



**Master Consultants Ltd**  
Growing People, Growing Organizations

## **COURSE OUTLINE**

# **INTERNATIONAL DIPLOMA IN ADMINISTRATIVE/PERSONAL ASSISTANT & SECRETARIAL DUTIES**

Westcom Point, 2<sup>nd</sup> Floor, Mahiga Mairu Avenue, Westlands, Nairobi.  
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### **Module 1 - The Personal Assistant and the Private Secretary**

Why executives need assistance  
Types of assistants  
How PAs/private secretaries differ from other office personnel  
The PA/private secretary and her boss as working partners  
Complementing the executive:  
    overcoming any weaknesses  
Working with executives with differing characters, temperaments, etc  
Why every PA/secretarial post is unique  
Adapting to changing circumstances  
Differing measures of success in the PA/secretarial profession  
Personal attributes needed for PA/secretarial success:  
    appearance, personality, adaptability, mental agility,  
    physical attributes, good speech, good handwriting,  
    accuracy, sense of responsibility  
Action to take to acquire/develop necessary attributes  
Valuable secretarial skills:  
    typing, word processing, computer keyboard operation

### **Module 2 - PA/Secretarial Work-Environments**

Organizations which employ PAs/private secretaries:  
    the modern world of commerce:  
        the public sector and the private sector  
        industrial enterprises, trading enterprises, service enterprises,  
        the professions, non-profit making organizations  
Specialisation and the variety of activities  
The functions of the office:  
    its concern with information  
Centralised and decentralised offices:  
    clerical centres  
Office location and planning:  
    multi-room layout  
    open-plan layout  
Where a PA/private secretary might work:  
    considerations in accepting posts  
The avoidance of overcrowding in offices  
Minimising staff movement:  
    O & M studies  
Office lighting  
Ventilation, heating/cooling in offices  
Toilets and cloakrooms  
Supervision of different categories of office personnel  
The prevention of accidents in offices  
Health & safety policy  
Providing the right office environment:  
    walls and ceilings  
    floor coverings  
    lighting, ventilation and heating/cooling  
Office furniture and furnishings:  
    utility, cost, image, status symbols, standardisation  
Harmony amongst office personnel:

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causes of friction  
Office and secretarial desks and chairs:  
desirable features

### **Module 3 - Information, Records and Filing, Computer Systems**

PA/secretarial duties concerned with information

Sources of information:

- from within the organization
- external sources
- the Internet: websites

What records are and why they are maintained

Ways in which information might be recorded

Collating, analysing and presenting information in the required formats

Filing:

- what is involved, it aims

Filing systems:

- installing/evolving the most suitable system

Centralised filing:

- advantages and disadvantages

Filing schemes:

- alphabetic, numeric, geographic, chronological, subject matter

combinations

Cross referencing

Indexing

Record retention:

- microfilming and scanning
- storing computer records

Filing equipment:

- vertical filing and lateral filing

Loose card filing systems and visible card filing systems

Types of records:

- accounts, sales, stock/inventory, personnel, etc

Maintaining records by computer:

- characteristics of a computer system
- its primary function and role
- a computer system as an aid to management and administration
- computer hardware
- computer software - the programs:

- tailor-made, applications packages, database packages

database systems:

- shared data, avoiding duplication
- record and report design

the importance of good data

data security:

- backups copies of data
- security codes and passwords

data storage and deletion, the deletion policy

dead or inactive data:

- internal and external storage, deletion

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#### **Module 4 - Oral Communication, Forms and Business Documents**

Definition of communication:

the “parties”, ensuring common understanding

The importance of good communication in any enterprise:

the need for a two-way flow of communications

The purposes of internal communication:

to receive and provide needed information

to increase knowledge and understanding

to instigate action or influence behaviour

Oral communication:

advantages and dangers

emphasis, inflexion and tone

adaptability

Unspoken forms of communication or “body language”

When written communication is necessary

Communication by telephone and intercom

The principles of effective communication:

identifying the sender and receiver(s)

selecting the most appropriate communication channel

ensuring the same interpretation by the parties

provision for feedback

reversal of roles from sender to receiver, and vice versa

The many and varied uses of forms Factors to consider in designing a form:

the information really needed

sizes of spaces left for information

logical and coherent sequence

standardisation of layout

presentation

catering for filing

codes or references and serial numbers

copies of forms, indexes

Illustrations and descriptions of common forms and business documents:

order form, invoice, credit note, statement of account

cheque or check and counterfoil

pay-in/deposit/ lodgement slip and counterfoil

receipt for payment

petty cash voucher

delivery note, goods received note

Accuracy in completing forms

Series of forms

Comparison of manual and computer “completion” of forms

#### **Module 5 - Business Letters**

Why business letters are written

Ways in which business letters differ from personal letters:

the letterhead, the date, the addressee, the greeting, the message,

references, the closing expression, designation of the writer

A specimen business letter examined

Layouts of business letters:

indentation, justification, block layout

Action to enhance the appearance of business letters

Planning business letters:

making notes of topics

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Drafting:

- what is involved, advantages

Stock sentences and paragraphs

Notes or annotations:

- constructing letters from them, example
- annotation and drafting via computer
- remote access - VPM connection

Systems of shorthand and shortened writing

Giving dictation to stenographers:

- matters for dictators and stenographers to remember

Dictation directly to a typist or keyboard operator

Dictation into a machine:

- dictaphones
- matters for dictators to remember
- audio typists

## **6. Memoranda, Reports, Word Processing, Computer Mediated Communication**

Internal communication:

- vertical and horizontal
- organization charts, relationships

When memoranda should be used

How memoranda differ from business letters

Routine reports:

- gathering and compiling data

Special reports:

- aims
- essentials
- selecting the best styles and forms of presentation

Word processing:

- advantages of word processing
- standard features of WP software packages
- WP spell checker
- the WP Thesaurus
- predictive text
- learning to use word processing
- problems caused by different "packages" and updates

Personalising letters

Desktop publishing:

- facilities offered

Computer mediated communication

Uses of computer systems and electronic devices

- in business and management:

- effective management of information:

- aims and goals

Email:

- advantages over other methods
- avoiding potential problems with emails

email packages:

- standard features and facilities
- delays and delivery failures

Computer viruses

Antivirus software

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### **Module 7 - Meetings**

The PA's/private secretary's possible involvement with informal meetings  
Written confirmation and records of informal discussions, decisions and agreements reached in letters, memos and forms  
How a formal meeting differs from an informal one, role of the chairman  
Notices of meetings:  
    convening meetings, dates, times, venues  
Agendas of meetings:  
    why they are prepared and distributed  
Common topics listed on agendas for formal meetings:  
    apologies for absence, minutes of the previous meeting matters arising, specific matters for discussion or decisions, any other business  
PA/secretarial work in preparing and distributing notices and agendas  
Minutes of meetings:  
    why they are prepared  
How minutes might be written:  
    notes during a meeting  
    subsequent action, rules to observe, distribution of minutes  
Confidentiality  
Other possible PA/private secretarial duties prior to meetings  
Possible PA/private secretarial duties during meetings  
Conferences and conventions  
Meeting and event management:  
    purpose of the event, audience  
    venue/location and logistics

### **Module 8 - Incoming and Outgoing Mail**

How incoming mail may be received  
Centralised mail opening:  
    possible procedures  
    distribution of opened mail  
    supervision by an executive's PA/private secretary  
Practical example of actions by a PA/private secretary in dealing with:  
    incoming mail for her boss or his department:  
    personal and incorrectly delivered mail  
    removing contents of envelopes:  
        checking all information, marking date of receipt  
    sorting opened mail into categories:  
        processing different types  
        dealing with payments received  
Centralised despatch departments or postrooms:  
    despatch work  
Postage rates  
Methods of postal transmission: inland, overseas, surface, airmail  
Classifications of mail: sealed letters, printed matter, parcels, etc  
Special services: express mail, recorded delivery, registration  
The responsibilities of those despatching by post  
Choosing the most appropriate mode of despatch  
Why the correct value of postage must be affixed to every item  
Postage stamps: protection from loss and damage  
Franking machines, weighing and other mail-room equipment  
Despatch using courier services  
Preparing typed letters and documents for despatch:  
    features to check:  
        addressee's name and address, date, spelling and punctuation, figures, layout, typing and appearance, copies, enclosures, attachments  
The importance of checking and accuracy  
Envelopes: correct sizes, colours

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Packing ready for despatch

### **Module 9 - Reception Work, Visitors and Appointments**

The reception as the enterprise's show case

Reception furniture, fittings, decor, general appearance

Attributes of good receptionists:

- attractive appearance, amiability, patience and tact
- knowledge about the enterprise, product knowledge

The main types of reception work:

- welcoming and directing visitors
- supplying information
- maintaining records
- making appointments
- accepting deliveries
- holding items for collection
- security checks, ID cards, clip-on badges, CCTV

Making appointments for people to see an executive in his office:

- actions depending on whether he wants to see them or they want to see him: other personnel or outsiders

Using initiative in making appointments:

- full example

Avoiding making appointments

Handling visitors:

- visitors who have to wait
- visitors without appointments

Making appointments for an executive to see people at their premises: actions depending on whether they want to see him or he wants to see them other personnel or outsiders

Cancellation, postponement and rearrangement of appointments:

- why that can be unpleasant and disappointing for secretaries

The appointments book or diary:

- why it is used
- what information might be recorded in it

Making travel arrangements for an executive:

- booking modes of transport
- reservations at convenient and/or suitable hotels
- checking documentation needed preparing itineraries

### **Module 10 - Money Matters**

Resources available to enterprises

Manual and computerised bookkeeping/accounting

Principles of double-entry bookkeeping:

- why two entries are necessary for every transaction

The ledger: what it records

ledger accounts:

- the debit side of a ledger account: what it records
- the credit side of a ledger account: what it records
- manual and computerised ledger accounts compared

The cash book: what it records, why it is used

- its debit and credit sides, balancing

The sales book: what it records, why it is used

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The purchases book: what it records, why it is used  
The returns inwards and outwards books: what they record, why they are used  
The journal: what it records, why it is used  
Banking:  
    frequency, paying-in or deposit slips  
Issuing cheques:  
    the parties to a cheque transaction  
    features of cheques to be checked for accuracy  
Cheque security:  
    precautions against fraud and forgery  
    open cheques and the effect of crossing  
    special crossings  
Cashing cheques:  
    why that might be necessary, how it is done  
Checking bills:  
    the aim, what matters should be checked and why  
    passing and paying bills  
Petty cash: why and for what it is used  
The petty cash book with analysis columns  
The imprest system of petty cash: its advantages  
Ordering stationery items: by telephone, using an order form, by letter  
Ordering the printing of literature: reprints and new jobs  
Checking incoming deliveries  
Storing stationery: prevention of loss or damage  
    avoiding shortages and stockouts

### **Module 11 - Supervision of Office Personnel (1)**

What is involved in recruiting personnel:  
    how job "vacancies" might arise  
    ways in which a PA/private secretary might be involved  
Internal recruitment:  
    promotions and transfers  
    possible advantages  
    avoiding problems for newly promoted/transferred personnel  
External recruitment:  
    possible sources of personnel  
Introductions by existing personnel  
Job analysis: what is involved  
Job descriptions: what they may contain  
Employee specifications: attributes sought  
Advertising to fill vacancies:  
    specimen classified and display advertisements  
    seeking suitable applicants employment  
    application forms  
Employment interviews:  
    what they involve and their aims  
    planning and preparing for them  
    method of conduct for productive results  
    a PA/private secretary as an "interviewer"  
Selection tests  
Selecting a suitable candidate:  
    the letter of appointment  
Trial or probationary period:  
    its value to both employer and employee  
The importance and aims of a good employee induction process

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Stages in induction:

- what might be involved and who might be involved

Introduction to and integration into the workgroup:

- avoiding problems for newcomers to workgroups

On-the-job training:

- why it is necessary

- what it should involve and who might be involved:

  - experienced personnel, mentors

- simplifying the job into "tasks" for quicker learning

Benefits of ongoing training and job redesign:

- job rotation, job enlargement, job enrichment

### **Module 12 - Supervision of Office Personnel (2)**

The functions of management:

- planning, organising, co-ordinating, motivating, controlling  
organization structure, lines of communication

The PA/private secretary as office supervisor:

- carrying out the functions of management

Relations with other office personnel:

- subordinate staff: being understanding, impartiality,  
displaying interest, praise and encouragement

Setting good examples in attitudes, behaviour,

- work performance and output

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Workgroups and teams:

- a PA/private secretary as the office team leader building and maintaining an effective and cohesive team styles of leadership
- small and large workgroups, spans of control
- factors in cohesiveness, group norms

Maintaining discipline in the office:

- taking disciplinary action

Employee counselling:

- what it entails, benefits which can accrue from it
- work-related and personal problems

Harmony in the office:

- dealing with arguments and upsets

Unavoidable and avoidable resignations

Threats of resignation: responses

The departure of staff

Employers' references or recommendations

Paying salaries and wages: rates of pay, additions and deductions

- preparing pay-slips

### ***Preparing for Promotion to Supervisory and Managerial Posts***

The technical and managerial aspects of a management post

Opportunities for promotion:

- in office administration
- making use of experience gained in other management fields during a PA/private secretarial career
- within the same enterprise or in another

Steps in preparing for promotion:

- studies/training
- gaining practical experience

Qualities looked for by executives in people seeking promotion:

- willingness to learn and do more
- relations with other people
- ability to accept responsibility
- ability to handle and exercise authority in a mature manner
- trustworthiness and reliability

Suggestions for further studies

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