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Professional Office Procedures

Scriven Kozoll Myers Hapke



Professional Office Procedures

Jolene D. Scriven, Ed.D.
Director of the Doctoral Program,
College of Business
Associate Professor of Management
Northern Illinois University

Charles E. Kozoll, Ph.D.
Professor of Education and Associate Director,
Continuing Education and Public Service
University of Illinois at Urbana-Champaign

Judith K. Myers, M.S., C.P.S.
Consultant, Private Industry

Gail L. Hapke, M.A.
Editorial Consultant

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INTRODUCTION

“My assistant is a true professional! Nothing leaves our office unless it has been rechecked and is totally correct.”

“You handled the arrangements for the annual meeting magnificently. I particularly appreciated the way you managed those two unanticipated crises.”

“Could you take on this special report? It’s very important to the company, but we’re convinced that you can do a superb job!”

“Thanks so much for helping to resolve the disagreement between the other two secretaries. Your diplomacy and compromise solution were exactly what we needed!”

“We appreciate your extra hard work in mastering the new word-processing system. Your suggestions for programs to be developed were wonderful!”

Each of these well-deserved compliments focuses on a different aspect of a single office professional’s responsibilities. That person is praised as a “professional,” one who takes pride in consistent excellence, one who overlooks not a single detail. The office professionals described in this textbook are self-motivated, diplomatic, precise, cool under pressure, and confident of their ability to perform a myriad of diverse and demanding tasks.

Regardless of title and size of organization, your colleagues contribute each day to the achievements, productivity, and overall success of their employers. By way of emphasizing that point, each chapter begins with a brief example of how an office professional’s knowledge, skill, and ability solved a problem, provided valued assistance, or identified a new approach.

This textbook describes how you can demonstrate your professionalism—and richly deserve such compliments yourself. In it you will find information, procedures, and suggestions that will increase your knowledge and skill in all areas of office responsibility and help you build a more positive attitude and develop greater enthusiasm for your work.

As you know, computer-based technology has affected our lives in significant ways. It is highly probable that, as a computer-age professional, your work will be made easier by equipment that integrates word processing, filing and financial management functions, and many other applications. You will be better able to complete such traditional duties as arranging meetings, scheduling appointments, and planning trips. In this text, you will learn to benefit from computers in all phases of your work—and you will learn what technological innovations to expect in the future.

While we emphasize the importance of technology, we haven’t forgotten about the important role human relations will play in your success. We will suggest ways to develop effective working relationships with one or more managers, establish a pleasant office environment, handle problems among co-workers, and cultivate your own potential leadership roles.

We begin the text by looking at the history of your profession: how technology is affecting it, where positions can be found, and what duties your position will entail. We will then examine the necessary attributes of an office professional and how technology can contribute to your productivity, before addressing the specifics of your varied and often challenging responsibilities.

Through our research preparing this textbook, we have learned how much managers and others depend upon office professionals. Equally important, we now realize how many opportunities for growth exist.

Every position is a unique one, depending upon the organization, manager, and, of course, the person occupying it. By blending the information, procedures, and suggestions in this text, you will be able to build a solid foundation on which to base your professionalism. With knowledge, skill, and a positive attitude, you will experience many successes and know the satisfaction that results from consistent excellence.

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Professional Office Procedures



UNIT

1

UNDERSTANDING YOUR PROFESSION

**CHAPTER 1: RECOGNIZING YOUR OPPORTUNITIES AS AN
OFFICE PROFESSIONAL**

CHAPTER 2: USING TECHNOLOGY TO MANAGE YOUR WORK

CHAPTER 3: ORGANIZING FOR PRODUCTIVITY



CHAPTER

1

RECOGNIZING YOUR OPPORTUNITIES AS AN OFFICE PROFESSIONAL

Chapter Objectives

- To learn how the responsibilities of an office professional have developed and changed over the years (circa 1870–present)
 - To understand the importance of exhibiting the following professional qualities: a positive attitude, loyalty to the organization, diplomacy, and problem-solving skills
 - To develop the ability to make decisions; knowing when to ask for help and when to “do it yourself”
 - To understand how your personal appearance (as well as your work area) makes a statement about you
 - To understand that although it takes time to become a professional, you can learn a great deal by observing others and learning from their criticism/suggestions
-

Examples of Excellence

Lauren Gomez had worked for a large bank for more than a year. Then she decided she would find greater opportunity in a small firm. When she joined Electronic Optics as assistant to the president, Lauren took on major responsibilities, including assisting the vice presidents and controller. She supervised the receptionist in her duties as telephone operator and shipping clerk. Finally, she hired and supervised temporary office workers.

At Electronic Optics, which manufactures scientific equipment, Mondays and Fridays tended to be the most hectic days. Lauren had learned to expect the unexpected on those days. One Monday morning, when Lauren had to make several copies of a major proposal, the primary office copier began chewing up paper, then stopped running altogether. Lauren quickly put up the “out of order” sign. Returning to her desk, she pushed a speed dial number on her telephone console to contact the copier service office for repair. Then she found a quick-copy outlet. She asked the mail clerk to take the proposal over there, then called the copier shop to ask for a rush job.

The next call was from the executive assistant to the president of a company that was a major client. “Lauren, my boss has to make an emergency trip to Canada next week and wants to see E Optics’ plans for the new microanalyzer *before* she goes. Can your manager make the presentation this Friday in our office instead of next Wednesday?”

"I'll check and get back to you by 2 PM," Lauren promised. She made quick notes of what had to be done and started making calls.

First, Lauren got her manager's approval to work on the scheduling change and reviewed for him what had to be done. "Go ahead and leave a note on my computer of what the new plans are," the manager said. Then Lauren contacted a travel agent to make the flight and hotel reservations. Next, Lauren asked the marketing vice president whether one of his part-time employees could help with the preparation of a group of overhead transparencies. Copying and preparation of written material were delegated to an outside service, with the receptionist in charge.

Lauren kept a record of all the requests and underlined her promise to call back the customer in the early afternoon. She put that information in her daily "to do" file.

While sorting out this assignment, Lauren took a call from a supplier who was anxiously awaiting a large check. "Lauren, I need that money to buy some priority equipment! Can you help me out?"

"Bob, this has been a terrible day! I'll try to track down the check and call you back before 5 PM. But that's not a guarantee!" She called the controller and asked his assistant to let her know about the check. This note also went into her "to do" file.

Although Lauren concentrated on the upcoming presentation, she found time to check the task list she had made the previous Friday. Given how fast the day was moving, she picked out three tasks that had to be done before the close of business on Monday.

The first task was to make sure the board had the financial report a week before their next meeting. The second, given her by the president and controller, was to track down an employee who had made several unauthorized long-distance calls. The third was to fill out a lengthy form for a government agency that would certify Electronic Optics to bid on certain projects. Lauren hid out in her manager's office to work on the form without interruption—to "get it right the first time." She had finished only one page when a call came from another customer regarding the whereabouts of a promised replacement part for an expensive piece of equipment.

With a number of jobs uncompleted, Lauren left the office at 1 PM for a quick lunch. Her personal life had priority too. Except on the most hectic days, Lauren would leave her office around noon and find an empty office to sit in quietly for a few minutes to regroup and slow down.

Lauren split the remainder of that afternoon between following up on work assigned to others and handling her own assignments. She reviewed over fifty purchase orders and checks for signature by the controller and president. She updated the mail log and annotated several letters so that her manager could respond to them quickly. Most important, she found time to call back the first customer about the missing part, the second customer about the presentation, and the anxious vendor about the status of his check. So far, however, she had only written a note requesting information for the financial report and done nothing on the unauthorized phone call problem.

Although Lauren had spent the entire day working at full speed, not once had

she turned to her computer. The screen remained the same except for the blinking of a Q-mail icon, indicating unanswered messages. "But tomorrow the computer could consume my day!" she thought. "The only constant in my work here is the unexpected."

The numerous challenges of Lauren's job point out the variety of tasks office professionals are expected to handle and show why the success of companies depends on the competence and enthusiasm of their office staffs. Lauren's activities may change from day to day, but each day is equally full and complex.

Here is how Lauren's supervisor regards Lauren's work: "Lauren is committed to our success. No matter what the task, she approaches it with determination, energy, and attention to detail. I can pay more attention to running the company because she manages our central office so effectively."

The pattern to Lauren's success is clear: her ability to listen carefully, consistency in following up, understanding that memory alone can't be trusted, skill in organizing and time management, and steadiness under pressure. Finally, Lauren makes no demands of others that she doesn't make of herself.

You are unlikely to begin in a position comparable to Lauren's. Within a short time, however, you could be handling as many tasks as she does. Regardless of your position, you will likely spend many busy days dealing with a great deal of detail management.

The Office Profession through the Years

Ever since written records have been kept, office professionals have been indispensable to their managers. In earlier years, some were called **secretaries** because they were relied on to record and protect important secret information. Early definitions of that title emphasized confidentiality. Businesspeople, public officials, and military leaders depended on those who could keep and find letters, bills, records, and confidential information.

With the development of industry in the United States, offices have greatly increased in size and many people have been needed to prepare correspondence, pay bills, and keep employee records, among other tasks. For example, clear records are essential for tax and general financial reporting. Certain laws require that other information be collected, reported, and stored for possible future use. Further, lawsuits are very common today. A business can be sued for something it did or failed to do. Accurate preparation and careful filing of mail and telephone logs, correspondence, reports, and financial statements are therefore crucial activities.

Figure 1-1 highlights the development of the office work profession since 1870. Figure 1-2 chronicles some of the costs of running an office from the mid-1870s to the present (with a prediction for the next century).

Thus, you can see how complicated office operation has become. Regardless of the organization, a great deal must be done to buy, sell, produce, hire, dismiss, complain, respond, and complete. As an office professional, you can become more productive with intelligent use of technology, but the amount of work you will perform is not expected to decline.

Figure 1-1
Highlights in the office work profession in America.

- 1870 The number of female stenographers totaled seven.
- 1875 The earliest ad for female typists appeared in a New York newspaper: "Mere girls are now earning from \$10 to \$20 a week with the # 'Type-Writer.' #"
- 1888 *How to Succeed as a Stenographer or Typewriter* by Arthur M. Baker was published; it was written mainly to men.
- 1900 The census reported over 100,000 women working as secretaries, stenographers, and typists; other estimates reached 200,000.
- 1911 The Katherine Gibbs Secretarial School was founded. Its aim was to allow more women to enter the field.
- 1920 One million women had entered the business world as clerical workers. These jobs required a high school education.
- 1973 WE (Women Employed) was organized by 1,000 women in Chicago to monitor the enforcement of affirmative action regulations requiring companies with federal contracts to set goals and timetables for firing, training, and promoting women and minorities. They subsequently won \$500,000 in back pay for several hundred female employees. A new state rule banning the sale of discriminatory insurance policies followed.
- 1978 *Dun's Review* reported that secretaries changed jobs every eighteen months due to better offers.
- 1980 Working Women-National Association of Office Workers reached a membership of 10,000 in forty-five states.
- 1981 *The Wall Street Journal* reported that male secretaries were a rarity in the Midwest. A new national union local, District 925 (pronounced "nine to five") was organized.
- 1990 The U.S. Department of Labor predicted that the secretarial shortage will peak.



Library of Congress



Courtesy of Marketing Concepts Ltd.

Figure 1-2
Sample office costs and salaries.*

1874	Mark Twain bought a typewriter for \$25.
1878	A telephone guaranteed to work one mile cost \$3; a five-mile model cost \$5.
1892	"The Chicago" writing machine sold for \$35.
1906	A six-week shorthand course cost \$7; a beginning male stenographer's weekly salary was \$20.
1930-	
1953	The cost of preparing and mailing a typical business letter rose from \$.29 to \$1.70.
1955	Women's wages averaged 64 percent of men's in all jobs.
1960	The cost of preparing and mailing a business letter rose to \$1.83.
1961	One-third of almost 2,000 office managers surveyed reported that they always paid men more than women for the same job.
1964	Female clerks earned less than half of what male clerks earned.
1970	The cost of preparing and mailing a business letter rose to \$3.05.
1976	The salary of the assistant to the mayor of New York City was \$27,715.
1980	The cost of preparing and mailing a business letter rose to \$6.07. Secretaries in Washington, DC, earned \$243, 33 percent more than the national average; in Jackson, North Carolina, they earned 45 percent less than the average. Citibank reported using Mailmobile Robots, each of which replaced nine people.
1981	The average factory worker used \$25,000 of equipment on the job; the average office worker used \$2,900. Stenographers with the federal government started at \$26,951; private secretaries earned \$35,033.
1988	The cost of preparing and mailing a business letter rose to \$9.89.
1990	The cost of preparing and mailing a business letter rose to \$10.85.
2030	According to one book on predictions, a secretary will earn \$600,000 (but a cup of coffee will cost \$10).

*Figures for the costs of preparing and mailing correspondence courtesy of the Dartnell Corporation.

The Office Professional's Skills

A study by Professional Secretaries International (PSI) asked office professionals to rank fourteen tasks according to preference. Note that most respondents preferred the more demanding tasks and responsibilities:

1. Managing projects
2. Operating word processing equipment
3. Supervising people
4. Keeping financial records
5. Composing letters for executives
6. Making travel arrangements
7. Arranging and scheduling appointments and meetings
8. Typing
9. Taking shorthand/dictation
10. Answering and routing calls
11. Opening and sorting mail
12. Ordering equipment and supplies