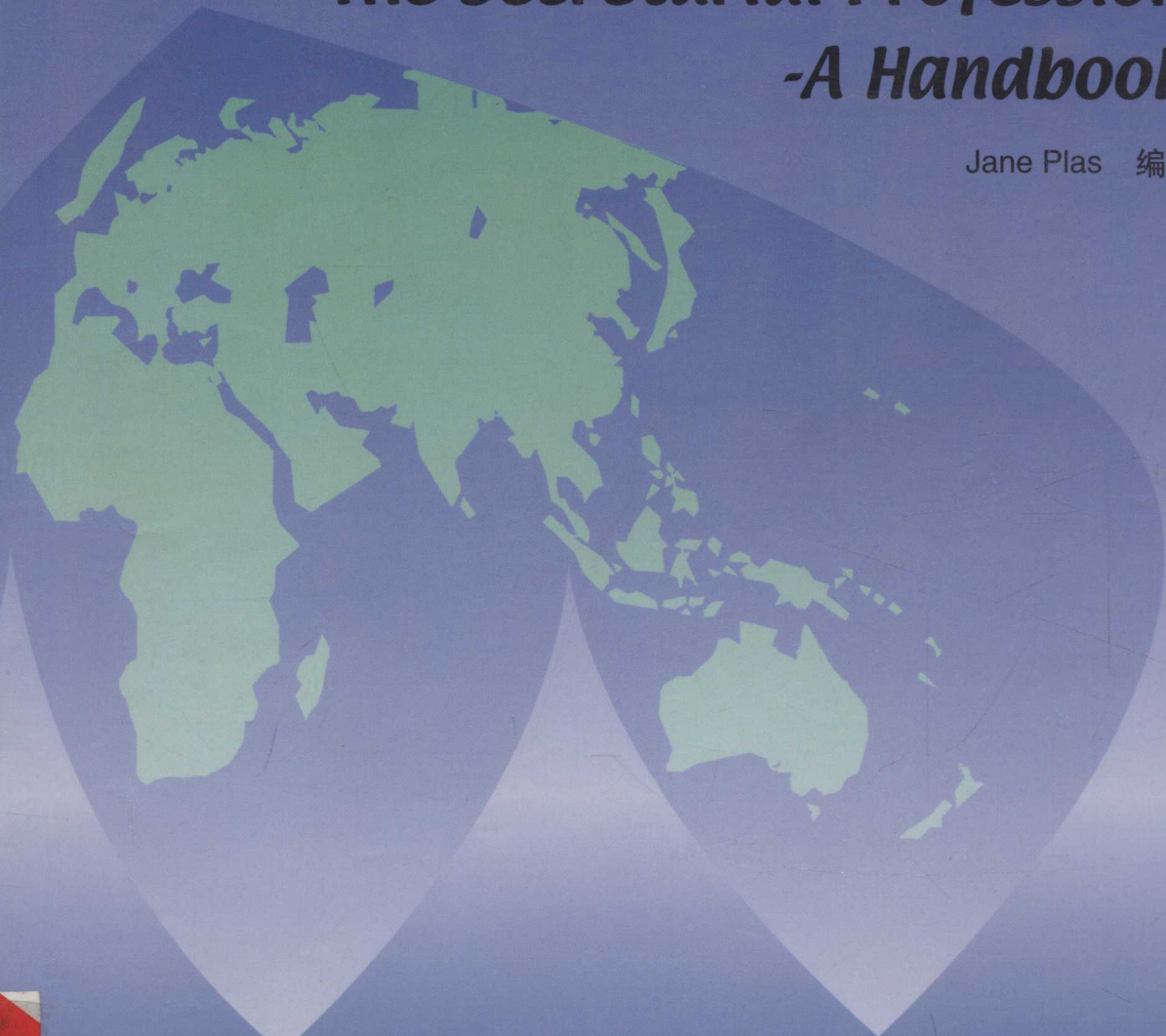


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# 实用英文秘书手册

*The Secretarial Profession  
-A Handbook*

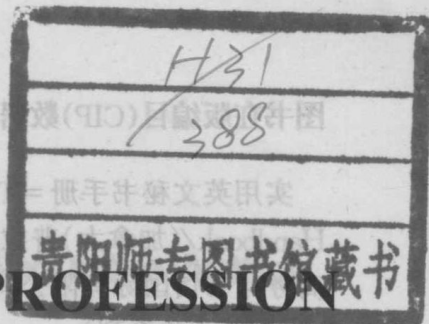
Jane Plas 编著



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# THE SECRETARIAL PROFESSION

## - A HANDBOOK

### 实用英文秘书手册

Jane Plas 编著

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The business career of the author extends over four countries - The Netherlands, Switzerland, Canada, and Mainland China. In Canada, she developed her long term career as a manager and senior executive, the last seven years as Director of Administration and Corporate Secretary with a major supplier of Canadian potash to export markets. She has also worked for a number of years as a Professor of Business English and International Business and Economics (IBSE), Beijing, China, under the auspices of Canpotex and China National Chemicals Import & Export Corporation (Sinochem). For a number of years prior to this assignment, she conducted management seminars on behalf of Sinochem at its Nan Dai He Training Center.

Before her final retirement in July 1997, she worked for one year as Senior Advisor, Training and Development, for Sinochem, continuing her Business English and Management training programs, and contributing her expertise to the Company's English language communication requirements. She then completed a further six month assignment with the Beijing Foreign Studies University (BFWU).

She now resides in Owen Sound, Canada, and maintains regular contact with many of her students. In addition, she continues her contribution to and interest in China through the Jane Plas International Bursary Fund, created to support Mainland Chinese students who wish to study at the University of Western Ontario, London, Canada.

Owen Sound, Canada  
1998

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The business career of the author extends over four countries – The Netherlands, Switzerland, Canada, and Mainland China. In Canada she developed her long term career as a manager and senior executive, the last seven years as Director of Administration and Corporate Secretary with Canpotex Limited, the world's largest supplier of Canadian potash to export markets. Beginning in 1993, she spent two years as a Professor of Business English and International Management at the University of International Business and Economics (UIBE), Beijing, China, under the auspices of Canpotex and China National Chemicals Import & Export Corporation (Sinochem). For a number of years prior to this assignment, she conducted management seminars on behalf of Sinochem at its Nan Dai He Training Centre.

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## 出版者前言

本书是由中国化工进出口总公司培训部前高级顾问,加拿大专家 Jane Plas 女士编写的,是一部全面阐述如何做一名合格的公司秘书的工作手册,也是 Jane Plas 女士以前在北美、近年来在华讲课时使用的培训教材。作者本人曾经在加拿大和美国的多家大企业以及一些跨国公司担任过多年秘书、培训主管和总经理助理等项职务,在现代企业的秘书工作方面积累了丰富的实践经验;后来,作者又亲自创办过数家秘书培训学校和一系列秘书培训班,近年又受聘来华工作了很长一段时期,从而在培训英语文秘人员——特别是英语为非母语的中国学员——方面也积累了丰富的教学经验,并且取得了很大的成功。

本书由三部分组成。上篇讲述秘书工作的性质、业务范围、发展前景、与经理层的关系等。中篇则全方位地讲授了秘书业务的各个领域以及工作要领的注意事项。下篇讲授秘书须负责代为起草或撰写的各类英文信函的写法。全书内容丰富,紧密结合实际,既可作为一种理论的学习,又可作为实践的指导。特别值得指出的是,作者在介绍一种西方,特别是北美的企业文化的同时,考虑了中国的具体情况,在一些例证中又以中国企业为背景。因此,对于在外国公司驻华代表处、三资企业或涉外业务的我国企事业单位中工作的文秘人员来说,这是一本不可多得的自修读本,也是可供随时翻阅参考的工作手册。

为便于读者学习和作为日常携带的参考用书,我们特将全书译成中文,分上、中、下篇,排在英文各篇之后。因此,对于那些有志于从事英语文秘工作的年轻读者来说,本书也将是一本可以无师自通的自我培训教材。

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1998年5月

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# THE SECRETARIAL PROFESSION PERSPECTIVE AND PROSPECT

## PART I

### The Essence of the Secretarial Function

with

### A Message to Management

and

### The Future for the Professional Secretary in China

The importance of learning about management cannot be over-emphasized, because until now a lack of knowledge in this area has been the dividing line between the professional secretary and the mere secretarial worker. Secretaries can perform as members of the management team only if they know something about management and how it functions. They need to know about authority and responsibility and the various types of leadership so that they can recognize the characteristics and adapt to them. They need to learn as well about the informal organization, i.e. the people behind the organization chart, so that they may become sensitive to human relations and human behaviour in the workplace. They must also learn about the management of time.

The task is both challenging and rewarding. Secretaries will have to be constantly aware of the ever changing scenery of the business environment. They will have to be ever receptive to the need for new skills, new administrative theory and approach to the job, and new performance.

The secretarial function thus complements the discipline of management and is vital





## THE SECRETARIAL PROFESSION PERSPECTIVE AND PROSPECT

If there was ever a need for competent secretaries in corporations and other organizations, that need is now. If there was ever a need for secretaries to become fully competent and play the supportive role that is their unique speciality, that need will never be more urgent than it is today.

In the 1990s there will be no shortage of lucrative and rewarding jobs. However, former skills will have to be upgraded and new skills will have to be developed. The secretarial function is one ideally suited to the new environment. Being a competent secretary has to do with being professional. Being a professional secretary requires, in addition to the usual technical skills, an understanding first of all of the confidential nature of the position, knowing what to say and what not to say; it requires a knowledge of management and managerial practices and, in our increasingly technologically oriented society, it requires computer operational skills. As importantly, however, it demands effective communication skills, both oral and written.

This handbook is intended to give secretaries and administrative assistants an opportunity to acquire an understanding of the scope of the position, to develop the required skills, and then to create within their organization an administrative support network that serves management in all its endeavours. A study of management is beyond the scope of this book. However, many excellent textbooks on administrative management are available in the English language and secretaries are encouraged to explore these resources and broaden their theoretical knowledge of the discipline of management.

The importance of learning about management cannot be over-emphasized, because until now a lack of knowledge in this area has been the missing link between the professional secretary and the mere secretarial worker. Secretaries can perform as members of the management team only if they *know* something about management and how it functions. They need to know about authority and responsibility and the various types of leadership so that they can recognize the characteristics and adapt to them. They need to learn as well about the informal organization, i. e. the people behind the organization chart, so that they may become sensitive to human relations and human behaviour in the workplace. They must also learn about the management of time.

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The secretarial function must complement the discipline of management and in that

complementary function, secretaries must make a major contribution to the goals and objectives of the organization that employs them. They must learn all there is to know about the company—its objectives, its corporate structure, and its products. Secretaries must come to provide a vital link between corporate plans and their implementation. In a very real sense, if performed well, the secretarial position should become the fulcrum without which management will be less effective than it might be.

In addition to relieving the boss of routine administrative duties and the carrying out of standard office procedures, secretaries must learn to exercise initiative and judgment. Like management, the secretary must plan, organize, and assume many administrative responsibilities in addition to, what today may seem like, trivial duties. Secretaries and boss (or bosses) must establish a working partnership which is of course a necessary element for any successful endeavour.

Managers must manage—that is what they are paid to do. Managers who handle detail and routine office procedures personally are spending their time in the wrong place. Executives or managers who perform their own secretarial duties, spend time at the copying or fax machine or are their own messenger boy or girl, are not spending their time wisely or productively.

### **Technical, Human, and Conceptual Skills**

Professional secretaries must have technical, human, and conceptual skills, the exact same skills prescribed for managers. For secretaries, what do they involve? The **technical part** of the secretarial function encompasses the following skills:

- a) technical skills, e. g. computer/word processor know-how.
- b) language skills.
- c) administrative skills.
- d) knowledge of organizational relationships relevant to the secretarial network, i. e. relationships to secretaries at the same level, the level below, and the level above on the organization chart.
- e) knowledge of managerial functions, authority relationships, and principles.

The **human part** of the job involves:

- a) an awareness of and sensitivity to human relations and human behaviour.
- b) adaptability and resourcefulness.
- c) knowledge of the self.

The **conceptual part** of the job reaches beyond the realism of the immediate job, relating as it does to reflective thinking and the world of ideas. It therefore involves:

- a) an understanding of the function and role the organization plays in the community and, increasingly, in the nation and the global economy; its relationship to other companies in the same industry.
- b) good judgment.



- c) an ability to make decisions that are relevant to one's work assignments and environment, i. e. an extension of the decisions made by management, focussing on detail, administration, and control.
- d) an ability to win respect from others.

### Intuition — Logic — Organizational Ability

Certain other qualities that are difficult to classify but that set the professional secretary apart from the mere secretarial worker are: **intuition** grounded in knowledge, **logic** which involves the art of reasoning, and **organizational ability** which enables the secretary to set priorities and complete assignments within designated deadlines.

These are a unique combination of qualities that are not easily evaluated in the world of work. They are not necessarily recognized as expertise, in spite of the fact that intuition works only as a result of a great deal of in-depth knowledge about the organization and the job. Logic and organizational ability as such are not measurable either — only the results are.

Whether these qualities therefore are rewarded in monetary terms or not, they *do* add immeasurably to a secretary's effectiveness.

These are the qualities that earn the secretary the confidence and respect of management. Once that confidence and respect has been earned, any barriers to recognition and progress that may have existed in the past will come tumbling down. Management will come to recognize that it simply cannot survive without effective secretarial support.

Also, from that day on the secretary **will** be working **with** rather than **for** management. She or he will have become a legitimate member of the management team.

For a glimpse at the multi-faceted role of the secretary, please read **A Message to Management** which follows on the next page.

\* \* \* \* \*

## A MESSAGE TO MANAGEMENT

This Handbook would not be complete if it did not include a special message to managers and executives. Secretarial professional development is one side of a two-sided coin. The other side involves management and its recognition of secretarial potential. Female secretaries are not handmaidens; male secretaries are not office boys. Neither are they mere *finger technicians* who know how to operate a typewriter or word processor, a fax or copy machine. Competence in these areas is vital but it represents a very small component of the secretary's overall function in the organization.

In the following notes, therefore, we take a look at both sides of the desk: At the secretarial side, to give you a perspective on the scope of that function and an opportunity to evaluate your secretary's performance within those parameters; at the managerial side, to assess your own contribution to the interdependent relationship that must be nurtured if your office is to perform to maximum effectiveness.

### THE MULTI-FACETED ROLE OF THE SECRETARY

The role of the secretary in the managerial environment is unique—it is multi-faceted as the following description illustrates.

The secretary as *the meat in the sandwich* — The secretary is responsible to management or to professionals who are also managers. This interaction means working and getting along with secretaries to other management, both at the same and at higher and lower levels of the organization. Of all people in the company, secretaries face most of the burden of adaptation—they must influence by persuasion and must adapt to their environment where they cannot.

The secretary as *image maker* — Image in business involves attitude: How secretaries view others and how they view themselves. (How they view others is of course very much a function of how they view themselves.) As an image maker, secretaries need to know what contribution they are expected to make to the department and to the company as a whole.

The secretary as *bridge* — The secretary is often the bridge between the boss, the department or company and the world outside, i. e. its *first impression*. What kind of impression does your secretary make? How do people regard you and the company after they have met him or her? Do they feel better or worse for having met your secretary? Can you always count on your secretary's support and discretion in difficult situations? Are you confident that she or he will use good judgment by bringing errors or omissions to your attention-quietly-without waving a red flag and without falling into the trap of being a tattle-tale?

As a bridge, does your secretary smooth ruffled feathers and pour oil on troubled waters? You have a right to expect that he or she does not contribute to a *threatening storm* in the office. In other words, secretaries need to learn to help solve problems, not contribute to creating them. They must be ever vigilant against

displays of temper or frazzlement when the chips are down, lest you and your managerial colleagues begin to question their maturity and self-control.

The secretary as *pivot* — The secretary's central role requires reliability and dependability. If secretaries suddenly become ill each time *the going gets rough* or the workload becomes unmanageable, you are allowed to ask whether that illness is real or merely psychosomatic and a symptom of an underlying deeper problem, i. e. the secretary's inability or unwillingness to cope and to face reality, resorting to defense mechanisms instead.

The role of pivot is particularly critical as it sometimes tempts secretaries to develop a sense of self-importance. Secretaries have to remember that they have no authority, except that conferred on them as a result of their competence, cooperative attitude, and willingness to work with others. No authority is conferred on them on the basis of the organizational hierarchy. Secretaries act on behalf of the boss. They do not *become* the boss. Any secretary who cannot accept this lack of real authority needs to be reminded of the conventional organization chart and how the secretarial job relates to the various managerial positions. The secretarial position may be and usually is clearly identified by the usual box leading from the superior's position to hers or his. However, there are no lines either ascending to or descending from that position in relation to any other function in the corporation.

The secretary's position is in a very real sense a staff position — a siding along the main track. It is a supportive role with direct responsibility to the superior and an opportunity to work with all those who have a working relationship with that superior.

The other dimension of this characteristic is the secretary/secretary relationship, which again has to do with authority. One of the most contentious issues in the relationship between and among secretaries is the question of authority. Secretaries who have been with a company or organization for many years, having gradually worked their way to the top, tend to assume authority and power by virtue of the position of the boss. They *lord it over* less senior secretaries or those who work for men or women in positions lower on the organizational pyramid. One typical complaint on the part of those affected by this behaviour is the habit of by-passing the secretary and communicating direct with subordinate managers.

Such action creates a number of problems: It undermines all secretarial functions in the company, and it uses unnecessarily a manager's time. It also creates low morale on the part of the by-passed *victims*, and of course it makes it very difficult for this secretary to remain informed on her or his superior's activities. In other words, this secretary then loses control. If all secretarial administrators in a company are to be effective performers, they must all participate in the setting up and careful nurturing of a secretarial network of information (sometimes referred to as the *para-hierarchy*), quite independent of the relationship between secretary and immediate superior(s).

One other aspect of the secretary's pivotal role is the need to exercise initiative. Secretaries, however, have to be very careful when questioning management's instructions. Before doing so, they need to be certain of their ground and they need to be able to justify their questioning. They can only be certain of their ground if they are well informed about the company's operations, its authority relationships, and the human interaction in the interpersonal underworld.

There are many occasions when management may be or is in effect wrong and would



benefit from a secretary's initiative in questioning orders. However, the secretary must never forget that she or he may not be aware of the background to instructions nor of underlying senior management policy decisions. Secretaries need to be aware that misplaced initiative, as a result of ignorance, is a major weakness and it gives management the right to doubt his or her judgment. The question arising inevitably is of course why secretaries are not informed, a matter dealt with when we look at the manager's side of the desk. Perhaps one of the most critical aspects of the secretarial position is judgment, a secretary's discretionary approach to office situations, problems, and their understanding of the meaning of confidentiality.

The secretary as **counsellor** — Secretaries also need to recognize their responsibility with regard to the training and development of those who may follow in their footsteps. They should never lose sight of the fact that by helping others to grow, they grow themselves. Serving the boss includes making provision for replacement staff during a secretary's absence. Secretaries are responsible for training such replacement staff; they must minimize the *ripples* when they vacate their desks. There is no such thing as being indispensable. If your secretary is absent and, as a result, the work environment and the desk promptly turn into chaos, he or she has failed in his or her responsibility to train a replacement.

The secretary as **administrator** — The secretary's role as administrator is manifold in that it involves not only the administration of their own office but also their interaction with others to allow them to function effectively. Managers and executives like you spend a great deal of office time attending meetings (both informal and formal) and they have to cope with many interruptions every day. The secretary has some responsibility to try to reduce such interruptions to a minimum by carefully and delicately balancing the boss's needs for desk time and subordinates' needs for information and consultation. This balancing act is one of the most difficult since particularly subordinates are easily offended when a secretary sets the boss's commitment schedules and tries to protect his or her desk time.

You will be interested to know the variety of ways in which such scheduling can be done effectively because it requires your cooperation. Secretaries can suggest that the subordinate leave the message with them so that they can do the necessary background research, if such is required, thereby saving both the subordinate manager's but also your time. Sometimes it may be appropriate to suggest that the subordinate check in advance as to your availability to avoid any unnecessary trips to your office and finding the door closed for a different meeting or engagement.

Under all circumstances, the secretary needs to determine the boss's work habits and wishes: Do you invite the interruptions, always ready to see anyone at any time, or would you prefer your office time were monitored provided it is done in a diplomatic manner. Secretaries must always beware that they do not become *tigers at the gate*, because this approach will ultimately reflect directly on you as the boss and may be interpreted as lack of your accessibility to those who need your advice or guidance, or who have matters of importance to discuss.

The final dimension of the secretary as administrator has to do with his or her years *in the trenches* and what those years have taught them about the realities of the working world, the boss or bosses and about organizational relationships. Secretaries know about what is commonly referred to as *office politics*. They have a ringside seat in observing these complex relations between and among people in the office: Who defers to whom. This kind of experience enables the secretary to exercise invaluable