

高职高专商务英语系列教材

Corporate Secretarial Practice

商务秘书实务



Corporate Secretarial Practice

主 编：薛宁地



外语教学与研究出版社

FOREIGN LANGUAGE TEACHING AND RESEARCH PRESS

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序 言

顺德职业技术学院外语系的几位教师编写的《商务秘书实务》即将由外语教学与研究出版社出版，该系副主任张文莲副教授请我写一篇序言，我非常乐意接受这项工作。

近三十年来，我国经济高速发展并与国际接轨，社会需要大量能够使用中英两种语言有效地处理商务文秘事务的应用型人才。顺应这种需求，很多高职高专院校开设了英文商务文秘专业或课程，但是正式出版的相关教材为数不多，而且都需要修缮更新。这部新教材的推出将改善这种教材匮乏的状况。

该教材的编者都是具有多年教学经验的教师，了解教学规律。此外，他们中一部分人具有企业工作经历，尤其是教材主编薛宁地先生。他曾在外资、合资和国内企业工作多年，积累了丰富的实际工作经验，充分了解一个称职的商务秘书需要掌握的知识和技能。由于这种背景，编者能够在教材中呈现实际工作的真实要求。

这部教材清晰地展现了现时国际商务文秘工作的主要内容，具有明确的职业知识和能力指标。在编写过程中，他们参考了一批国内外较有权威性的文献，注意在内容和格式方面反映新的变化。他们参考的文献全部都是1990年之后、甚至是2006年的最新文献，其中还包括我国劳动和社会保障部关于秘书职业鉴定的要求和建议，因此本教材有助于学习者报考秘书职业资格证书。

主编薛宁地先生长期使用英语工作和从事英语教学，英文基础扎实。同时，全书又经过具有Alliant International University教育学博士学位的美国专家Charles Kieffer的校阅和修改，因此语言规范，准确。

可以说这是一部简明、规范和实用的教材，适用于高校商务文秘专业或课程，能够对该类人才的培养起到很好的作用。

蔡芸

广东外语外贸大学商务英语学院

2007年5月

前言

从 20 世纪 80 年代初开始,我在珠江三角洲一带的企业里从事白领工作,多数时间是在外资或合资企业,其中在美国的一家钻井公司、瑞典的一家电信公司和德国的一家仪器公司工作的时间,加起来有十多年。这期间,我与商务秘书有大量的接触,和他们的关系经历了一个大的转变过程,即从开始时的观察他们工作、向他们请教,到后来的指导和培训他们。那时候,因为合适的教材不容易找到,我曾经希望自己能编一本适合涉外的商务秘书使用的培训教材,无奈工作繁忙,未能如愿。近年来,我在顺德职业技术学院外语系任教,讲授秘书实务课程。初时,仍旧找不到合适的用英文编写的教材。中文的教材不能让外语专业的学生得到足够的语言方面的“营养”;若给学生发中文教材,老师却用英语讲课,师生均会感到有些别扭。外国人编写的英文秘书教材是有的,但并不适合中国的国情。于是我只能自己动手编写讲义。这本书主要是在我的授课讲义的基础上编写的。

随着经济全球化的步步推进和我国改革开放的不断深入,我国的企业、外国企业在中国的分支机构以及中外合资企业等,都需要英文娴熟的秘书。这给我国高职高专院校英语专业的学生提供了很大的发挥作用的“舞台”。在成为一个商务秘书之前,有必要掌握一些秘书工作的知识和技能。即使不是担任秘书工作,对于在企业工作的人,掌握一些文秘的知识和技能,也是有益处的,它可以使你的工作更规范,效率更高。

在本书的编写过程中,编委会各成员都做了不少工作。张文莲老师和杨爱国老师做了很多相关的组织工作,并提了周密的指导意见。李宗文老师编写了大部分的习题并提供了全部习题的答案。胡艳老师重新制作了所有的 PowerPoint 课件。特别要感谢的是原我校美籍教师 Charles Kieffer 博士。他极认真地阅读了本书的每一章节,提出了详细的修改意见。这本书是编委会集体智慧的结晶。

外语教学与研究出版社的编辑朱书义女士也做了很多工作,对本书的结构和内容都提出了很多宝贵的意见,编者在此表示感谢。

当初编写讲义时,我曾经参考了许多英美商务秘书教材和有关书籍,以及互联网上的一些材料,从中吸收了不少“养分”。现特地向这些书籍和材料的作者表示感谢。本书后的参考文献表中列出了我们曾参考过的主要教材、书籍和论文。

本书适用于高职高专院校英语专业二三年级学生的文秘课程,也可用于本科的类似课程。此外,本书也可供企业文秘人员作自我进修的教材或参考用书。本书适用于 48~68 学时的课程。教学的环境最好是学生人手一台电脑的实训室。教学的方法应该是以实践为主,注重学生的动手练习。书中各章节相对独立,教师不必按现有的章节顺序进行教学,可自己排进程。本教材的 PowerPoint 课件,在出版社的网站上可以免费下载,教师可参考使用。

由于编者水平有限，本书中一定会有不当之处，希望读者指正。如有任何指导意见或建议，请发送电子邮件到 xueningdi2006@163.com，编者不胜感激！本书再版时，我们将根据使用者的反馈信息对全书进行修订。

薛宁地

2007 年 5 月于顺德碧桂园湖畔

Contents

Module 1 General Knowledge 秘书工作基本知识.....	1
Chapter 1 Introduction to the Secretarial Profession 秘书职业简介.....	3
Chapter 2 Fundamentals of Business Etiquette 商务礼仪基础.....	9
Chapter 3 Corporate Secretarial Ethics 秘书职业道德.....	18
Module 2 Written Communications 写作知识.....	23
Chapter 4 An Overview of Business Writing 商务英语写作概览.....	25
Chapter 5 Creating Business Letters in English 商务信函写作.....	37
Chapter 6 Writing Memos in English 备忘录写作.....	55
Module 3 Routine Work 秘书常规工作.....	67
Chapter 7 Telephone Etiquette 电话沟通礼仪.....	69
Chapter 8 Meeting Organization 组织会议.....	81
Chapter 9 Presentation Development 开展讲座.....	90
Chapter 10 Travel and Accommodation Arrangements 旅行和住宿安排.....	97
Chapter 11 Business Entertaining 商务宴请.....	108
Module 4 Senior Duties 高级秘书职责.....	119
Chapter 12 Balance Sheet Composition 制作资产负债表.....	121
Chapter 13 Payroll Sheet Composition 制作员工工资表.....	129
Chapter 14 Petty Cash Management 小额现金管理.....	136
Chapter 15 Foundations of Human Resource Management 人力资源管理基础.....	144
Chapter 16 Public Relations 公共关系基础.....	152
Module 5 Job-seeking 求职.....	159
Chapter 17 Writing Resumes in English 英文简历写作.....	161
Chapter 18 Writing Job Search Cover Letters in English 英文求职信写作.....	172
Appendix An Introduction to English Punctuation 英文标点符号用法简介.....	181
Reference	191

Module 1

General Knowledge

秘书工作基本知识

Success is knowledge
of what you do not know
and how to learn it.

1

Chapter

Introduction to the Secretarial Profession

Learning Objectives

- ▶ The major role and tasks of a secretary
- ▶ The changing status of a secretary's role
- ▶ The personal qualities and skills required of a competent secretary
- ▶ The importance of forming a good working relationship with your boss
- ▶ The need to acquaint yourself with the business of your company

There is a common saying that reads as follows: "The secretary is the key person behind many a successful business manager." This remark embodies a great deal of truth. The secretary is quite often a VIP in a company. Therefore, it would be a big mistake to underestimate the role of the secretary. In this chapter, we will discuss what a corporate secretary should do, or, in other words, what role a secretary should play in a company. Through the study of this chapter, you will learn exactly what to expect before you "take the plunge" into this profession. Additionally, you will learn what qualities a secretary should possess to become successful in his or her work.



The major role and tasks of a secretary

The major role of a secretary is to provide assistance to a manager or managers. A manager is responsible for the success of an area/department of a company. As a result, his job duties are multifaceted. Since the manager is only one person with a limited amount of time, he needs

assistance in many areas within the scope of his responsibilities. Therefore, his secretary's scope of responsibilities and tasks are also multifaceted and cover a wide range and types of tasks.

The responsibilities and tasks of a secretary can include many varied duties such as:

- Research
- Typing
- Producing flyers
- Filing
- Dictaphone transcription
- Screening telephone calls
- Appointments
- Liaising with clients and staff members
- Attending meetings
- Taking minutes
- Translation
- Composing letters
- Making travel bookings
- Supervising
- Training staff (including your boss)
- Ordering flowers and gifts
- Etc.

The secretary's role is changing

The secretary's focus and responsibilities vary a bit from company to company, and change to a certain degree over time with the development of the company as well as the secretary's skill base and experience level. As the managers of the new generation are doing more and more of their own typing today, a secretary can expect to focus to a greater degree on organizing, supervising and training. In fact, a highly significant change is taking place in the name given to the "secretarial" position. Today, secretaries are becoming increasingly recognized as "office professionals". A secretary is no longer just someone who makes coffee and tea, sends faxes, makes copies and organizes files. The important role of a secretary positions this professional as the face of the company. The secretary is the initial point of contact for telephonic, online, paper, and face to face interactions. He or she is responsible for how the company is seen through many mediums.

Managers and executives rely on their office professionals for the organization and retrieval of information critical to the daily and long-term success of the company. High-performing, reliable secretaries that demonstrate professionalism and reliability may be promoted to the executive secretarial positions. In this capacity, they are responsible for certain managerial duties.

An executive secretary's duties include supervising other office secretaries or administrative staff. He/she often assists in personnel training and development, company activity scheduling, streamlining efforts, outsourcing choices and administration, and various other functions related to organizational management. In fact, in many companies today, secretaries have the title of "office

administrator”, so as to better reflect the varied nature and scope of the responsibilities of the position.

The skills and personal qualities required of a competent secretary

There are many skills and personal qualities required of competent secretaries. The following is a list of some of the most essential and foundational skills and qualities.

Skills:

- Ability to maintain an immaculate appearance
- Solid command of Mandarin and English
- Ability to communicate clearly
- Ability to type quickly and accurately
- Familiarity with office equipment and stationeries
- Ability to take instructions and carry them out under normal conditions
- Efficient organizational skills

Personal qualities:

- Awareness and possession of solid secretarial professional ethics
- Good sense of business etiquette
- Pleasant demeanor and personality
- Positive attitude
- Balanced emotional character
- Commitment to thorough and reliable performance

If a secretary possesses the above-listed skills and personal qualities, he/she would become a highly valuable person in the company. This secretary would have the ability to represent the company in a positive and professional manner externally to customers, partners, media, and other stakeholders. This secretary would also be an invaluable asset internally, efficiently handling responsibilities, organizing, and helping to maintain competent work functioning, clear communication and a positive climate of teamwork amongst the staff at all levels within the company.

Personal qualities, much like specific skills, can be developed and improved upon through time. As you continue to learn and develop in this exciting and changing professional field, be sure to continually



assess your current state of functioning and set goals for continuous personal improvement. Consult with your supervisor for feedback on your performance and make a professional development plan that outlines goals for your improvement, and ultimately your advancement in the company.

Form a good working relationship with your boss

To be a competent secretary, you will need to learn how your boss works. It is important that you understand:

- What his or her roles and objectives are within the company;
- What correspondence, telephone and personal inquiries he or she would like you to refer to him or her;
- Times of the day he or she prefers to take his or her calls.

Knowing these sorts of things will make your job easier. The goal is to save your manager time with the daily routine matters and be as helpful as you possibly can.

Acquaint yourself with the business of your company

As you learn more about the way your company operates and the role of other company personnel, you will find yourself capable of answering more and more routine inquiries and confidently and efficiently referring inquiries that require a managerial reply to the correct manager. This demonstrates that you are advancing in your knowledge, competence, and potential to contribute to the success of the company.

As a secretary, you should familiarize yourself with company policies so that you know how to deal with issues as they arise in your role as a secretary. For instance, should personnel complaints be put in writing, or will your boss deal with them verbally? You need to become familiar with many of these types of questions so that you will not waste the time of your boss by putting unnecessary calls through to him or her. If you are familiar with company policies, you will be able to handle many inquiries yourself because the company policies provide guidelines necessary for giving responses to such inquiries and for making decisions.

Many companies have procedural books and/or staff handbooks. Ask if there is one. If yes, then study it. If there is not one, offer to develop one as you learn the job. Your supervisor will be impressed with your self-motivated initiative. You will also find this document very handy when you need to train other staff that you supervise later.

Conclusion

The secretarial role is interesting, challenging and undergoing many changes. These changes have made the secretarial profession even more appealing. Today, secretaries are becoming more important than they have ever been before. They are no longer low-rank employees. Rather, they have become employees that are highly influential and integral to the success of the company.

The major role of a secretary is to assist a manager or managers. A secretary who fails to keep a good working relationship with the boss cannot optimally serve the company. It is also necessary for a secretary to keep trying to familiarize himself/herself with the policies and business of the company. In this way, he/she will make daily progress in his/her career.

Men and women throughout the world are enjoying a career in the secretarial profession. Let today be the day you, too, start training and planning for your future career.

New words & expressions

scope *n.* 范围

acquaint *vt.* 使熟悉

saying *n.* 俗话

embody *vt.* 包含

VIP *abbr.* very important person 重要人物

corporate *adj.* 公司的

multifaceted *adj.* 多方面的

flyer *n.* 宣传页

filing *n.* 文件归档

dictaphone *n.* (供速记员用的) 口述录音机

transcription *n.* 转录

liaise *vi.* 建立 (保持) 联系

retrieval *n.* 检索 (信息)

high-performing *adj.* 高效能的

managerial *adj.* 管理的

streamlining *adj.* 提高效率的

outsourcing *n.* 外部采办

immaculate *adj.* 整洁的

ethics *n.* 道德规范

etiquette *n.* 礼节

demeanor *n.* 举止

asset *n.* 资源

personnel complaints (员工的) 个人投诉

verbally *adv.* 口头地

procedural *adj.* 程序的

self-motivated *adj.* 主动的

appealing *adj.* 吸引人的

influential *adj.* 有影响的

integral *adj.* 不可或缺的

Exercises



1. Summarize the changes that are occurring to the secretarial profession today.
2. Summarize the responsibilities and tasks of a modern-day secretary.
3. What is your impression of the secretarial profession in the modern world after reading this chapter? Is it significantly different from the impression you had before? If yes, please describe the differences.
4. Answer the following questions in your own words.
 - (1) What is the major role of a secretary?
 - (2) How can a person become a competent secretary?
 - (3) How can a secretary achieve high efficiency in work?
 - (4) What skills should a successful secretary possess and why?
 - (5) What personal qualities should a successful secretary possess and why?

2

Chapter

Fundamentals of Business Etiquette

Learning Objectives

- ▶ The good manners at employer receptions and cocktail parties
- ▶ Table manners at formal banquets
- ▶ Cell phone etiquette
- ▶ E-mail etiquette
- ▶ Some tips about use of makeup

The word “etiquette” denotes the forms of conduct prescribed in polite society. Simply stated, etiquette means “good manners”. When you are in the business world, you have to know the fundamentals of business etiquette. The importance of etiquette cannot be overstated because how you present yourself will have a huge impact on the level of success you will achieve. Companies tend to promote people who can represent a positive image to their various stakeholders, as well as pressman. Business etiquette is not only important to people in sales or marketing circles. When you work in a business firm as an office professional or a secretary, you are, like your colleagues in the sales or marketing departments, in the business world. You will have many opportunities to deal with the customers and stakeholders of your company. At these times, you will be representing the image and “face” of your company. In this chapter, we are going to discuss some of the most fundamental elements of business etiquette.



Employer receptions and cocktail parties

Your employer will periodically hold welcome receptions. At other times, such receptions

are organized to say farewell. These social functions provide an opportunity for the staff members to communicate in a more relaxed format. These socials tend to result in improved employee relations and lead to better collaboration and teamwork. Your company will also hold cocktail parties for your company's vested partners or important customers. At such receptions or parties, as a secretary, you are noticed by many eyes. Your behaviors and manners at these times will significantly influence your professional success or failure. The following are some general guidelines to help you improve your etiquette at such occasions.

1. General tips

- 1) Read the newspaper before you go to the reception or party so that you can appear knowledgeable of current events in the world.
- 2) Prepare a 30-second "informercial" to introduce yourself to people.
- 3) Bring your business cards.
- 4) Plan to arrive a few minutes earlier. Give yourself time to go to the washroom first to repair any "damage" to your appearance caused by the weather.
- 5) Approach people standing alone or gradually ease into a larger group. Avoid breaking into groups of two as these are usually more personal discussions.

2. Introducing yourself

- 1) When introducing yourself to people, use your prepared self-introduction. Make good eye contact, smile, raise your eyebrows and extend your right hand. Try to match the firmness of the other person's handshake.
- 2) Practice confident, open body language.
- 3) When introducing others, mention the most important person's name first.
- 4) If you forget someone's name, be honest and ask him or her to repeat it.
- 5) When talking to people, avoid controversial topics, for example, politics, religion, etc. Do not ask people questions about their private lives, unless they voluntarily begin to talk about their families or other private things. Stick to safe topics: weather, positive world news, food, hobbies, etc.
- 6) Allow 45–60 centimeters of comfort space around you when conversing with others.

3. Food and drink

- 1) Hold drinks in your left hand; keep your right hand free to shake hands with those you greet.