CERTIFICATE IN
EXECUTIVE SECRETARYSHIP

MODULE LEARNING GUIDE

FOR

PDW 1: GROOMING & TELEPHONE TECHNIQUES

SUBJECT CODE: CES 106

Version 1: JANUARY 2007

1) INTRODUCTION

This module is intended for secretarial students to familiarize themselves with the attributes of Professional Image on appropriate professional appearance, while understanding how to use correct manners and etiquette, appropriate personal behavior and using effective communication.

2) AIMS

The module is designed to cover the essential aspects, which are vital to the development of an executive image and style befitting of personal assistants, executive secretaries or office administrators.

3) LEARNING OUTCOMES

At the completion of this completion, lecturers must ensure the students will be able to:

- Understand the impact of grooming and its importance to well being and success.
- Know the way to enhance personal presentation through appropriate dressing, hair and nail care, use of accessories and apply the basic skin care and make-up techniques for different occasions.
- Identify tips on developing diets for a healthy lifestyle and incorporating exercise in one's daily routine.
- Understand and know the art of office and social etiquette.
- Learn the importance of communicating effectively in oral communication.
- Develop the confidence in handling telephone calls diplomatically and effectively.

4) AUDIENCE AND PRE-REQUISITES

The module is intended for students who have just started their secretarial programme.

5) OVERVIEW OF THE MODULE

This module will cover the following areas:

The concept of a Professional Image

Professional Image consists of personal appearance with regards to clothing, grooming, manners and etiquette, personal behavior, and communication effectiveness.

The main professional image includes:-

- Appropriate professional appearance
- Use of Correct manners and etiquette.
- Appropriate personal behavior.
- Effective communications.
- Clothing care and maintenance
- Appropriate styles for your individual body
- Types of functions you must attend
- Overall cleanliness and grooming
- Making introductions and appropriate greetings
- Being able to initiate and maintain conversations
- Respecting the customs of others
- Knowing appropriate dining rules and protocol
- Extending courteous behavior to others
- Knowing how to behave in difficult situations.

6) INSTRUCTIONAL PLAN and RESOURCES

The base source of material to be used is Professional Image – Author Ann A. Cooper.
Additional reference is to be made with

- Your Executive Image by Seitz
- Her World Magazine
- Women's Weekly

CLASS TEACHING SCHEDULE

Week	Lecture	Tutorial / Activities
1	**Introduction to Grooming:** **Professional Image** 1.1 Concept 1.2 Attributes 1.3 Importance and significance 1.4 Effects and self-confidence 1.5 Development	Unit 1 **Professional Image** - page 1 – 10 **Activity**: - Group discussion on Professional Images by Charade Game.
2	**Dress Sense**: **Professional Image** 2.1 Individual Body Attributes 2.2 Grooming and hairstyles 2.3 Nail Presentation 2.4 Make-up 2.5 Exercise and health habits 2.6 Nutrition	Unit 2 **Professional Image** - page 11 – 23 **Activity**: - Paste and Match Picture or by using Power point in group discussion on attributes towards good grooming.
3	**Professional Dress** 3.1 Professional dress defined 3.2 Significance of professional dress 3.3 Criteria for clothing selection 3.4 Professional dress for woman 3.5 Accessories for woman 3.6 Casual Business Dress & Special Occasion Business attire	Unit 3 **Professional Dress** – page 25- 37 Page 41 - 43 **Activity**: - Inviting a lecturer from fashion and Design School to give tips and comment on the pictures which has been provided by the students using power point slide.
4	**Wardrobe Management** 4.1 Individual Style 4.2 Wardrobe Assessment and Planning 4.3 Making Clothing Purchases 4.4 Ensuring a Proper Fit 4.5 Wardrobe Budgeting 4.6 Wardrobe Care **Practical – Deportment** 4.7 The proper way to walk with elegance 4.8 How to stand and sit with elegance Importance of gestures	Unit 4 **Wardrobe Management** – page 45 - 58 Visit to a Boutique for Wardrobe Management-Students are required to submit a report on the making clothing purchases and Wardrobe Care tips. Unit 4 Video presentation on cat walk and walking with elegance. Notes on good tips.
5	**Manners and Etiquette for the Professional** 5.1 Understanding requirements of behavior in the office. 5.2 Understanding proper table manners at social events.	Unit 5 Page – 75 -85 Page – 61 – 73 Activity:- Organise a talk on food dinning and correct setting cutlery
6	**Event Planning 1** 6.1 Types of event 6.2 Understand what to consider when	Unit 6 Additional notes from the lecturer and group

	planning events 6.3 Understand what are the considerations for event planning	discussion on the preparations.
7	**Event Planning II** 7.1 Using the guidelines required in event planning, plan the tea-party with details for:- Before, during and after the event	Unit 6 Additional notes from the lecturer and group discussion on the preparations.
8	**TEA-PARTY PRESENTATION** (to include Public Speaking presentation)	
9	**Receiving, making calls & Recommended Phrases For Telephone Users** 9.1 The procedures involved in Receiving and Making Calls 9.2 Courteous phrases which can be used to enhance the image of the company 9.3 Standard ways of answering the telephone **9.4** Common phrases for telephone users.	Unit 9 Additional Notes
10	**Do's and Don'ts for telephone users** 10.1 Techniques involved in handling calls 10.2 Use of a telephone message sheet. 10.3 Taking messages	Unit 10 Additional Notes
11	**Screening calls & Shielding employers** 11.1 How to screen calls 11.2 How to shield the employer from unnecessary calls and callers 11.3 How to express regret when the employer is unable to take the calls	Unit 11 Additional Notes
12	**Withholding confidential information tactfully** 12.1 Tactics available in handling callers who try to find out confidential 12.2 How to shield the employer from unwanted calls / callers 12.3 What excuses to give on behalf of the employer who does not wish to take a call 12.4 Passing of important and relevant calls to the employer.	Unit 12 Additional Notes
13	**Telephone calls dialog practice.** 13.1 Written Class Test 1	Unit 13 Activity: Pair students and create different event telephone calls covering telephone techniques.
14	**Telephone Techniques Final Presentation**	Individual Students will be placed in a room and will be test on answering incoming calls, receiving calls, transferring calls and taking message.

7) ASSESSMENT REQUIREMENTS

7.1 AIM

The aim of the assessment is to identify formal practices and procedures for assessing and appraising the performance of students in order that those judgments and decisions can be reached concerning:

- The progression of participants through the programme.
- How well participants have met the programme learning outcomes through the combination of the individual module learning outcomes.
- The provision of feedback information to participants concerning their performance and how they adhered to the generic assessment criteria and the module-specific assessment criteria.

7.2 ASSESSMENT INSTRUMENTS:

The following is an outline of the various assessment instruments for this module:

7.2.1 EXAMINATIONS (30%)

Final Examination is included in this module. It seeks to determine participants' individual effectiveness in responding to specific questions under time-constrained invigilated conditions. The examination may take this form:

*	Section A	-	Objective Questions	(20Q x 1%)	20 %
*	Section B	-	Short Answer Questions	(5Q x 2%)	10 %
*					
	Total				30 %

A closed book examination requesting participants to demonstrate their knowledge and critical analysis skills in responding to specific questions based over the said module.

Examinations test retained knowledge and understanding and the student's ability to address questions and problems under examination conditions and time constraints. This process simulates conditions under which managers invariably have to work - assessing what is needed, identifying options, establishing priorities, making decisions and communicating - all under pressure. Examinations also ensure that the student has to produce original work, which cannot benefit from outside help. The examination process is valued by employers as it assures them that students on the program are thoroughly assessed on their own merits and cannot achieve a pass based largely on the work of others.

7.2.2 INDIVIDUAL ASSIGNMENT (30%)

The assignment will be based on topics covered between weeks 1 and 5. Candidates are required to investigate and analyze a topic(s) to produce evidence that demonstrates an understanding and application of a range of specific learning outcomes.

- Telephone Techniques (10%x3Q) 30% (A) (Practical)
- Hosting a Tea Party (40%x1Q) 40% (B) (Practical)

A. TELEPHONE TECHNIQUES (PRACTICAL EVALUATION 30%)

Script - making a call	10%
Receiving a call and taking a message	10%
Practical Telephone Call	10%
Total	30%

Candidates are put on duty to handle the key telephone system at reception. They would be required to answer, transfer and make telephone calls for staff and would be evaluated on following areas:-

*	Correct form of greeting when answering the telephone	2 %
*	Ability to transfer and connect calls correctly to the recipient	2 %
*	Ability to record and deliver messages correctly	2 %
*	Qualities – clarity, courtesy, politeness, willingness to help callers	2 %
*	Mannerisms – smiling, face, alertness, posture and professionalism	2 %
	TOTAL	**10%**

B. HOSTING A TEA PARTY (GROUP PRACTICAL EVALUATION 40%)

Tea Party	30%
Report on tea party	10%
Total	40%

Candidates are required to host a tea party or any other function. Evaluation would be based on the following criterion:-

*	Design and sending of invitation cards	5 %
*	Room set-up and table setting- arrangement of dishes, cutlery, etc	5 %
*	Social etiquette during tea-party-greeting of guests and entertainment skills	5 %
*	Deportment – posture, poise and general conduct	5 %
*	Personal Grooming, make-up, dress sense, hairstyle, shoes, etc	5 %
*	Menu Card	5 %
*	Produce a report with all the above	10 %
	TOTAL	**40 %**

7.3 ASSESSMENT TIMELINES

Assignment	:	Due in Week 8
Telephone Techniques Practical	:	Due in Week 10
Practical Tea Party	:	Due in Week 12
Tea-Party Written Report	:	Due in Week 13
Final Examination	:	Due in Week 15

LEARNING SUGGESTIONS AND GUIDELINES

WEEK 1 AND WEEK 2

Over the two weeks of lectures and tutorials the focus will be to undertake the following:

- Introduction to Grooming and Dress Sense:

Learning outcomes to be attained:

- To understand the definition of Grooming and Deportment
- To understand the important of Professional Image as a Secretary
- To explore the role as a secretary
- To know the effects of a Professional Image on Self-confidence
- Understand the casual business dress & special occasion business attire.

Reading the preparation to be undertaken by the student:

Textbook:

	Chapter	Pages
(Professional Image – Author Ann A. Cooper, M. Ed	1 & 2	1 - 10

Reference

Visit the following Website for better understanding and study aids.
http://www.uwec.edu/Career/Online_Library/Proff_image.htm

WEEK 3 AND WEEK 4

Over the two weeks of lectures and tutorials the focus will be to undertake the following:

- Professional Dress and Wardrobe Management

Learning outcomes to be attained:

- To understand the definition on size, body shape, color and lines affect the individual clothing style selections.
- To understand the important of selection of clothing, job expectations and budget.
- To understand the clothing requires attention to its care and maintenance.

Reading the preparation to be undertaken by the student:

Text book:

	Chapter	Pages
(Professional Image – Author Ann A. Cooper, M. Ed	3 & 4	25- 37, 41 – 43, 45 - 58

Reference

Visit the following Website for better understanding and study aids.
http://www.uwec.edu/Career/Online_Library/Proff_image.htm

WEEK 5

Over the week of lecture and tutorial the focus will be to undertake the following:

- Manners and Etiquette for the Professional

Learning outcomes to be attained:

- Understanding requirement of behavior in the office.
- Understanding the company in your professional role.
- The important to maintain appropriate relationship in the workplace.
- To understand how to professional should keep his or her personal life out of the work place.
- Understanding proper table manners at social events.
- The importance of Manners and Etiquette
- Understand the customer Service
- The importance of eating and dining rules.

Reading the preparation to be undertaken by the student:

Textbook:

	Chapter	Pages
(Professional Image – Author Ann A. Cooper, M. Ed	5	75 – 85 61 - 73

Week 6 and 7

Over the two weeks of lectures and tutorials the focus will be to undertake the following:

- Event Planning 1 & II

Learning outcomes to be attained:

- To understand of event
- To understand what to consider when planning events
- To understand what are the considerations for events planning

Reading the preparation to be undertaken by the student:

Textbook:

	Chapter	Pages
(Professional Image – Author Ann A. Cooper, M. Ed	6	86 -

Week 8

Over the week the focus will be to undertake the following:

- TEA PARTY PRESENTATION

Learning outcomes to be attained:

- To display understanding of the event planning and so be able to organize a tea-party for a group of up to 50 pax and take into consideration all the factors as learnt in the module.

Week 9 and 10

Over the two weeks of lectures and tutorials the focus will be to undertake the following:-

- Receiving, making calls & Recommended Phrases for Telephone Users
- Do's and Don'ts for telephone users

Learning outcomes to be attained:

- To understand the procedures involved in Receiving and Making Calls
- To understand the courteous phrases to enhance the image of the company
- To understand the phrases for telephone users.
- To understand the techniques involved in handling calls
- To understand the uses of a telephone message sheet
- To know how to take massage correctly.

Reading the preparation to be undertaken by the student:

		Pages
Additional Notes		*As given*

Reference

Visit the following Website for better understanding and study aids.
www.longview.k12.wa.us/mmhs/wyatt/pathway/bcalls.html

NOTES:

MAKING TELEPHONE CALLS

You will use the telephone for cold calling, contacting referrals, answering ads, following up on interviews, and sometimes even the interview itself. Knowing how to use a tool effectively, keeps you from making costly mistakes.

Telephone Tips

Write a script. Your script should include the name of the person you are calling and your relationship to them (perhaps a referral), the purpose of your call, and what main points you need to discuss. The script will keep you on track and minimize the chance of forgetting some important information.

Identify yourself immediately. Never assume the person will remember who you are so remind them how you know them.
Ask "permission" to interrupt them. Find out if this is a good time to call. If not, schedule a better time and try to get a direct line or extension to avoid the telephone operator.
Eliminate all distractions: Turn off the radio, television or anything else that can distract you. Call from a quiet location and avoid using a cellular telephone. You don't want to be cut off in the middle of a conversation.
Listen Carefully. Be aware of the person's tone of voice to determine how willing they are to help you, take notes to capture important information.
Listening Tip to use throughout your job search:

L let others speak
I intend to "hear" what they are saying
S speak when it is your turn
T talk with them, not at them
E enthusiastically respond when appropriate
N never speak when else is talking

RECEIVING TELEPHONE CALLS

In today's job market employers call candidates at all times and on all days. You may receive a call from a company at 8:00 pm during the week or even on the weekend. Here are some ideas on how to prepare for the call coming from the employer.

- Have your job search files available. If you are caught off guard, ask the employer to hold for a minute while you change rooms or phones. This will give you a minute to locate your job search paperwork and collect your thoughts.

- Have a message pad ready, complete with guidelines in case you are not the one who answers the phone. Communicate with your family members what information they need to record.
- Do not have small children answer the phone.
- Have a professional outgoing message on your answering machine/service.

COURTEOUS PHRASES

Answer your own telephone whenever possible and answer within 2-3 rings. There are a number of ways to identify yourself and your organization:

LARGER ORGANIZATIONS – "Thank you for calling (dept name). How may I direct your call?"
SMALLER ORGANIZATIONS – "Thank you for calling (dept name). May I help you?"
DEPARTMENTS – "(dept name), Mary Smith," OR "Mary Smith, may I help you?"

There has been a lot of discussion of using "good morning" or "good afternoon." This is unnecessary if you use the right tone. Also, people tend to make mistakes when using these phrases (i.e., saying "good morning" when it's really afternoon and vice versa).

Because the phrases, "He's in conference" or "She's in a meeting," are greatly overused, many people don't believe it. The most appropriate response you can give is that someone is NOT AVAILABLE or is UNAVAILABLE. However, it is imperative to indicate when the person will be available (i.e., "She's not available, but I do expect her back in the office at 3:00 p.m.).

Other inappropriate responses include:

He isn't in yet (and it's 10:00 a.m.)
She's out for coffee
He's gone for the day (and it's 3:00 p.m.)
She's in, but she's busy

NOTE: If, on occasion, you say that an individual is "in a meeting," ALWAYS include an approximate time when he or she will be available.

Although we tell our callers a lot through our voice tone, the words and phrases we use convey a message. Unfortunately, sometimes we send a negative message to our caller. Be aware of the language you are using. Instead of saying "You have to…You need to…Why didn't you?" try "Will you please…Would you please?"

"Your problem" or "Your complaint," would sound better phrased as "Your question," "Your concern," or "this situation." Many people use phrases like "I can't do that" or "it's not my job." Instead, tell the caller what you can do (i.e., "While I'm not able to establish policy on this matter, I will speak to my manager about your concern.")

At all costs, avoid sounding abrupt. The following are examples:

"Hang on."
"Hold on."
"Who's calling?"
"I can't hear you, speak up!"
"I can't help you. You'll have to speak to someone else."

The following would be more appropriate:

"May I put you on hold?"
"May I say who is calling please?"
"I am having a little difficulty hearing you. Can you please speak up?"
"I need to transfer your call to (dept.) so that they can answer your question. May I do so?"

USE OF A TELEPHONE MESSAGE SHEET: TAKING MESSAGES

Whenever possible, use telephone message forms to record accurate and complete information. A good phone message includes:

Name of person for whom the message was left
Caller's name (get the correct spelling), company or dept. and number
Date and time
Message
Action to be taken (i.e., "Please Call," "Will call back," or "URGENT")

It is important to deliver the message as soon as possible and maintain confidentiality with all messages. Either turn the message over or fold them in half, so there is no danger that they can be read by other staff or visitors.

Week 11 and 12

Over the two weeks of lectures and tutorials the focus will be to undertake the following:

- Screening calls & shielding employers
- Withholding confidential information tactfully

Learning outcomes to be attained:

- Understand on how to screen calls
- Understand on how to shield the employer from unnecessary calls and callers
- Understand on how to express regret when the employer is unable to take the calls
- Understand the tactics available in handling callers who try to find out confidential
- Information about the company and its staff
- Understand how to shield the employer from unwanted calls/callers
- What excuses to give on behalf of the employer who does not wish to take a call
- Passing of important and relevant calls to the employer.

Reading the preparation to be undertaken by the student:

		Pages
Additional Notes		*As given*

NOTES:

SCREENING CALLS

There is a lot of controversy over whether or not telephone calls should be screened. It is not recommended to screen calls for good public relations!! If you must announce calls, “Yes he’s in. May I tell him who’s calling, please?” is an appropriate response.

When it’s necessary to screen calls (i.e., if someone is available ONLY to certain individuals), “She’s away from her office; may I take your name and number?” OR “May I say who’s calling? Thank you. Let me check and see if he’s in.” are suggested responses.

If you are required to ask who is calling or what the nature of the call is, be aware of your tone of voice. Screening calls is always a delicate situation, so it is critical not to offend or put your caller on the defensive with your voice tone.

Log on to: http://www.legalsecretaries.org/articles/telephone.htm

TECHNIQUES INVOLVED IN HANDLING CALLS

Importance of First Impressions
- You! The telephone ambassador
- First (and lasting) impressions
- Why do customers call you?

Building a Rapport with Clients
- Avoiding communication barriers
- Understanding caller behaviours
- Recognising limitations of the telephone
- Emphasising a “can do” attitude
- Building better relationships

Skills of Communication
- Creating rapport on the phone
- Developing skills for active listening
- Developing skills for effective questioning
- Making the best of your voice
- Taking and leaving effective messages
- Providing information to callers
- Working with voicemail

Handling Difficult Calls
- Handling complaints objectively
- Using diplomacy when dealing with callers
- Focusing on what you can do, not what you can't do!
- Learning from difficult call experiences

Week 13

Over the week of lecture and tutorial the focus will be to undertake the following:

- Telephone calls dialogue practice

Learning outcomes to be attained:

- Written Class Test 1 - Oral telephone Calls

Reading the preparation to be undertaken by the student:

NOTES

SAMPLE PHONE SCRIPT: LEAVING A MESSAGE

Assistant: "Atlantis Company, good morning"

Student: "Mr. Adam's Office, please."

Assistant: "He is away from his desk. Would you like to leave a message?"

Student: "Yes. My name is Jan Stella. My telephone number during the day is 98546788. As a student at a local university, I found Mr. Adam's name listed in our communication Network. I am doing research into the engineering field, and would like to speak to Mr. Adams for career advice. If he can't provide the information, I am hoping he could direct me to someone who may be able to help.

Assistant: "Have you sent your resume to Mr. Adams?"

Student: "No, I'm not ready to submit a resume at this time. I am just researching career options in the area to find out more about engineering jobs in general. Do you know when Mr. Adams will be available to call me?"

Assistant: "He will be in later this morning. I will make sure he gets your message."

Student: "Excuse me, I didn't get your name."

Assistant: "My name is Ms. Marion."

Student: "Thank you, Ms. Marion. I look forward to hearing from Mr. Adams."

MR. ADAMS CALLS JAN STELLA

Mr. Adams: "Hello Jan. Your message said you were looking for some information regarding careers in the engineering field. What would you like to know?"

Student: "Yes, I would. Thank you for calling me back. Do you have about 15 minutes that you could discuss your experience as an engineer? Or could we schedule a convenient time for us to speak?

Mr. Adams: "Jan, this is a great time."

Student: As a student, I have been doing some research into various careers that interest me. The article in Engineering Today about your corporation and your position was very interesting. Could you first tell me how you got involved in the engineering field? (then there were other questions)

Mr. Adams: (answers questions)

Student: "Thank you for your time. I know that it is very valuable and I appreciate it."

WEEK 14

Over the week of lecture and tutorial the focus will be to undertake the following:

- Telephone Techniques Final Presentation
- Individual Students will be placed in a room and will be test on answering incoming calls, receiving calls, transferring calls and taking message.

WEEK 15

FINAL EXAM