



现代服务领域技能型人才培养模式创新规划教材
中国高等职业技术教育研究会科研项目优秀成果

文秘专业

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涉外秘书 沟通实务



中国水利水电出版社
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内 容 提 要

本书根据以工作岗位的职业要求为目标,以就业为导向,以“必需、够用”为度,以培养学生综合素质和实践能力为主线的要求设计开发而成。

全书以秘书的四大主要工作内容(办公室事务、商务旅行、接待事务、会议事务)的实际流程为主线,以项目导向、任务驱动、工学结合的教学模式来建构教学内容,突出操作性。以案例导入,并加以阐释分析知识点,让学生掌握具体工作场景中语言的恰当使用。训练部分以涉外秘书沟通的工作任务或任务过程为工作情景来设计实训题目,确定能力训练目标,最后测评和反馈。

该书适合作为高职高专秘书专业、英语专业秘书方向的教材,也可以作为中职秘书专业的核心教材。

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图书在版编目(CIP)数据

涉外秘书沟通实务 / 韩乃臣, 刘轶新主编. — 北京
: 中国水利水电出版社, 2011. 6
现代服务领域技能型人才培养模式创新规划教材
ISBN 978-7-5084-8635-2

I. ①涉… II. ①韩… ②刘… III. ①对外经济—秘
书学—职业教育—教材 IV. ①F114②C931.46

中国版本图书馆CIP数据核字(2011)第094905号

策划编辑: 胡海家 责任编辑: 杨元泓 加工编辑: 陈洁 封面设计: 李佳

书 名	现代服务领域技能型人才培养模式创新规划教材 涉外秘书沟通实务
作 者	主 编 韩乃臣 刘轶新 副主编 丁丽岩 张士云 张 弓 杨 清
出版发行	中国水利水电出版社 (北京市海淀区玉渊潭南路1号D座 100038) 网址: www.waterpub.com.cn E-mail: mchannel@263.net (万水) sales@waterpub.com.cn 电话: (010) 68367658 (营销中心)、82562819 (万水)
经 售	全国各地新华书店和相关出版物销售网点
排 版	北京万水电子信息有限公司
印 刷	三河市鑫金马印装有限公司
规 格	184mm×260mm 16开本 8.5印张 207千字
版 次	2011年6月第1版 2011年6月第1次印刷
印 数	0001—3000册
定 价	16.00元

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实践先进课程理念 构建全新教材体系

——《现代服务领域技能型人才培养模式创新规划教材》

出版说明

“现代服务领域技能型人才培养模式创新规划教材”丛书是由中国高等职业技术教育研究会立项的《现代服务业技能人才培养培训模式研究与实践》课题^①的研究成果。

进入新世纪以来,我国的职业教育、职业培训与社会经济的发展联系越来越紧密,职业教育与培训的课程的改革越来越为广大师生所关注。职业教育与职业培训的课程具有定向性、应用性、实践性、整体性、灵活性的突出特点。任何的职业教育培训课程开发实践都不外乎注重调动学生的学习动机,以职业活动为导向、以职业能力为本位。目前,职业教育领域的课程改革领域,呈现出指导思想多元化、课程结构模块化、职业技术前瞻化、国家干预加强化的特点。

现代服务类专业在高等职业院校普遍开设,招生数量和在校生人数占到高职学生总数的40%左右,以现代服务业的技能人才培养培训模式为题进行研究,对于探索打破学科系统化课程,参照国家职业技能标准的要求,建立职业能力系统化专业课程体系,推进高职院校课程改革、推进双证书制度建设有特殊的现实意义。因此,《现代服务业技能人才培养培训模式研究与实践》课题是一个具有宏观意义、沟通微观课程的中观研究,具有特殊的桥梁作用。该课题与人力资源和社会保障部的《技能人才职业导向式培训模式标准研究》课题^②的《现代服务业技能人才培养培训模式研究》子课题并题研究。经过酝酿,于2008年底进行了课题研究队伍和开题准备,2009年正式开题,研究历时16个月,于2010年12月形成了部分成果,具备结题条件。课题组通过高等职业技术教育研究会组织并依托60余所高等职业院校,按照现代服务业类型分组,选取市场营销、工商企业管理、电子商务、物流管理、文秘、艺术设计专业作为案例,进行技能人才培养培训模式研究,开展教学资源开发建设的试点工作。

《现代服务业技能人才培养培训方案及研究论文汇编》(以下简称《方案汇编》)、《现代服务领域技能型人才培养模式创新规划教材》(以下简称《规划教材》)既作为《现代服务业技能人才培养培训模式研究与实践》课题的研究成果和附件,也是人力资源和社会保障部部级课题《技能人才职业导向式培训模式标准研究》的研究成果和附件。

《方案汇编》收录了包括市场营销、工商企业管理、电子商务、物流管理、文秘(商务秘书方向、涉外秘书方向)、艺术设计(平面设计方向、三维动画方向)共6个专业8个方向的人才培养方案。

《规划教材》是依据《方案汇编》中的人才培养方案,紧密结合高等职业教育领域中现代服务业技能人才的现状和课程设置进行编写的,教材突出体现了“就业导向、校企合作、

① 课题来源:中国高等职业技术教育研究会,编号:GZYLX2009-201021

② 课题来源:人力资源和社会保障部职业技能鉴定中心,编号:LA2009-10

双证衔接、项目驱动”的特点，重视学生核心职业技能的培养，已经经过中国高等职业技术教育研究会有关专家审定，列入人力资源和社会保障部职业技能鉴定中心的《全国职业培训与技能鉴定用书目录》。

本课题在研究过程中得到了中国水利水电出版社的大力支持。本丛书的编审委员会由从事职业教育教学研究、职业培训研究、职业资格研究、职业教育教材出版等各方面专家和一线教师组成。上述领域的专家、学者均具有较强的理论造诣和实践经验，我们希望通过大家共同的努力来实践先进职教课程理念，构建全新职业教育教材体系，为我国的高等职业教育事业以及高技能人才培养工作尽自己一份力量。

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前言

自 20 世纪 70 年代后期中国改革开放初始起,越来越多的合资企业、三资企业和外资企业进入中国大陆,涉外秘书也随之成为必不可少的工作岗位和职位。除去熟练掌握一种(或多种)外语,在工作中熟练使用现代化高科技办公设备、通晓贸易和法律知识、具备优秀的协助和协调专业能力,还有在跨文化沟通中做到游刃有余,所有这些都是涉外秘书所应该具备的素质和技能。

在西方国家,从事涉外秘书这种工作的人常常称为行政专业人士,其工作内容远非仅仅打字和接听电话(参见国际职业秘书协会网站 IAAP: <http://www.iaap-hq.org/>)。涉及这个岗位有几个称谓,即 PA, EA, AA, 需要做一说明: PA, 私人助理(Personal Assistant)的首字母缩写,也常称为总经理或总裁秘书,管理办公室日常事务(会议、信件往来、行程安排、会见等)和上司的个人事务(子女入托或入学、理发、体检、亲友宴会、给配偶买礼物、娱乐活动等); EA, 执行助理(Executive Assistant)的首字母缩写,常辅助财务主管或其他执行主管等的工作;而在大型公司辅助团队或某个部门主管工作的称为行政助理(Administrative Assistant, AA),比如销售部秘书,但是在另外一家专业性公司可能就是管理性工作的助理了。AA(行政助理)更多可看做是私人助理和执行助理的总称。称呼之所以有各种不同,实质上是由助理人员在各家公司的组织层次中辅助和汇报的不同对象决定的。如果有工作的需要,行政助理会在公司的各个部门各个层次发挥不可替代的作用,甚至有些助理有时会代替老板在一些事务上做决定。这样一来,私人助理(PA)或执行助理(EA)很可能会发展为职业经理人。

优秀的行政助理能尽善尽美地辅助其上司的工作。行政助理常常将每一件事情悉心考虑,了解他的管理模式和做事风格,处处为上司考虑周全周到,不仅仅做好本职日常工作和上司交代的工作,还要提前想到上司下一步的安排,预计其需要的帮助,适当时候,还能为其提供建议和实质性的处理手段和方法,为上司的工作和生活铺平道路。学会并帮助上司和其他各个部门、公司上下的员工加强沟通,为上司考虑在前,默默提供支持,平易近人,处事不惊。

秘书或行政助理是上司的左膀右臂,想其所想,考虑周全周到。同时行政助理每天都在和人打交道,沟通是其天职,是工作生命的基本元素。他们通过口头和书面形式,无时不刻传达和接收来自上司、同事或公司客户的信息。

《涉外秘书沟通实务》是国内第一本英文写就的实际操作的秘书实务教材,涵盖涉外秘书实际工作的主要方面:办公室日常事务、商务旅行、接待事务、会议事务。整本教材以秘书的四大主要工作内容的实际流程为主线,以项目导向、任务驱动、工学结合的教学模式来构建教学内容,突出操作性。以案例导入,并加以阐释分析知识点,让学生掌握具体工作场景中语言的恰当使用。训练部分以涉外秘书沟通的工作任务或任务过程为工作情景来设计实训题目,确定能力训练目标,最后测评和反馈。该教材的另一重点是让学员学习用恰当的英语来完成各项工作。全体编著者希望本书能帮助读者对这个必不可少的而且充满挑战的职业有更深刻的了解,并且对秘书使用的语言有所掌握,也希望能帮助从业人员成长为自信、优

秀的行政助理。

本书是秘书类教材工学结合的首次尝试。在编写过程中，编著者很难涵盖秘书工作的方方面面，未来的修改和补充必不可少，编著者还将与时俱进，积累更多、更好、更贴近秘书实际工作的材料和资源。本书自然也是引玉之作，所有编写人员都真诚期待亲爱的读者提出宝贵意见，以便在未来的修订中不断精进。

本书编写人员

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项目二 张士云

项目三 代晓丽

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项目二 杨清

项目三 丁丽岩

第三章 接待事务

项目一 白冰

项目二 张弓

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项目一 刘轶新

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审阅、校对 韩乃臣

编者

2011年3月

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Chapter One Office Routines

1. Telephone Communication
2. Mail Management
3. Time Management

Overview

Such office routines as telephone communication, mail and time management, are very important. Whether secretaries could manage well can even sometimes decide the company's fate. Secretaries should know how to express themselves with witty words to leave a good impression with telephone communications, which is the Project One focus.

Mails, one of the most important way to communicate in business, mainly fall into two types: carbon (letters, parcels, telegrams, etc.); digital (e-mail, fax, etc). With the development of the technology, digital means become more frequently used. In this Project Two, the focus will be on letters and e-mails: receiving letters or e-mails, sending letters or e-mails. In any company the answer sheet should be in a certain form, which is kept in the computer and can be found whenever used. The certain form of answering letters could leave a deep, orderly, and good impression. Time is an elusive resource. Time cannot be recaptured or stored to use later. The secretary needs to master some useful time management skills and tips. Project Three explores the methods, procedures and tools of time management.

Project One Telephone Communication 电话沟通

Goals and objectives

To learn to effectively managing telephone communications.

Knowledge

To know telephone etiquette, telephone message taking and telephone responsibilities.

To learn useful expressions for telephone communication.

Skill

To practice good telephone courtesy.

To develop telephone communication skills.

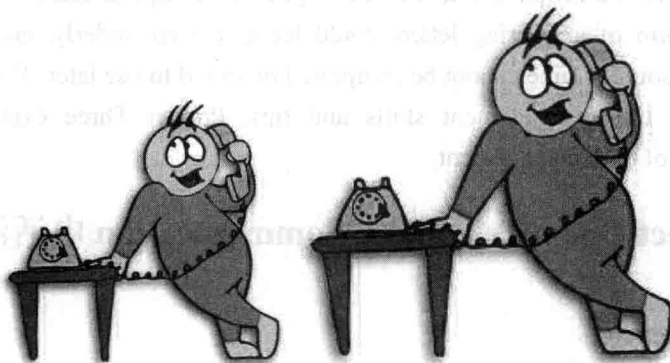
To learn to perform telephone responsibilities by handling various telephone calls properly: Making calls, taking and transferring calls, screening calls, etc.



Part one: General knowledge 知识目标

How to handle telephone communication properly 如何正确处理电话交流

Secretaries handle telephone communication every day. Screening calls is often an unpleasant part of the job. But it is sometimes necessary because the person for whom you are screening does not always have time to talk or want to talk to the caller. In the opening case, the receptionist is not successful in screening the coming calls since she leaves doubt that Ms. Stell is THERE in the office by asking who the caller first instead of declaring that Ms. Stell's unavailability.



Case study 1 案例分析 1

Caller: I need to speak with Ms. Stell, right away.

Receptionist: May I get your name and number please?

She should put this way

Receptionist: "I'm sorry, Ms. Stell is unavailable at this time, may I take your name and number and have her return your call? Or may I help you?"

Case study 2 案例分析 2

Receptionist: Bookkeeping, James Stewart.

Caller: I need to speak with Ms. Stell, right away.

Receptionist: May I get your name and number please?

Caller: This is Sam Davis and I need to speak with Ms. Stell.

Receptionist: Let me check to see if she is in, will you hold please?

Caller: Yes, thank you I'll hold.

Receptionist: I'm sorry, Ms Stell is not available, Let me take your number and have her return the call.

Caller: No, I'll hold until she can take my call.

(From *Telephone etiquette*, p11, Southern Illinois University Carbondale)

In the above telephone communication, why does Mr. Davis think that Ms. Stell is in the office? What did the caller (Mr. Sam Davis in this case) have the impression that Mr. Davis is available but refuses his access? Is there something that the receptionist says has given such expectation?

The better telephone communication may be 正确得体的电话沟通应该是

Receptionist: Bookkeeping, James Stewart.

Caller: Is Ms. Stell available?

Receptionist: I'm sorry, Ms. Stell is unavailable at this time, may I take your name and number and have her return your call? Or may I help you?

Caller: This is Sam Davis, would you please tell her I called, she has my number.

Receptionist: Mr. Davis, she has asked me to interrupt if you should call, so please hold while I tell her you are on the line.

(*Telephone etiquette*, p10, Southern Illinois University Carbondale)

Telephone etiquette 电话礼仪

Identify yourself professionally 职业性介绍自己

Whether you're receiving a call or making a call, a customer should never be in doubt about who they are speaking to. Never should they ask "Sorry, what company are you calling from?" If we speak to lots of customers who have some confusion about which company called them, and that's an immediate sign of failing to identify yourself professionally. We even get complaints from customers about companies that weren't the cause of the complaint!

When identifying yourself, mention your name and your company name—preferably at the beginning of the call and once more if you can work it in. If appropriate, also put yourself in the picture that the customer may have of the company already for example "You received a quote from my colleague John about your hot water system yesterday, and I'm the person who will be doing the job. Do you have any questions for me?". This ensures there is no confusion on the customer's side and they also get a great impression of your company's internal communication.

Customers, especially the ones that are uncertain about details and afraid to ask questions, will feel more comfortable talking to you if they're not obsessing about embarrassing themselves by calling you the wrong name or confusing your company with another!

Be well understood 正确传达信息

This one's a no brainer but sometimes we get so caught up in the necessary speed of life (or in fact the customer's speed of life) so we rush through a call. Slow the pace down, enunciate your words, moderate your voice volume (especially if you're on a noisy site and tempted to shout to be heard above the hammering/drilling).

Keep the tone professional but friendly 语气职业且友好

The tone of your conversation is set by two things—your attitude and your language. Your attitude should be easy enough to keep positive, but even on 'down' days or when you're really busy keep your attitude focused (but unhurried), enthusiastic and attentive. Be attentive and conversation but try not to ask questions if you're not interested in the answer—it's hard to fake interest in stories about pets and random people you don't know!

Your language use can be trickier. Use simple words and no jargon or industry lingo, don't be too casual and of course remember to make any points or ask questions that you need to. If you naturally use "fillers" when you speak, such as "um", or phrases such as "like" or "you know", train yourself carefully not to use these when you speak on the phone. Customers usually don't notice this but your overall impression will be more positive if you avoid the fillers.

Be practical if you get stuck 遇到问题时

When you're dealing with a particularly difficult topic and get yourself tied up—be practical. Instead of giving the customer vague information, tell them "I don't know the answer to that—let me find out and ring you right back". Or if you know you can get the information quickly, give them the option to hold on while you find out "I need to get that information quickly, would you like to hold for 30 seconds or would you prefer that I call you back?"

Be yourself 自如

Some of the advice above may seem like to give good customer service you need to have a personality transplant. But that's not true—these are just principles you should adopt that will allow you to be yourself freely and still have great conversations with your customers.

Take notes 电话记录

If you handle a lot of calls each day, then it is essential to log each one under date and time. For all calls you should make a note of who rang, for what reason, and the action you agreed with times and details of address, telephone number etc.

Things to avoid when on the phone 电话沟通应避免的事项

It's easy to fall into the trap of believing that because your caller can't see you, they won't be affected by what you are doing and what's going on around you. Remember not to:

- let it ring more than four times
- eat and drink while talking on the phone
- be too familiar
- talk to someone else in your office
- have too much background noise
- speak too quietly or too loudly

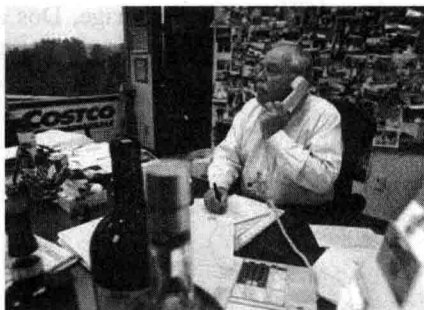
- speak too quickly.

Part two: Field Practice 实训练习

I. Scenario 实训场景

The telephone communication task is accomplished in three sessions: telephone etiquette, answering phones, making calls.

Practice 1: telephone etiquette 电话礼仪



Group work on a telephone call: act out a telephone communication and evaluate according to the rubric.

Group performance 小组练习

Students work in groups, observing and identifying regularities in telephone etiquette.

Reporting orally 口头汇报

After 15-minute discussion, each group representative reports their findings; as the students reports, the teacher lists the findings on the chalkboard telephone manners.

Summarizing 总结

Based on the findings, students summarize the language, Dos and Don'ts; students work out etiquette rubric for a good telephone communication.

Practice 2: answering calls 接电话



Group work on a telephone call: act out answering calls and evaluate, taking into consideration

telephone etiquette and skills in handling calls.

Group performance 小组练习

Each group act out answering calls. Students work in groups, observing and identifying regularities in answering calls.

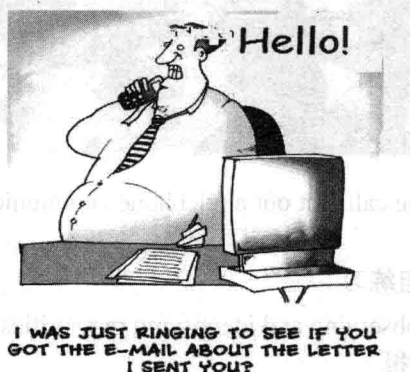
Reporting orally 口头汇报

After 15-minute discussion, each group representative reports their findings; as the students reports, the teacher lists the findings on the chalkboard: steps in answering calls, dos and don'ts, useful expressions.

Summarizing 总结

Based on the findings, students summarize the language, Dos and Don'ts; students work out steps and necessities in answering phones. Work out a rubric in answering calls.

Practice 3: making calls 打电话



Group work on a telephone call: act out making calls and evaluate, taking into consideration telephone etiquette and skills in handling calls.

Group performance 小组练习

Each group acts out making calls. Students work in groups, observing and identifying regularities in making calls.

Reporting orally 口头汇报

After 15-minute discussion, each group representative reports their findings; as the students report, the teacher lists the findings on the chalkboard: steps in making calls, dos and don'ts, useful expressions.

Summarizing 总结

Based on the findings, students summarize the language, Dos and Don'ts; students work out steps and necessities in making calls. Work out a rubric in making calls.

II. Requirements 实训要求

Real telephones are expected to be used in the practice. Students work in groups; one acts as Vivian, some as the callers, the callees (director, ticket office, Mr. Jones), one as the President, and