



# 1

## Chapter

### Introduction to the Secretarial Profession

#### ***Learning Objectives***

After reading this chapter, you should know:

- ▶ the major role and tasks of a secretary
- ▶ the changing role of a secretary
- ▶ the skills and personal qualities 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 their 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 a business area or a department of a company. As a result, their job duties are multifaceted. Since the manager is only one person with a limited amount of time, they



need assistance in many areas within the scope of their responsibilities. Therefore, the 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 members
- Ordering flowers and gifts

**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 and experience. 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 telephone, online, paper, and face to face interactions. They are responsible for how the company is seen through many media.

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. 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. They often assist 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



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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 a competent secretary. The following is a list of some of the most essential and foundational skills and qualities.

#### **Skills:**

- Ability to maintain an immaculate appearance
- A solid command of languages
- 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
- A good sense of business etiquette
- Pleasant demeanor and personality
- A positive attitude
- Balanced emotional character
- Commitment to thorough and reliable performance

If a secretary possessed the above-listed skills and personal qualities, they 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 their roles and objectives are within the company;
- What correspondence, telephone and personal inquiries they would like you to refer to them;
- Times of the day they prefer to take their calls.

Knowing these sorts of things will make your job easier. The goal is to save your boss's 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 roles 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 making progress 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 them. 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,



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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 it is 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 themselves with the policies and business of the company. In this way, they will make daily progress in their career.

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

### New words & expressions

acquaint *vt.* 使熟悉

saying *n.* 谚语, 习语

embody *vt.* 包含

VIP *n.* 重要人物 (very important person)

corporate *adj.* 公司的

multifaceted *adj.* 多方面的

scope *n.* 范围

varied *adj.* 各种各样的

flyer *n.* (广告) 传单

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

compose *v.* [正式] 写 (讲稿等)

retrieval *n.* 检索 (信息)

in this capacity 以这个身份

managerial *adj.* 管理的

streamline *vt.* 简化……使效率更高

outsourcing *n.* 外部采办

immaculate *adj.* 整洁的

stationery *n.* 文具

ethics *n.* 道德规范



etiquette *n.* 礼节

demeanor *n.* 举止

asset *n.* 有用的人

personnel complaint 关于员工的 (工作或行为的) 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.* 有影响力的

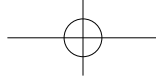
integral *adj.* 不可或缺的

optimally *adv.* 最佳地

## 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. Why are some secretaries today given the title of “office administrator”?
4. What should a secretary do to maintain a good working relationship with their boss?
5. Among all the skills/personal qualities that a competent secretary should have, which do you think are the most important? Why do you think so?
6. Decide whether the following statements are true or false.
  - 1) A secretary should read the procedural book or staff handbook before starting to work, in order to be familiar with the company policies and regulations.
  - 2) The secretary’s responsibilities are the same in every company.
  - 3) To be fully responsible, a secretary should report to their boss about every correspondence and telephone call from customers or potential customers.
  - 4) An executive secretary is not only responsible for paperwork in the office, but also responsible for supervising other office secretaries and administrative staff.
  - 5) Secretaries will be called “office professionals” in the future, although they are not today.
  - 6) The nature and scope of the responsibilities of corporate secretaries have been varied from what they were many years ago.
  - 7) Patience is required of any corporate secretary because their job is uninteresting and without challenge.
  - 8) For a secretary, keeping a good working relationship with the boss is necessary.



# 2

## Chapter

### Fundamentals of Business Etiquette

#### *Learning Objectives*

After reading this chapter, you should know:

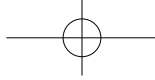
- ▶ good manners at employer receptions and cocktail parties
- ▶ table manners at formal banquets
- ▶ cell phone etiquette
- ▶ e-mail etiquette
- ▶ some tips about use of makeup

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 pressmen. 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.



#### **Good manners at 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 behavior and manners at these times will significantly influence your professional development. The following are some general guidelines to help you improve your etiquette at such occasions.

### 1. General tips

- 1) Read the newspaper or the news on the Internet before you go to the reception or party so that you can appear knowledgeable about current events in the world.
- 2) Prepare a 30-second "infomercial" to introduce yourself to people.
- 3) Bring your business cards.
- 4) 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 them 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 a drink in your left hand and keep your right hand free to shake hands with those you greet.





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- 2) Eat something before you go. Don't overeat at the reception or cocktail party—it is not really to be used as your meal.
- 3) Avoid alcohol, or limit yourself to one alcoholic drink. You need to be in top form.
- 4) Eat only non-messy, easy-to-eat hors d'oeuvres.

### Table manners at formal banquets

Dining etiquette is very important for a secretary. The way you eat will affect other people's impressions of you. The following are guidelines for table manners at formal banquets.

#### 1. Napkin usage

- 1) Place your napkin on your lap as soon as you sit down by the dining table.
- 2) If you have to leave the table during the meal, leave your napkin on your chair or to the right of your plate.
- 3) Never tuck your napkin into your collar.
- 4) Do not refold your used napkin when you are finished with your meal.
- 5) Do not use your napkin to wipe your face or nose. Use it to gently dab at your mouth.



#### 2. Ordering

- 1) If you are acting as a host, it would be polite to ask your guests to order food. However, for most formal banquets, food courses should be ordered beforehand. If you are a guest, then wait for the host to order, unless they direct you to go first.
- 2) If you are a guest and asked by the host to order, do not order the most expensive item on the menu. In any case, at a formal meal, it is advisable to stay away from messy foods, such as shellfish.
- 3) If you are a guest, do not order alcohol unless your host does. Never order more than one. If you are a host, check with your guests as to what type of alcoholic drinks they would like to consume.

#### 3. Use of utensils

- 1) If forks and knives are used during the meal, the "rest" position for your utensils is roughly



like an X on your plate, with the fork tines pointing down. This tells the waiter that you are not finished.

- 2) When you have finished eating, place them side by side pointing approximately to the 10 o'clock position.
- 3) To cut steak, hold the knife in your right hand and the fork in your left hand. Place the prongs of the fork down into the meat. Place the knife blade beside the prongs of the fork and slide the blade back and forth across the meat, cutting downward into the meat.
- 4) Used utensils should never touch the table.

#### 4. Passing food items

- 1) Always pass the salt and pepper together, even if only one is requested.
- 2) If you are asked to pass something, for example, salt and pepper, or rolls, don't use it or take some first before passing, unless the person requesting it invites you to.
- 3) Pass items in a counter-clockwise direction, that is, to the right.

#### 5. Eating

- 1) Spoon your soup away from you. Quietly sip from the side of the spoon.
- 2) If the soup is too hot, wait for it to cool before eating. Don't blow on it.
- 3) Break off small pieces of bread and butter and eat a piece at a time.
- 4) When eating meat, cut and eat one piece at a time.
- 5) Chew quietly with mouth closed. Don't talk with your mouth full.
- 6) Keep your elbows off the table when eating. You may rest your forearms on the table, although it is best to keep one hand on your lap, except when cutting up food.
- 7) Bring food to mouth rather than mouth to food. Do not bring your head down to the table when eating.

#### 6. Other tips

- 1) Don't apply makeup at the table.
- 2) Don't use a toothpick to clean your teeth.
- 3) Don't blow your nose at the table. Quietly excuse yourself and go to the washroom.
- 4) Turn your head and cover your mouth when you sneeze or cough.
- 5) If someone else sneezes, say "bless you".
- 6) Don't leave your personal belongings on the table.



## Cell phone etiquette

In today's China, the cell phone is a very commonly used telecommunications tool. The way you use your cell phone affects your image. As a professional, a corporate secretary should know appropriate business etiquette related to the use of a cell phone.

First, you should limit the use of your cell phone to only emergency calls when you are with others. This is especially important when you are in a meeting or at a presentation. Normally, in such situations, you should set your cell phone to the “vibrate” mode. In an important meeting, it is advisable that you simply turn your cell phone off.

If you are expecting an important call while attending a meeting, you can leave your cell phone on, but set it to the “vibrate” mode. Then, when the call you are expecting comes in, it is more appropriate that you leave the room to take the call. You should also apologize to the group before you leave the room.

While attending a meeting, you should not frequently check the WeChat messages on your cell phone, nor should you frequently send WeChat messages, otherwise other attendants would have an impression that you are absent-minded.

Cell phones may contain a lot of private or confidential information such as text messages and phone numbers. Many cell phones today work like a notebook computer, which allows people to save a lot of information and even make payments. For these reasons, business people normally would not welcome other people to use their cell phones. Therefore, it is best to avoid asking to use another person's cell phone.

## E-mail etiquette

E-mail is amongst the most important communications tools in business today. E-mail is popular because it is quick and convenient, and typically concise and pertinent. E-mail also creates a conveniently stored written record of what was communicated, thereby acting as a memory aid for organizational tasks. It also serves as a fact verifying tool, for times when disagreements arise as to what information was related, and when. The following are some suggestions regarding appropriate e-mail etiquette.

- 1) Be aware of and respect people's time. Keep messages brief.
- 2) Minimize e-mail-specific language, for example, BTW (by the way), :=) (I'm happy), lol (laugh out loud), u (you), r (are). Use proper English spelling and grammar.



- 3) Always include a subject line to make it easy for recipients to determine the priority level of the message.
- 4) Include an appropriate amount of the original message in your reply. You should not include too much, but enough for the recipient to recall the original idea.
- 5) Minimize chain letters, jokes and other personal e-mails.
- 6) Praises should be given publicly, whereas critical suggestions and feedback are best given individually.

### Use of makeup (women only)

Makeup enhances a professional lady's skin tones and helps her to present a more pleasant appearance. However, the goal is to wear makeup without looking overly made up. The following are a number of pointers to remember related to makeup.

- 1) Don't touch up your makeup in a business setting. Go to the rest room to reapply makeup.
- 2) Fingernails of a corporate secretary are best worn slightly longer than her fingertips. If you like, you can color your fingernails with clear polish.
- 3) A professional woman who wears nail color should have beautifully manicured nails and should check them daily for chips.
- 4) Lipstick prints on cups and glasses are unsightly. Therefore, lipstick should be blotted before a secretary goes out to eat.

### Conclusion

Business etiquette is the appropriate practice of polite and success-oriented behaviors in a business context. If a secretary wants to get promoted in a company, they must pay attention to business etiquette. This is because employers tend to promote those professionals who are more suitable to represent the corporate image. A secretary is a professional and should carry themselves as such. As there are many do's and don'ts for them to remember, they should start from the fundamentals of business etiquette as described in this chapter. They should remember the norms of behavior when they attend a reception, a cocktail party, a formal dinner or a banquet. They also need to be mindful of others when they talk on their cellphone, or send an e-mail out to a customer or colleague. Finally, they should have some understanding of what is considered graceful and ungraceful in terms of makeup.



**New words  
&  
expressions**

cocktail party 鸡尾酒会 (cocktail 为调了酒的果汁或其他饮料)

denote *vt.* 表示

polite society 文明社会

overstate *vt.* 夸大

impact *n.* 影响

stakeholder *n.* 利益相关者 (包括股东、客户、雇员、代理商、社区居民等)

social function 正式社交集会

social *adj.* 社交的 *n.* 联谊会

collaboration *n.* 合作

teamwork *n.* 团队合作

vested partner 既定的合作者

infomercial *n.* 专题广告片

ease into 轻松地进入

open body language 大方的身体语言

controversial *adj.* 有争议的

voluntarily *adv.* 自愿地

converse *vi.* 交谈

be in top form 处于最佳状态

non-messy *adj.* 不凌乱的

hors d'oeuvre *n.* (正餐前的) 开胃食品

napkin *n.* 餐巾

lap *n.* (处于坐姿的人) 从腰到膝盖的正面部位

tuck *vt.* 塞进

dab *v.* 轻擦

tine *n.* (叉、耙等的) 尖头

prong *n.* (叉子等的) 尖头

spoon soup away (从后往前地) 舀汤

sip *v.* 小口地喝

blow one's nose 擤鼻涕

vibrate *v.* 振动

advisable *adj.* 明智的

WeChat 微信

recipient *n.* 收件人

chain letter 连锁信 (要求收信人转发他人的信)

skin tone 皮肤色调

overly *adv.* 过度地

pointer *n.* 建议

touch up 补妆

clear polish 鲜亮的指甲油

manicure *vt.* 修整 (指甲)

chip *n.* 小缺口

unsightly *adj.* 不雅的

blot *vt.* 擦干

corporate image 企业形象

carry oneself 表现, 举止

do's and don'ts 该做的和不该做的事情

be mindful of 注意……的



## Exercises



**1. What should a secretary do to be prepared before going to an employer reception or a cocktail party organized by the company?**

**2. Decide whether the following statements are true or false.**

- 1) When dining in a Western-style restaurant, tear bread into bite-sized pieces and butter each piece before you eat it.
- 2) On business occasions, always shake hands very gently, offering only your fingers to the other person.
- 3) When passing items at the dinner table, you should normally pass them to the right.
- 4) Cut up all of your food at once so that you can concentrate on conversation at the table.
- 5) If you need to leave during a meal, tuck your napkin under your plate.
- 6) After the food is served, when someone at the table requests the salt, pass them only the salt.
- 7) If your coffee is too hot, blow on it to cool it down.
- 8) To temporarily stop eating during a course, place your knife and fork crossed like an X on the plate with the prongs pointing down.
- 9) When you and your boss eat with some customers, if your boss is talking to the customers and you are not talking, you can use a mirror to mend your makeup by the table.
- 10) The secretary of a company is often considered representing the image of the company.

**3. What behavior can be considered improper when a secretary is having a meal with customers?**

**4. Suppose you are acting as the purchasing manager of a toy company. You asked your supplier to send you a price catalog as well as the samples you mentioned in your last e-mail. Write an e-mail to your supplier with appropriate etiquette. In your e-mail, you should:**

- sum up the gist of your last e-mail;
- elaborate the importance of the role their product catalog and samples play in your process of making the final purchasing decision;
- urge your supplier to take quick action.

**5. What should you do when ordering food for a meal with customers who may have religious or vegetarian requirements for food?**