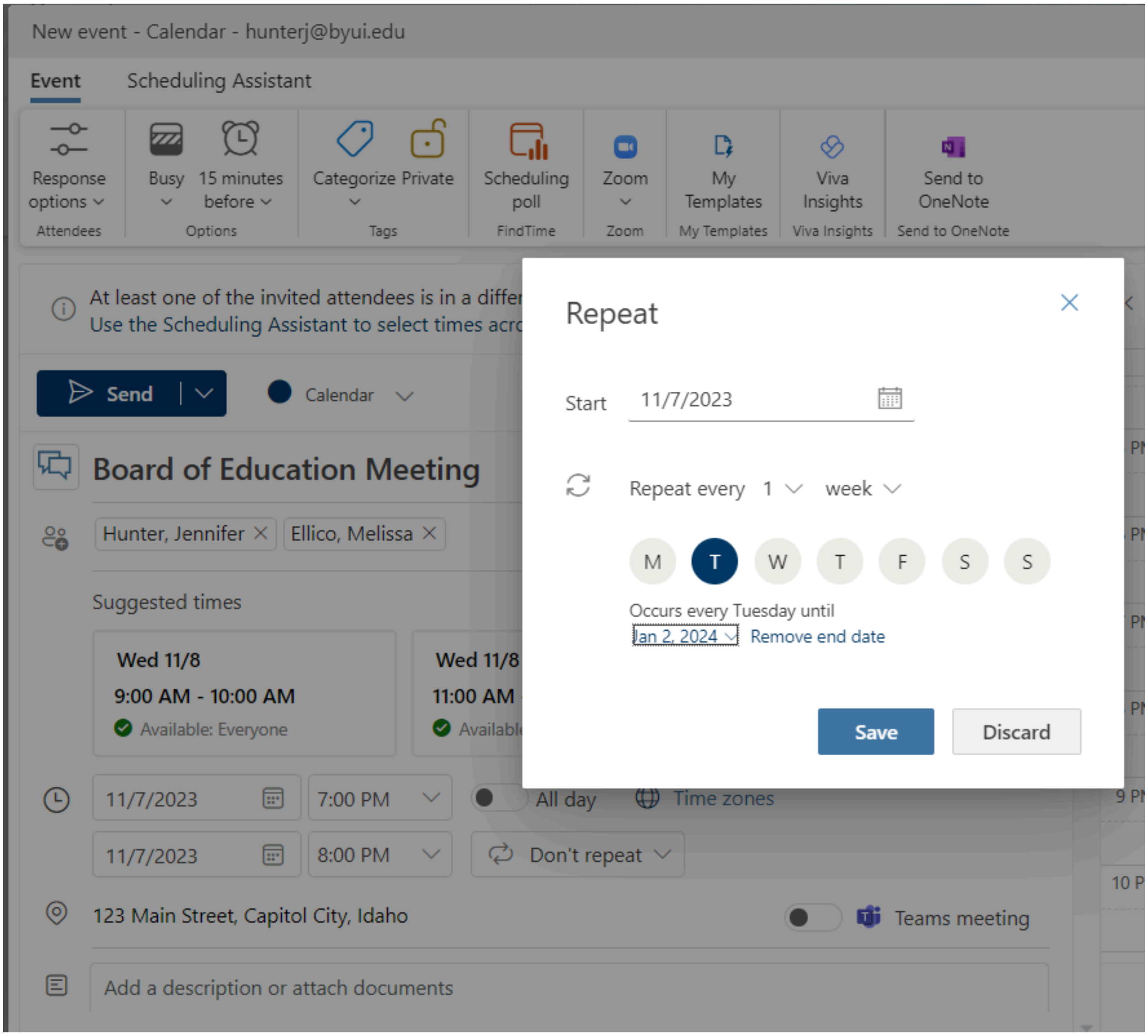
Meeting Length

If your meeting lasts longer than 45 minutes, you will need to plan on a break halfway through so the attendees can stretch their legs. If the meeting lasts longer than ninety minutes, you will need to schedule a longer break halfway through to allow the attendees a bathroom break. If your meeting lasts longer than two hours, you might want to have water available to attendees. If you are meeting for over two hours you may want to have snacks available after the first hour. If you are scheduling a meeting from 8:00 a.m. until 5:00 p.m., you will either want to serve lunch to the attendees or allow a sufficient enough break time to allow everyone to get food and to eat.

W05 Activity: Meeting Preparation
Scenario In today's very busy world, calendars fill up fast. When you need to have a meeting that includes multiple people, it is important to get on peoples' calendars early. The notice of a meeting is a great way to do this. It allows you to block out time without having all the agenda details pulled together yet. Additionally, in some formal business situations, a notice of meeting is a legal requirement.
Instructions

1. **Create** a digital meeting invite for a Board of Education meeting. The details to use are:
    1. The first Tuesday of every month at 7:00 p.m. (mountain time) the Board meets.
    2. The invite is for the rest of the year (for the meeting date and time listed above.)
    3. The meeting will be held at the Main Auditorium located at 123 Main Street in Capital City, Idaho.
    4. The Board will be approving a new Business Education Curriculum.
2. Do NOT actually send the invite, we don't want a bunch of fake calendar appointments on anyone's schedule.
    5. Invite firstname@gmail.com and lastname@gmail.com to the recurring meetings.
3. **Take** a picture showing the setup for a recurring meeting. The image below shows a recurring meeting setup in Outlook.
4. **Create** an agenda for the above meeting. Review the agenda portion of the Handbook if needed (chapter 5).
    a. The picture (step 3 above) needs to be posted on the bottom of the agenda (just for grading purposes).

Review the rubric to ensure you have met the requirements of the assignment. **Submit:** Return to Canvas and submit your Meeting Agenda (with the Meeting Invitation image at the bottom) in the W05 Activity: Meeting Preparation



Technology

Some meetings may need technology and some may not. Examples of technology include a laptop on which to take meeting minutes, a computer to access Zoom to allow remote access for virtual attendees, a conference or speaker phone so multiple people may be on the same call, an overhead projector to share accounting information, a large screen TV to project a presentation, or a microphone if the room is large and people at the back need to hear.

Web Conferencing

A web conference is a popular way to hold a meeting when attendees live and work in various locations across the globe. Web conferences can be for company announcements, marketing meetings, new employee orientations, presentations, training sessions, and even some shareholder meetings. Meeting via the web is much cheaper than paying for travel expenses for each attendee.

Videoconferencing technology allows two or more people at different locations to simultaneously see and hear one another as well as exchange documents, share data on computer displays, and use electronic whiteboards. Systems such as Skype are simple and inexpensive, requiring only a Webcam and some free software. However, there are also large, dedicated systems that require extensive electronics, including cameras, servers, and a fiber-optic network or high-speed telephone lines. Web conferencing software is available from various vendors such as gotomeeting.com and zoom.com. Web conferencing technology will have various tools available to use during the meeting such as annotation tools, break out rooms, chat, polls, recording options, screen sharing, whiteboards, and more. You may use all of the tools or you may use only some tools depending on the context of the meeting. Web conferencing tools will also include an option to secure the meeting using registration or passwords. This keeps unwanted people out of your meetings.

Setting up a web-conference meeting will include many of the same details as a face to face meeting.Your email invitation to join a web conference may need to include instructions on how to access the web conference, especially if software has to be downloaded first. You should always join the web conference 10–15 minutes early to help with anyone experiencing access problems. As the administrative assistant, your role could be interacting with the web conference software, monitoring the chat, and troubleshooting any technical difficulties so the presenter can focus on the presentation. These tasks do not supersede your responsibility to take minutes for the meeting. A nice advantage to web conference software is the ability to record the meeting. You may need the recording to take minutes after the meeting or you may email the recording out to participants who could not attend. If the meeting is scheduled for more than 90 minutes, you will need to build break times into the agenda for the attendees.

W05 Activity: Meeting Minutes

Instructions

1. **Attend a meeting:**
    a. You will need to attend an agendized meeting. This could be a Ward Council, Presidency Meeting, City Council, Community Meeting, or another meeting as long as it has an agenda. The meeting can be in person or online.

b. Collect a copy of the agenda, either in paper or digital form.
    i. Please use fake names for this assignment, for example, if the agenda is in paper form
        1. You may black out the names before taking a photo and upload the image
        2. You may retype the agenda changing the names
2. **Prepare meeting minutes:**
    a. During the meeting, take notes.
    b. After the meeting, use your meeting notes to create meeting minutes.
    c. Please use fake names for this assignment, in place of real names, to protect the privacy of businesses and individuals when necessary.

Review the rubric to ensure you have met the requirements of the assignment.

Submit: Return to Canvas and submit your meeting agenda and meeting minutes in the W05 Activity: Meeting Minutes

Chapter/Week 06 Professional Development

Professional Development

“If today you are a little bit better than you were yesterday, then that’s enough. And, if tomorrow you are a little bit better than you were today, then that’s enough” (Elder David A. Bednar, Act in the Doctrine: Spiritual Patterns for Turning From Self to the Savior).

Developing a S.M.A.R.T. Career Path	
In recent years, many have become familiar with SMART goals. We can use the same principles to develop a SMART career path.	
Specific	Rather than a generic goal like “I will learn Excel” be more specific. For example, “I will complete two Excel courses.”
Measurable	It is hard to measure “more” (“I will learn more word processing skills”). Instead, write something measurable such as “I will learn 10 additional word processing skills.”
Attainable	Stretch yourself a little (not a lot). If you are just starting a new position, a long term goal could be “I will be the CEO” however, a more reasonable short term goal, that is attainable, within a year, could be “I will earn a promotion.”
Relevant	Choose a path that matches your career expectations. For example, for an administrative assistant, an office job is more relevant than a cooking job.
Timely	Set time-lines as you climb upward in your career path. A goal without a timeline is just a wish with little motivation. For example, “In less than one year I will earn my first certificate.”
As you complete small and large goals, celebrate your accomplishments. You are moving forward. With each success you are closer to your chosen career. 🎉	

Individual Career Development Plan

Goals *To be achieved*	**Skills or Competencies** *To be learned or acquired*	**Resources** *What is needed (money, time, etc.)*	**Activities** *Possible learning opportunitie s to try*	**Status** *Results*
Short-range *Critical within present position (I Year)*				
Mid-range *Important for growth within present position (2 Years)*				
Long-range *Helpful for achieving career goals (3-5 Years)*				

Case Study
Amara worked at a consulting company. Here is her story:
I worked with a company for a year and knew there would be a position to advance to coming up soon but my current skills weren't good enough to apply for the job. I knew, as a low-level administrator, the company would not pay for a professional development conference or travel. A friend suggested taking a course from a local college so I asked my boss. He said I could take the course but I would have to pay for it, but the company would reimburse me 75% when I passed successfully. They also allowed me 3 hours per week to study on company time. I passed the course and have since taken 3 additional courses. Other colleagues are taking courses too. The company is instilling faith in us by giving us the opportunity to increase our skills and we in turn have higher loyalty and increased skills to do better work for the company. The company allows all employees 3 hours per week now of professional development time which can include reading self-help books such as 7 Habits for Highly Effective People by Steven Covey.

Optional Reading: Soar Like An Eagle.

Expanding your responsibilities

In a large company, you may have a very specific defined set of responsibilities. One way to prove your value to the company is to extend the depth to which you perform your abilities. For example, if you are responsible for tracking automobile expenses, and current records are all in paper form, you could automate the system by putting expenses tracking forms in the cloud. In a small company, you may have many different responsibilities. One way to prove your value to the company is to extend the breadth of responsibilities. For another example, if you were responsible for making travel arrangements, perhaps now you can gather the financial records for the travel and put them in order for the accounting office.

Regardless if you work for a large or small company, find out as much about the company as possible. Discover how the company is managed, find out how to market to new customers, learn how products and services are produced. You can also learn more about being an administrative assistant by taking free online courses from companies such as coursera.org. You can earn certificates from companies such as Microsoft to further demonstrate your potential. Life-long learning benefits your personal development and self-sustainability, but also increases active citizenship and social inclusion.

Don’t wait for someone to give you something to do. If you finish your responsibilities early, ask for more job duties. Show your employer you care about their company and they should value you more as an employee. Just as you can increase your knowledge, you can increase your skills. If you type 55 words per minute now, practice until you can type 65 words per minute, and then practice until you can type 75 words per minute. Instead of knowing just the basics of Microsoft Word, learn advanced tools and features. Whatever your responsibilities are, filing, sorting mail, answering phones, learn how you can improve. The International Association of Administrative Professionals offers a couple of different certificates you can earn to prove the level of quality of your skills.

With the fast paced nature of technology in the 21st century, many managers are doing work on personal computers once handled by secretaries decreasing the need for secretaries but increasing the need for other positions such as administrative assistants and information specialists. It is up to you to keep your knowledge, skills, and abilities current with what managers are looking for. It is up to you to demonstrate your value to the company. Improving current skills and gaining new skills isn’t a guarantee for job security but it is definitely a step in the right direction.

As you move up in the ranks and start to supervise other employees, don’t stop learning and progressing.
Five key points to strong leadership are when your employees:

1. Trust you and know that you are looking out for the good of all.
2. Share in your vision and want to achieve the same goals
3. Know that you will do your all to help them succeed
4. Are confident in your decisions
5. Know that you have everything under control and that the future looks bright.

Lead by example in every way. The way you act, how you talk, the way you dress, your optimistic view, your positive approach, what you say about others, and how well you control yourself, all pertain to how you are viewed as a leader.

When in doubt, utilize key members of your staff to come up with the right solution. Many times, listening more than talking will get you further and you will also be seen as a leader with quiet confidence.

W06 Activity: Professional Development Business Memo

Background

Often, within an organization, you need to search out your own learning opportunities to strengthen a current weakness. This is called professional development. You do not want to try to ignore your weaknesses and hope that no one notices. It is best to be proactive about improving yourself. Elder Bednar calls this being an agent.
Instructions
1. **Search** the internet for at least three courses, workshops, training sessions, or seminars to improve your professional development. a. Try searching for "office relationship seminar" or similar terms for applicable results. b. It doesn't matter if the workshop costs money, you will neither register nor attend. You are just looking for viable professional development. 2. **Document** the following as you identify training opportunities you are interested in attending: a. Name of the training b. URL of the training opportunity website (if applicable) c. Focus of the training d. Pros and cons of what the training has to offer e. Cost of attending (some conferences are free) f. Location of training (location can be online) 3. **Choose** the top two training opportunities you are interested in attending. 4. **Write a memo** to your supervisor (instructor), in MS Word, describing the top two training opportunities you found, and request permission to attend one of the workshops or training sessions.
Review the rubric to ensure you have met the requirements of the assignment. **Submit:** Return to Canvas and submit your MS Word Memo in the W06 Activity: Professional Development Business Memo.

Networking

Networking is connecting with others, it is exchanging information, it is communicating with others for mutual benefit. Build your network by talking with others. Whenever you attend a professional development training, conference, or meeting, don't sit in the back of a room and ignore others. Instead, find ways to interact with others. You will learn from them, have people to ask questions of, and have a more enjoyable time. The support of peer professionals is worth the effort and the ability to connect with like professionals will be very beneficial.

Job Application

Case Study
Luciana is in her last semester of coursework before graduating with a bachelor's degree in public administration. Here is her story:
I decided to begin my job search so I would be ready for a position after graduation. I wanted to make sure I was aware of what is out there in the real world. I realized even though there are quite a few job advertising openings, I didn't want to take the first offer I might get. I know from my college jobs it is just as important to find the right job for me as it is to be the right applicant for the job. I learned in my coursework the importance of researching companies' mission statements, code of ethics, and any employee reviews that exist. I began looking at these different published resources for companies and determining if I would want to work for them. I made a list of things important to me. By doing this work before actually needing to apply for jobs, I hope I can make sure I apply for companies I would actually want to work for.

Looking for a New Job
When you need to start looking for a new job, start looking at available job postings to see what skills are in demand. If you have the right skills, make sure they are listed on your résumé. According to careershifters.org, only 30% of all new jobs are advertised. Don’t just look at job ads to apply for a new position, talk to coworkers, family, neighbors, even your insurance agent and ask if they know of any available positions. Register with job sites such as monster.com and networking sites such as linkedin.com. Temporary service agencies can help you locate a temporary job while you're searching for a permanent job. Treat the temporary job as if it is a real job and give it your best. Some employers use temporary agencies to try out new employees and then hire the one they like into a full time position. Treat a temporary job as a job interview.

Networking
Networking is connecting with others, it is exchanging information, it is communicating with others for mutual benefit. Build your network by talking with others. Talk to people in businesses that you interact with. Show a pleasant personality, and be ready to speak about past projects and skills. Employment opportunities may or may not come from these contacts, but the support of peer professionals is worth the effort.

Résumés

When sending out résumés, keep the résumé to one page and ensure it looks professional. Carefully proofread and correct any errors. You may be competing against hundreds of others for the same position, so make sure your résumé stands out.

Résumés should always include the following:

- The following contact information:
    - Full name
    - Email address
    - Phone number
    - Address
- Use the following as your headings:
    - Work experience (entrepreneurial work would go here)
    - Education
    - Skills
    - Activities

When listing your skills, include any skills from the job posting you possess. If the company took the time to list a skill, it is a safe bet this is a skill they are looking for. Many times, machines now read résumés as a way to filter applicants and if you don't list necessary skills your résumé won't make the first round of cuts. Be honest. If you do not have the skill, don't list it. However, if you can take a quick class and learn the skill then indicate such on your résumé. For example: Quattro Pro Class.

W06 Activity: Job Search Report

Instructions

1. **Search** the internet for available office positions. Tip: Search sites such as [Monster.com]() and [Indeed.com]().
2. **Identify** at least three positions you will be qualified for after you have completed your certificate or degree.
3. **Write** a one-page report to your instructor with three paragraphs and include
    a. What you learned from the job postings
    b. What skills you need to gain to apply for the job postings
    c. What your academic plan is to achieve your career plan
4. You are **not** expected to post the job ad.

Review the rubric to ensure you have met the requirements of the assignment.

Submit: Return to Canvas and submit your one-page report in the W06 Activity: Job

Search Report

Cover Letter
Always include a cover letter with your résumé. If you were handing your résumé to someone in person, you wouldn't just hand them your résumé, you would shake their hand and introduce yourself. Your cover letter is your handshake when applying online or through the mail.

When your résumé lands you an interview, prepare for the interview. Consider your image. Are you dressed professionally? Is your hair combed and are your teeth brushed? Can you look someone in the eye while talking to them? You can write up practice interview questions and then ask a friend to hold a mock interview with you so you can practice. Practice may help build your confidence so you seem more assured during your interview.

Most interviewers will ask you if you have any questions. Have a question prepared to ask. This shows your genuine interest in the company. You could ask about their philanthropic endeavors. You could ask for a clarification in the job posting.

Chapter/Week 07 Conclusion

W07 Survey: Hard Skills

1. Complete Column W07 in the Hard Skills Survey in Appendix D .
2. Return to Canvas and take the W07 Survey: Hard Skills

W07 Survey: Soft Skills

3. Complete Column W07 in the Soft Skills Survey in Appendix D.
4. Return to Canvas and take the W07 Survey: Soft Skills

Now that you have self-evaluated what skills you currently possess, now you can add these skills to your resume and discuss the skills in a future job interview.

Appendix A - Event Planning

As an office professional, you may be responsible for arranging a wide variety of meetings, from small informal meetings to large conferences.

The following section is optional and included for future reference only.

Event Planning

Hint: Do not try to plan an event alone. Form a committee. If there is part of the event that is not your strong suit, whether it be entertainment, technology, or food and drink, delegate it to a member of your team who loves that part.

Formal Meetings

The best way to tackle meeting planning is to create an action list. You will customize the list depending on the meeting. The following are some basics:

1. Find a common date and time when key members can attend.
2. Reserve the meeting room.
3. Make and confirm hotel and transportation accommodations for any out-of-town participants or provide options for participants to make their own reservations.
4. Get confirmation numbers or emails for all reservations.

5. Determine how the meeting will be announced.
6. Plan audiovisual or any other technology needs.
7. Prepare the agenda.
8. Confirm attendance at least 24 hours prior.
9. Confirm any food arrangements.
10. Prepare documents for distribution.

Sample Event Checklist for a face-to-face team building meeting:

BEFORE THE MEETING		
General	**Target Date**	**Completion Date**
Secure names/addresses		
Reserve meeting room(s)		
Make calendar notations		
Prepare meeting notice		
Prepare agenda		
Send notice/agenda		
Prepare list of materials, supplies, and equipment needed		
Order refreshments		
Prepare meeting evaluation forms		
Prepare handouts		
Make hotel reservations (if applicable)		
Confirm meeting room(s)		
Meeting Rooms		
Location of electrical outlets		
Extension cords		
Audiovisual equipment		
Audiovisual supplies		
Name tags/name cards		
Seating arrangements		
Arrange for water		
Arrange for paper and pens		
MEETING DAY		
Final check on meeting room(s)		
Final check on food		

Final check on equipment		
AFTER THE MEETING		
Prepare/distribute notes/minutes/summaries		
Prepare follow-up correspondence		
Summarize evaluation forms		

Conferences

Depending on the type of conference and your responsibilities, you will need to do the following:

1. Coordinate between the conference location and outside vendors for food, technology needed including audiovisual equipment, easels with large pads of paper and giant markers, lecterns and microphones, and overhead projects just to name a few. It never hurts to have extra extension cords.
2. Arrange registration and check-in along with name tags and conference packets.
3. Arrange name cards if you are going to have panel sessions. You will need name cards to place in front of each panel member so the audience knows who is speaking. Name cards will also help you if you are taking minutes to know who to attribute the various comments made.
4. Travel and parking may also be factors to consider.
5. Make arrangements for press coverage, security, or to obtain translation services for ADA or international attendees if needed.
6. Create conference packets or purchase awards if needed.
7. Supply local information such as tours, restaurants, hotels, and museums.
8. Plan menus and be aware of any dietary restrictions of conference attendees. You need to arrange the time and location for food as well as the clean up.

Additional items to consider when planning a conference:

- Booking the conference site (ensuring enough rooms and space)
- Booking a select number of rooms in hotel for conference attendees at discounted rate
- Confirming smoking and non-smoking locations
- Issuing call for proposal if soliciting presenters, sending invitations to speakers
- Publishing conference materials including schedule of presenters and vendors
- Scheduling beverage, catering, and other food amenities
- Scheduling supporting equipment such as tables and chairs, technology for each presentation room

During the conference: Your role may change to hostess, which could include checking meeting room set up and availability of materials, heating, cooling, and lighting of venue spaces, if refreshments are fresh or warm, verifying the working condition of audiovisual equipment along with regular hostess roles of greeting attendees. You will need all the information so you can ask any question that may come your way. Your role may extend to taking minutes in various meetings during the conference, providing accounting information, updating statistics (such as the number of attendees), or even coordinating with media representatives.

After the conference: You are still not done. Excess conference materials need to be removed from the meeting rooms as well as the conference venue (please recycle where possible). All equipment will need to be returned to its original owners including audio visual equipment and tables and chairs. If there are lost and found items, you need to determine a way to connect them to their owners. After the actual conference venue is taken care of, you may need to follow up with conference minutes, generate reports (especially to the accounting office for expenses incurred and revenue generated). You may have thank you letters to send out to guest speakers and vendors. If this conference is going to be an annual event, have a wrap-up meeting with your team to discuss what went well, what did not go well, and how you could improve next year. Take copious notes for yourself so the conference is even better next year.

As you can see from all of the above, a conference is not something a single person can put together. You will need to form a team and delegate responsibilities, and yet the final outcome may fall to you alone, so be diligent in following up on all assignments. Some people take entire classes dedicated to conference or event management to learn all the intricacies. Don't expect to be an expert after reading just two pages. If you are using a hotel or convention center, they most likely have experts on hand who have planned many conferences. Meet with them regularly and use their expertise; you can learn from them and add to your repertoire of knowledge, skills, and abilities.

Sample Event Checklist for a conference meeting:

BEFORE THE MEETING		
General	**Assigned to**	**Completion Date**
Post Registration (online or paper)		
Post Call for Presentations		
Invite Keynote Speaker		
Reserve meeting room(s)		
Make calendar notations		
Prepare Conference Invite		
Prepare schedule		
Notify accepted and denied presenters, obtain presenter equipment requests		

Prepare list of materials, supplies, and equipment needed		
Tally received registrations		
Order refreshments		
Prepare conference evaluation forms		
Prepare conference handouts		
Make hotel reservations (if applicable)		
Confirm meeting room(s)		
Plan after hour events		
Meeting Rooms		
Location of electrical outlets		
Extension cords		
Audiovisual equipment		
Audiovisual supplies		
Name tags/name cards		
Seating arrangements		
Arrange for water		
Arrange for paper and pens		
Pre-Conference		
Confirm all presenters arriving		
Confirm all presenter equipment requests		
Move materials to event center		
CONFERENCE DAY 1		
Before Conference		
Check meeting room(s)		
Check food order/delivery		
Check equipment		
Start checking in registered attendees		
Help Desk/Lost and Found		
CONFERENCE DAY 2		
Check meeting room(s)		
Check food order/delivery		
Check equipment		
Help Desk/Lost and Found		

END OF THE CONFERENCE		
Collect evaluation forms		
Give Thank you to Presenters		
Collect supplies		
Settle bill with event center		
AFTER THE CONFERENCE		
Prepare/distribute notes/minutes/summaries		
Prepare follow-up correspondence		
Summarize evaluation forms		
Wrap up meeting		

Appendix B –Travel

As an office professional, you may be responsible for planning for an executive's travel away from the home office, or for planning travel for others to come to the home office.

The following section is optional and included for future reference only.

Travel

"And again I say unto you, my friends, for from henceforth I shall call you friends, it is expedient that I give unto you this commandment, that ye become even as my friends in days when I was with them, traveling to preach the gospel in my power" (Doctrine and Covenants 84:77).

In the 21st century, the global market affects small and large companies. As such, your employer may buy or sell products outside the city where the business is located. This may necessitate travel to meet with buyers or sellers or to check on products or services. You may work for a large company with its own travel agency, however, it would still be wise to learn some travel procedures in your role as an administrative assistant.

Travel arrangements could include airfare, car rental, conference registration, hotel booking, and more. Cost is most likely a factor for most businesses, as is the speed of getting to the destination, however, a hassle-free trip is important. For example, a later non-stop flight is most likely preferred over a flight with multiple stops even if the multiple stop flight is faster and cheaper. The hassle of switching planes may not be worth the cheaper airfare. This is where the synergy with your employer will come in handy as you learn the travel preferences in order to make optimal travel arrangements.

- Optional Videos: The Executives—Travel Planning Woes video is a good reference for travel.
- Optional Article: The 8 Ways to Be Your Boss' Travel Superhero is a good reference for Travel.

Travel Itinerary

You don't plan travel without a destination and purpose in mind. An itinerary is a travel agenda from the time of departure until return. Unlike a meeting agenda, which usually spans only one hour, a travel agenda or itinerary spans a couple of days and needs specific details and time itemization. The itinerary is useful to both the employer and the administrative assistant. The employer uses the itinerary to know when and where to be at all times. The administrative assistant keeps a copy of the itinerary to answer questions for the employer such as the address or time of the next appointment and also to know the employer's location at all times in case of emergency.

You will need to collect multiple pieces of information from your employer to book the smoothest travel:

1. Purpose of the trip
2. Desired departure and return dates
3. Details (time and location of meetings)
4. Who is traveling (one person or many)
5. Preferred transportation (airplane or train, rental car or taxi)
6. Hotel accommodations (does your employer want a hotel with a pool, gym, or continental breakfast)

Create a rough draft of the itinerary to review with your employer. Once the employer approves all the details, you can begin to make travel reservations.

Reservations

The internet has made travel arrangements so much easier with companies such as Booking, Expedia, Kayak,Orbitz, Priceline and so many more. (We listed these five based on their longevity in the market, though we don't promote one company over another.)

Usually, book reservations for a trip in this order, as without the prior one, the next ones are not as relevant:

1. Conference
2. Airfare
3. Hotel
4. Taxi or car rental

Travel Reservations: Many of the reservations you will make will require payment or a deposit to hold the reservation. Credit cards are a common form of payment. Find out from the employer which credit card is preferred to use (the company credit card or a personal credit card). Then, you will need to get access to the card. Be sure to get confirmation emails and receipts for each payment or authorization to balance the credit card statement and to complete the travel authorization for the company. If the traveler will not have the credit card with them (for instance, if it is an executive's card) make sure to find out if additional authorization forms may be required.

Dinner Reservations: Your employer may have a number of meetings to attend at all hours of the day, including dinner. Dinner meetings usually require a reservation, so you will need to know the number attending the meeting and the preferred restaurant. Book the reservation under your employer's name. Get a confirmation number or email to ensure the proper time and place settings were correctly conveyed. No payment should be required up front to hold a dinner reservation.

International Travel: If the trip involves international travel, please make yourself aware of the conditions imposed on business versus tourist travelers to various countries. If the trip involves international travel, you will need to plan more time to make reservations to accommodate all the conditions.

Items to consider for international travel:

1. Many countries require a passport to enter or leave the country.
    a. Passports in the United States can take 6–8 weeks to process, so you need to plan ahead.
    b. Some countries also require a visa to enter.
2. Driver's licenses may or may not be recognized in visiting countries.
3. There may be required immunizations and vaccinations.
4. Maintain awareness of current global situations which may prohibit international travel.
    a. Political tensions between the countries may prevent travel from citizens of these two nations.
    b. In 2020, there was a Coronavirus pandemic which limited travel to and from your home country.
    c. Consider purchasing travel insurance to protect from changing circumstances.
5. International Currency. When using a credit card, the credit card company will make the currency exchange on the credit card statements. When using cash, most countries will accept United States currency, but you still need to be aware of the currency transfer rate. One dollar in one country will not equal one dollar in another country.
6. Report specific items purchased in the foreign country when going through Customs to determine if taxes are due. As of 2020, United State citizens could bring back up to $800 worth of merchandise as souvenirs. Warning: Do **not** understate the value of items. The items may be seized and you will still have to pay the tax.
7. Time Zones. UTC is the Greenwich Mean Time, and all other time zones are plus or minus hour(s) from this time.

Helpful websites for the United States:

1. The United States health and safety conditions: [US Department of Commerce].
2. To get a passport in the United States: [Travel State].
3. United States Department of Health and Human Services: the [CDC Website].
4. United States [Customs and Border Protection].
5. Time Zone help: [Time Difference Calculator].
6. Currency Exchange rate help: [Exchange Rates].

Airfare: Using services such as Expedia will allow you to book airfare, hotel, and car rental all at the same time. Before booking, find out if your employer is a member of any company, such as a Delta frequent flier member (airline), Hilton Honors Club (hotel), or Avis (car rental) member. This will help identify the employer's travel preferences and make reservations easier for you. Other travel preferences include if your employer likes first class, coach or exit row; window or aisle seat; checked baggage (and how many pieces) or carry-on luggage; which airport to use (if you have more than one option nearby); or multi-stop or nonstop flights.

Due to TSA and new travel restrictions, the name on the ticket must match the name on the government issued ID, so be sure you have the name exactly as it appears on the ID including a middle initial (if applicable). For international travel, a passport will also be needed. The name on the ticket must match the name on the passport, so make sure you see your employer's passport so you type the name exactly as it appears on the passport. You will need to find out if your employer prefers a printed ticket, electronic ticket, or digital ticket, and then make the correct selection when booking the airline reservation. Many digital tickets can now be accessed with a smartphone, and therefore, there is less paperwork the employer needs to handle.

Once you have determined your employer's airline, ticketing, and schedule preference (such as taking a red eye flight or arriving the day before the scheduled meetings), you can book the airline reservations. Get a confirmation number or confirmation email.

Hotel: If your employer is traveling for a conference, and the conference is held in a hotel, book the hotel room early to receive the conference discounted rate and to get a room in the same hotel as the conference. The discounted rooms will fill up quickly. The conference hotel is generally not the cheapest option, so if you cannot get a discounted rate, you may want to check out nearby hotels. Some hotels require you to pay at the time of registration and other hotels will let you pay when you arrive. Find out from the employer how they would like to pay for the room; generally, a credit card is the preferred method of payment. Be sure to find out the conditions of canceling the reservation. Some hotels require a minimum 24 hours notice in order to receive a refund. Most hotels will hold the room until 6:00 p.m., so if your employer arrives later than 6:00 p.m., confirm with the hotel they will hold the room until a later time. Regardless of where you book or when you pay, make sure you get a confirmation email.

Car Rental: Depending on your employer's transportation preferences, you may need to book a limousine, shuttle, or taxi from the airport to the hotel, or rent a car. Transportation is not just needed from the airport to the hotel but also to each meeting and possibly to dinner each evening. Planning the itinerary in advance with your employer will help you choose the best mode of transportation for the entire trip. Ask your employer's preference for pick up (limousine or taxi) or car rental (mid size car or SUV) to help ensure a hassle free travel experience. Your employer will need to know details including pick up time and location and drop off time and location. For both time and location, be as specific as you can. If your employer is meeting a shuttle or renting a car, telling them the location is terminal three may not be specific enough. Generally, payment or a deposit will need to be made at the time of reservation. A credit card is the preferred method of payment. Remember to get a confirmation number or confirmation email.

Travel Checklist

Booking Commercial Flights:

- Layover time should not be too long but must be long enough for your executive to walk through the concourses and make the connecting flights.
- Winter weather conditions can have an effect. If the connecting flight has the possibility of being late due to storms or severe rain, you may need to ensure that you allowed enough layover time due to a later arrival.
- Is this the best time of day for the executive to depart from their local airport based on when the executive needs to arrive at their destination?
- Is this the fastest route? Sometimes it is better to wait at the airport for a later direct flight than to take an earlier flight with connections.
- Is upgraded seating available? On longer flights, such as those which are three hours or longer, it is extremely beneficial to sit in first class to be able to spread out to get work done; not to mention the other benefits like good food!
- Will food be served during the flight? If so, is it a snack or meal? Is there a charge for the snack or meal?
- What other benefits does your executive have with the airlines or that are part of the executive's frequent flyer status level?
- Many airports have "fast line" status through security so that travelers who've obtained pre-check with TSA can go through on a separate line. Some airlines grant fast check to their frequent flyers.

Sometimes Travel Agencies Can Be Helpful:

- Can the travel agency find the most efficient way to structure your executive's travel given all factors of each trip, i.e., time frames, travel dates, meetings with customers, dinners, time to and from airports, expense, lodging, etc.?
- Ask about other options that better suit your executive that agencies may have more knowledge of.
- Do your own research regarding available flight(s) and then speak to the travel agent.
- Have you thought through the schedule that the travel agency gave you? Once the schedule has been identified, mentally "walk" the entire trip as if you were the traveler. Does it make sense?

What Meetings, Luncheons, or Dinners Should Be Scheduled?

- Team dinner
    - Who needs to be invited
    - Restaurant, club, or other venue
    - Any special communications from you to the team
    - Time
    - Celebrations (work service anniversary, birthday, life event)
- Town hall meetings
- Customer meetings
- Business colleagues
- Is there heavy email traffic for your traveler from someone in the destination city? If so, ask your traveler if scheduling a meal with that individual might be efficient.

Hotel Preferences:

- Does the executive prefer their room to be located away from the elevators and the very end of the hallway?
- Does your executive prefer certain floors (lower vs. higher)?
- Internet service
    - Free
    - Charge at $ per day (or 24 period)
- Concierge floor available?
        - Hours of operation
- Hotel shuttle service available
- Exercise facility
    - Located in the hotel?
    - Where or what floor in the hotel?
    - Hours of operation?

- Pool
    - Indoor
    - Outdoor: months that outdoor pool is open
- Restaurant(s) in the hotel
    - Full-service restaurant(s)
    - Latest that they serve dinner
    - Café only
    - Hours of operation
    - Room service 24/7
- Onsite business center (shipping packages, facsimile, printers)?

The Travel Itinerary Should Include the Following:

- The flight and hotel accommodations information.
- Weather report for each day in the arriving city and other cities that your executive might be visiting during his or her trip.
- Any issues or events in the arriving city that could affect your executive's travel into the city or when your executive departs the city.
- Is there a main contact who will be assisting your executive? What is their cell phone number (for emergencies or in-transit arrival delays or changes)?
- At the very top of the first page of the itinerary, have a noticeable box with **all** contacts' names and telephone numbers. Your executive should not have to hunt through the itinerary to locate these if he or she needs them quickly.
- Frequent flyer club information: locations of clubs at the various airport(s) that your executive is traveling from, to, or through for a connection.
- Provide the traveler a concourse map at the connecting airport, clearly highlighting where their airline frequent flyer status lounge is located so that they can rest or get work done while they wait.
- Remember to provide two copies of the itinerary package: one for the traveler and one to leave home so that the family can reach him or her.

Things to Leave at Home:

- Copy of their travel itinerary (and other important information)
- International trips:
    - Copy of passport (photo and visa pages)
    - Credit cards that your executive typically carries in his or her wallet but will not need to use during the trip
- Meeting materials:
    - Agenda

    - Executive’s notes, folders, files (soft or hard copies)
    - Handouts and other documents
    - PowerPoint slides (saved to USB?)
- Cash for travel:
    - Make sure that your executive has cash a few days before departing for the trip.
    - Tip money is always necessary in the United States. Some countries do not tip so beware of customs in the country you are visiting.

To and from Airport:

- Allow sufficient time to get to the airport before the flight.
- Arrange for transportation from the airport.
- Town car service: If using a town car service, where is the driver meeting your executive?
    - At the bottom of the airport escalators?
    - At baggage claim?
    - Curbside?
    - Does your executive need to call the driver upon his or her arrival?
    - Will the driver be holding a sign with your executive’s name on it near baggage or at the baggage carousel?
    - Or will the name card be placed in the car window for your executive to see at curbside?
    - Get the driver’s cell number and first name for your executive.
- Taxi: Where are the taxis located?
    - Is there a taxi booth or does your executive just step outside to the curb and wait for a taxi to pull up?
- Person: Will an individual be picking up your executive from the airport?
    - If so, provide all the details, especially their cell phone number.
- Car rental: Provide all the details for your executive.
    - Lyft/Uber: Provide the pickup locations for such services.
- Regardless of the mode of transportation, find out the travel time (not miles) from the airport to the destination (hotel or meeting venue).

To and from the Meeting or Conference Venue Each Day:

- How long does it take to get from where the hotel room is to the meeting or conference venue?
- Is it within walking distance? If yes, how long will it take?
- Does the hotel shuttle provide transportation? If yes, within how many miles?
- Who will be meeting your executive?
    - Provide the contact’s phone number and email in case there is a snafu.

    - Exactly where will they meet your executive once your executive arrives?
    - What time will they meet your executive?
- Will your executive have to go through any special security check or special badging?

Conference
Conferences are large meetings with hundreds to thousands of attendees. Conferences can be a money making venue for the company such as ComicCon, a way to present products and services to vendors, or training opportunities to impart specific knowledge. Conferences may have a number of presentations or vendor booths. Conferences may last several hours or several days. They generally need to be held in a hotel or conference center due to the large number of rooms and space required to achieve a successful conference.

If your employer is traveling to a conference, you will want to register early to receive the discounted rate. The dates and times of the conference will help determine travel dates.

Get a confirmation number or a confirmation email. Do not assume everything went through completely, especially if working over the internet. The confirmation is the security the reservation is complete.

Many companies will require a printed confirmation email or receipt for tax purposes. Check your company's policy for what documentation is needed for travel expense reporting.

Final Itinerary

Once you have the travel agenda (dates, times, and location of meetings) and all the travel arrangements made you need to complete a final itinerary for your employer to reference. It is recommended to type this in a location you and the employer may access at any time such as a shared Google Drive. The itinerary may also be printed out for the employer to take on the trip or emailed to the employer's smart phone to reference as needed.

A sample final itinerary is below.

Before the employer leaves, confirm they have all the following information:

1. Airline tickets (and Known Traveler Number (KTN) if applicable)
2. Hotel address and confirmation
3. Transportation information and confirmations
4. Credit card (most likely a company credit card to pay for travel expenses)
5. Government issued ID
6. Passport (if needed)
7. Itinerary and conference or meeting agendas
8. Presentations, reports, business cards
9. Laptop and cell phone

10. Time zones. When completing an itinerary, adapt for changes in Time Zones. (Most smart phones and laptops should automatically adjust to the current location time zone; however, your employer's watch may have to be manually updated.)

Name	Date/Time	Location and Notes
AZ time (MST)	LA Time (PST)	
	Monday, April 1	Phoenix, AZ to Los Angeles, CA
8:00 AM	9:00 AM	Leave Phoenix residence via City Taxi to Phoenix International Airport. Taxi phone number ###-###-####. Taxi confirmation number: ######
8:30 AM	9:30 AM	Arrive Phoenix International Airport. As you are not checking bags, you may proceed directly to security. Have ID and ticket ready for TSA Agent. Ticket shows KTN #, so you can proceed to the Priority line. You will not need to remove your shoes or jacket. You will need to place all metal and electronics in a bin for screening. After security, proceed to Gate B12 with your carry-on luggage and laptop bag.
10:00 AM	11:00 AM	Delta Flight D377 leaves from Gate B12 at 11:15 am. Window seat A, Row 10. Flight time is 1 hour and 33 minutes. Beverage will be served.
11:35 AM	12:35 PM	Arriving at Los Angeles International Airport. Follow the signs to baggage claim to find car rental.
12:00 PM	1:00 PM	Avis Car Rental will be the third car rental station on the north side. They have a SUV reserved for you. Confirmation # is ########. You will need to show ID.
1:00 PM	2:00 PM	Luncheon meeting with VP of Google, Matthew Stepka, 208 Rodeo Restaurant 208 North Rodeo Drive, Beverly Hills, CA 90210, Phone: (310) 275-2428 Google invited you, so they will pick up this tab.
3:00 PM	4:00 PM	Drive to hotel and check in Beverly Hilton Hotel 9876 Wilshire Blvd, Beverly Hills, CA 90210, Phone:(310) 274-7777
5:00 PM	6:00 PM	Dinner meeting with VP of Amazon, Shelley Reynolds A60 (Above Sixty) Restaurant, 9360 Wilshire Boulevard, Beverly Hills, CA 90212, Phone: (310) 388-6860 You invited Amazon, so you need to pay the tab. Get a printed receipt for the accounting office.
7:00 PM	8:00 PM	No scheduled events the rest of the evening. Review your conference presentation for 11AM on

		product W. Presentation notes are in the Google Shared Drive in the folder labeled April2LA.
	Tuesday, April 2	
5:00 AM	6:00 AM to 9:00 AM	Continental Breakfast served at hotel.
7:00 AM	8:00 AM	Drive to conference UCLA Lake Arrowhead Conference Center 850 Willow Creek Rd, Lake Arrowhead, CA 92352 Parking Map for free parking is attached. Registration is in the Main Lodge, Pineview Room.
8:00 AM	9:00 AM	Conference Registration in Main Lodge, Pineview Room. You are already registered so you just need to pick up your name badge and schedule. Meet and greet at Main Lodge, Skyview Room.
9:00 AM	10:00 AM	Keynote in Main Lodge, Lakeside room.
10:00 AM	11:00 AM	First break out session. You are presenting on Product W in Pine Lodge, room 36. There will be a projector for your laptop. Connection cord is in the laptop bag. Schematics are on the hard drive.
11:00 AM	12:00 PM	Luncheon meeting with Tesla at: Afghani Kabob House, 8560 Wilshire Boulevard, Beverly Hills, CA, Tel: (310) 854-1020 Tesla is interested in product A, take laptop to show schematics. If you pick up the tab, get a printed receipt for the accounting office.
2:00 PM	3:00 PM	Appointment with Stephen Allen of Allen, Matkins, Leck, Gamble, Mallory & Natsis. File in briefcase. 1416 Clovis Ave, Suite 206, Clovis, CA 93612, Phone: (559)400-7877
4:00 PM	5:00 PM	Appointment with Jack Ma in Beverly Hilton Hotel Lobby. Alibaba corporation file in your briefcase. His people said he only had one hour to meet with you but I left the evening open for dinner with Jack in case the meeting goes well. No dinner reservations were made though the Beverly Hilton has a 5 star restaurant on site and will accommodate you as a Hilton Gold Member. If you pick up the tab, get a printed receipt for the accounting office.
7:00 PM	8:00 PM	Check in for tomorrow’s flight using link in your email.

	Wednesday, April 3	Los Angeles, CA to Phoenix, AZ
7:00 AM	8:00 AM	Check out of the hotel, drive to Los Angeles International Airport in rental car, turn in rental car. Short walk to terminal 3 for flight.
8:00 AM	9:00 AM	As you are not checking bags you may proceed directly to security. Have your ID and ticket ready for the TSA Agent. The digital ticket will be in your email to access from your smartphone. Ticket shows KTN # so you can proceed to the Priority line. You will not need to remove your shoes nor jacket. You will need to place all metal and electronics in a bin for screening. After security proceed to Gate C10 with your carry on luggage and laptop bag.
9:00 AM	10:00 AM	Delta flight G733, Gate C10, leaves at 10:00 AM. One hour and 33 minute flight.
10:45 AM	11:45 AM	John Doe will be waiting at Terminal 3, Station C4 in a company car to drive you to a luncheon meeting with Michael John Gaugan (he owns South Pointe casino in Las Vegas. His son is race car driver Brendan Gaughan who is in town for the Nascar race this weekend.) Capital Grille 2502 E Camelback Rd, Phoenix, AZ 85016 Michael is interested in Product Y for his casino. Take the laptop to show him the schematics. John Doe and the company lawyer will attend this meeting. As this is a potential client pick up the luncheon tab. Get a printed receipt for the accounting office.
2:00 PM	3:00 PM	John Doe will drive you to your residence after the meeting concludes.

Appendix C –Filing Practice Answers

Practice Rule 1

Name	Unit 1	Unit 2	Unit 3	Alphabetize with 1 starting at the beginning and 5 at the end
Vic**t**ory Anderson	Anderson	Victory		2
Debbie Souther**n**	Southern	Debbie		5
Christian So**o**ther	Soother	Christian		3
Vic**k**i A. Anderson	Anderson	Vicki	A	1
William Southerly	Southerly	William		4

Practice Rule 2:

Name	Unit 1	Unit 2	Unit 3	Alphabetize with 1 starting at the beginning and 5 at the end
Elise Van Der Hoff	VanderHoff	Elise		3
Kelli O'Neal	Oneal	Kelli		2
Jack O'Clay	Oclay	Jack		1
Cynthia Van Metry	Vanmetry	Cynthia		5
Charles VanMetry	Vanmetry	Charles		4

Practice Rule 3:

Name	Unit 1	Unit 2	Unit 3	Alphabetize with 1 starting at the beginning and 6 at the end
Kim Wang	Wang	Kim		5
Shelly-Lee Ackerman	Ackerman	Shellylee		1
Gina James-Ackerman	Jamesackerman	Gina		4
Jackie Everson	Everson	Jackie		3
Angela-Marie D'Everson	Deverson	Angelamarie		2
Kim Wang-Lu	Wanglu	Kim		6

Practice Rule 4:

Name	Unit 1	Unit 2	Unit 3	Alphabetize with 1 starting at the beginning and 6 at the end
B.J. Christensen	Christensen	B	J	2
J.O. McVey	Mcvey	J	O	4
K.T. Banks	Banks	K	T	1
Lou May-Vickers	Mayvickers	Lou		5
Joe McVey	Mcvey	Joe		6
Ben J. Christensen	Christensen	Ben	J	3

Practice Rule 5:

Name	Unit 1	Unit 2	Unit 3	Unit 4	Alphabetize with 1 starting at the beginning and 6 at the end
Jeffrey A. Quinley, III	Quinley	Jeffrey	A	III	4
Ms. Katrina Chance	Chance	Katrina	Ms		2
Senator Jack Rigley	Rigley	Jack	Senator		6
Prince Phillip III	Prince	Phillip	III		3
Mrs. Katrina Chance, CPA	Chance	Katrina	Mrs	CPA	1
Dr. Jack Rigley	Rigley	Jack	Dr		5

Practice Rule 6:

Name	Unit 1	Unit 2	Unit 3	Unit 4 (+)	Alphabetize with 1 starting at the beginning and 6 at the end
The Paris Daily News	Paris	Daily	News	The	4
South-West Lawn Care	Southwest	Lawn	Care		5
Camino's Clothing Accessories	Caminos	Clothing	Accessories		1
The El Camino Horse Club	Elcamino	Horse	Club		3
Dr. Betty Johnson Elementary School	Dr	Betty	Johnson	Elementary School	2
The Southwest's Lawn Care	Southwests	Lawn	Care	The	6

Practice Rule 7:

Name	Unit 1	Unit 2	Unit 3	Unit 4	Alphabetize with 1 starting at the beginning and 6 at the end
P J Golf Course	P	J	Golf	Course	5
CA Carpets Ltd.	CA	Carpets	Ltd		2
Garner and Garner, Attys.	Garner	And	Garner	Attys	3
C K W Towing	C	K	W	Towing	1
GTE Electric Co.	GTE	Electric	Co		4
PJG Manufacturing	PJG	Manufacturing			6

Practice Rule 8:

Name	Unit 1	Unit 2	Unit 3	Unit 4	Alphabetize with 1 starting at the beginning and 6 at the end
Nor-East Import's	Noreast	Imports			4
Do-Rite Medical Supplies	Dorite	Medical	Supplies		2
The On/Off Freeway Café	Onoff	Freeway	Cafe	The	6
Nell-Carter Law Firm	Nellcarter	Law	Firm		3
A-OK Repair Service	Aok	Repair	Service		1
North-East Import's	Northeast	Imports			5

Practice Rule 9:

Name	Unit 1	Unit 2	Unit 3	Unit 4	Alphabetize with 1 starting at the beginning and 6 at the end
The Makco Five, Inc.	Makco	Five	Inc	The	5
6^{th} Avenue Apts.	6	Avenue	Apts		1
Makco 5 Gas Station	Makco	5	Gas	Station	4
Sixth Dimension Insurance Co.	Sixth	Dimension	Insurance	Co	6
62^{nd} Street Deli	62	Street	Deli		2
Makco 5-2	Makco	5			3

Practice Rule 10:

Name	Unit 1	Unit 2	Unit 3	Unit 4 (+)	Alphabetize with 1 starting at the beginning and 6 at the end
#1 Auto Repair Shop	Number1	Auto	Repair	Shop	5
$ Saved Used Furniture	Dollar	Saved	Used	Furniture	4
The 99¢ Bargain Basement	99cent	Bargain	Basement		2
#One Appliances	Numberone	Appliances			6
Dollar Drug Store	Dollar	Drug	Store		3
9^{th} Street $ and ¢ Store	9	Street	Dollar	And Cents Store	1

Practice Rule 11A:

Name	Unit 1	Unit 2	Unit 3	Unit 4 (+)	Alphabetize with 1 starting at the beginning and 5 at the end
Seattle Police Dept, Seattle, Washington	Seattle	Police	Department	Seattle Washington	4
Travis County Medical Examiner, Travis, Missouri	Travis	County	Medical	Examiner Travis Missouri	5
Department of Health, Ferris County, Vermont	Ferris	County	Department	Of Health Ferris County Vermont	1
Department of Tourism, State of Maine	Main	Department	of	Tourism	2
Department of Education, New York State	New	York	Department	Of Education	3

Practice Rule 11B:

Unit 1	UNITED	Unit 2	STATES	Unit 3	GOVERNMENT

NOTE: Because space is limited in the example below, Unit 1, Unit 2 and Unit 3 are displayed above and indexing begins with Unit 4.

Name	Unit 4	Unit 5	Unit 6	Unit 7 (+)	Alphabetize with 1 starting at the beginning and 5 at the end
U.S. Department of Interior, National Park Service	Interior	National	Park	Service	3
Bureau of Engraving and Printing, U.S. Department of Commerce	Commerce	Department	Bureau	Of Engraving And Printing	1
Internal Revenue Service, U.S. Department of the Treasury	Treasury	Department	Internal	Revenue Service	5
U.S. Department of Education	Education	Department			2
Federal Aviation Administration, U.S. Department of Transportation	Transportation	Department	Federal	Aviation Administration	4

Practice Rule 11C:

Name	Unit 1	Unit 2	Unit 3	Unit 4+	Alphabetize with 1 starting at the beginning and 5 at the end
Ministry of Agriculture, Venezuela	Venezuela	Agriculture	Ministry	Of	4
Industrial Development Authority, Portugal	Portugal	Industrial	Development	Authority	3
Department of State, Australia	Australia	State	Department		1
Bureau of Mining, Republic of Zaire	Zaire	Republic	Of	Bureau Of Mining	5
Ministry of Education, Republic of China	China	Republic	Of	Ministry Of Education	2

Practice Rule 12:

NOTE: Because space is limited in example below, Unit 1 is displayed above and indexing begins with Unit 2.

	Unit 1	Mountain Bank			
Name	Unit 2	Unit 3	Unit 4	Unit 5 (+)	Alphabetize with 1 starting at the beginning and 4 at the end
Mountain Bank 450 Cedar Drive Pittsburgh, PA	Pittsburgh	Pennsylvania	Cedar	Drive 450	3
Mountain Bank 115 Concord Road Pittsburgh, PA	Pittsburgh	Pennsylvania	Concord	Road 115	4
Mountain Bank 4500 Cedar Ave Houston, TX	Houston	Texas	Cedar	Ave 4500	1
Mountain Bank 75 Concord Road Houston, TX	Houston	Texas	Concord	Road 75	2

Appendix D –Templates

Hard Skills

Rate your skills based on a scale of 1 to 5.
1 = I do not have this skill.
2= I have this skill at a minimum level.
3= I am adept at this skill.
4= I am proficient at this skill.
5= I am a master at this skill and can teach it to others.

Skill	W02	W07
Records Management		
Filing and indexing.		
Processing messages and correspondence.		
Take accurate notes and transcribe content.		
Photocopy, fax, and scan documents.		
Maintain computer files and databases.		
Document preparation and editing.		
Create and analyze reports.		
Plan and coordinate meetings.		
I can use software applications.		
Present using correct English to effectively persuade, inform, and convey ideas.		
Prioritize tasks and projects.		

Manage calendars (potentially multiple ones) and appointments.		
Send reminders to keep projects or tasks on schedule.		
I can use the internet for research.		
I can answer multi-line phones and route calls.		
What is your current typing speed?		
Detail-oriented.		
Problem-solver.		
My current typing speed is at least 50 words per minute?		

Keep these scores as you will use them in W07.

Soft Skills

Rate your skills based on a scale of 1 to 5.
1 = I do not have this skill.
2= I have this skill at a minimum level.
3= I am adept at this skill.
4= I am proficient at this skill.
5= I am a master at this skill and can teach it to others.

Skill	**W02**	**W07**
I get along with people who think differently than me.		
I show empathy toward others.		
I work well with diverse groups of people.		
I am an effective problem-solver.		
I manage my emotions well.		

I positively motivate others.		
I work well on a team.		
I am responsible for my knowledge.		
I am willing to learn.		
I am willing to change.		
I am willing to improve.		
I use leadership skills to benefit my team.		
I work toward conflict-resolution.		
I do not procrastinate.		
I use good communication skills.		
I respond to people's concerns in a professional manner.		
I speak clearly and succinctly.		
I use my work time ethically.		
I have a positive attitude.		
I manage my workload.		
I schedule priorities.		
I keep confidential information confidential.		

Keep these scores as you will use them in W07.

Interoffice Memorandum

To: Replace this text with your instructor’s name
From: Replace this text with your name
Subject: Filing System
Date: Replace this text with today’s date

Filing System
Replace this text with your assignment.

Benefits I will gain by using this filing system.
Replace this text with your own words

Issues or problems I encountered in developing this system
Replace this text with your own words.

How I can apply what I learned to my current or future employment.
Replace this text with your own words.

Picture of my filing system.
Replace this text with your image.

W03 Proofread Email

Subject line: why you should switch to eletters instead of newsletters.

I sent this email to alert you to a way to save money.

Newsletters are periodicals used to advertise or update our costumers with information about your product or blog. they can be printed or emailed and are an excellent way to maintain regular contact with our costumers and drive traffic to your site. however, there is a lot of expense with printed newsletters (paper printing stamps) and there are no assurance that your costumers received our document.

having used an eletter can be an effective lowcost method for staying in touch with your customers it helps reduce churn and can easily generate more business from customers you have already spent a great deal of effort to win since there are no mailing and printing costs involved it is also very gentle to your bottomline another benefit is the almost instantaneous delivery that email affords you dont worry whether the Post Office will get the newsletter to your customers in time for them to take advantage of a special offers.

microsoft office word makes it simple to create and send eletters. costumers will appreciate the regular communication and you could be rewarded with more business from your existing costumer base.

You need to show the changes you are suggesting for your colleague so they know what to changed. So your document would look something like the following:

M~~m~~icrosoft O~~o~~ffice ~~W~~word makes it simple to create and send e-letters. ~~costumers~~ Customers will appreciate the regular communication and ~~you~~ we could be rewarded with more business from ~~y~~our existing ~~costumer~~ customer base.