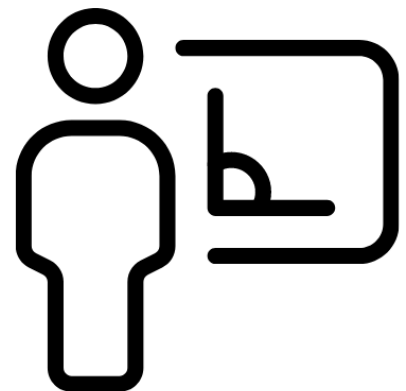


Instructors Guide



On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor for each lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.



The ability to simplify means to eliminate the unnecessary so that the necessary may speak.

Hans Hoffman

Sample Module: Getting Organized (I)



Organization begins at your data entry points. Emails, voice mails, and interoffice mail are all channels that ebb and flow with information that require processing and organization. In this module we are going to take a moment to see how these various entry points of information can be harnessed and used efficiently.

Dealing with Email



Email is one of the largest sources of information you will have to deal with on a daily basis. Email is a useful tool if handled properly. It is common practice for an administrative assistant to be in charge of their manager's inbox. This means you, as an assistant, have to monitor twice as much email, and typically managers tend to have more emails than regular employees.

Although having email makes communication much easier, it does present some issues when it comes to organization. Determining which emails are important or should be deleted places you in the position of making decisions for both you and your manager. You cannot approach your manager to ask if this email is important or not. That is why you are there. Having a technique that enables you to process emails systematically allows for faster decision-making and organizing. Below is a quick and easy technique you should use to process emails more effectively.

The **READ** technique allows you to process emails in the following manner:

- **Read**
- **Evaluate**
- **Act**

- Delete

The Act step in the process is the most important. Here you determine the following:

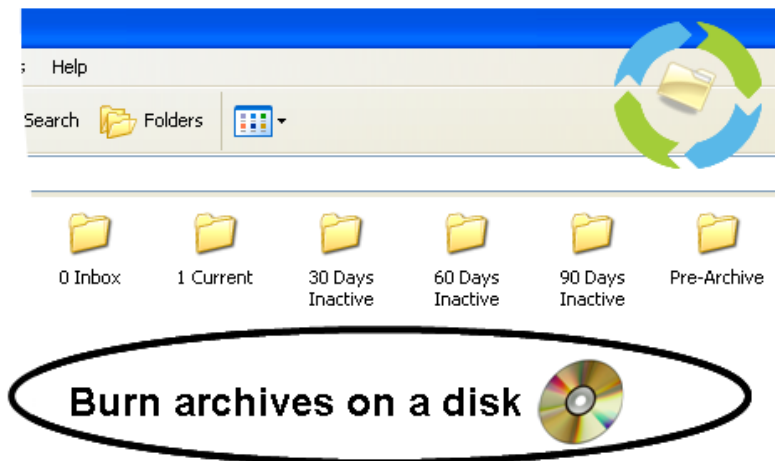
- Do you reply to the sender?
- Do you relay this information to you manager?
- Do you resource this information for future reference?
- Do you reject the email and delete it?

Estimated Time	10 Minutes
Lesson Objective	To identify the steps in the R-E-A-D technique on how to handle emails.
Lesson Summary	<p>The four steps to handling email in the R-E-A-D technique are:</p> <ol style="list-style-type: none"> 1. Read the email <ol style="list-style-type: none"> a. As soon as you can 2. Evaluate the content <ol style="list-style-type: none"> a. Who sent it b. To whom is it addressed c. Is it time sensitive d. Does it require action 3. Act on the information <ol style="list-style-type: none"> a. Reply b. Relay c. Resource d. Reject 4. Delete <ol style="list-style-type: none"> a. Keep your email inbox uncluttered
Materials Required	Worksheet 1: READ Job Aid

	Worksheet 2: Sample Emails Set1 Worksheet 3: Sample Emails Set2
Planning Checklist	Have enough worksheets for each participant.
Recommended Activity	<p>In small groups, distribute Worksheet 2: Set One emails and instruct the groups to handle them as they see fit. Give them two minutes to complete</p> <p>Next, distribute Worksheet 1: READ job aid and Worksheet 3: Set Two emails to each group. Give them two minutes.</p> <p>Once done, debrief by getting feedback on how the groups felt handling emails without a specific technique.</p>
Stories to Share	On average, a person receives 304 business emails a day. This does not include the average 274 personal emails we read at home and sometimes at work. That is a lot of information to process.
Delivery Tips	Make sure groups have a maximum of four participants each.

Managing Electronic Files

Major file folder structure:



Storing electronic files is easy, but can create a haven for outdated and unorganized documents. Many people take the same approach with electronic folders like physical file folders and use them as places to hold every document, saving them for just-in-case. This is not the best strategy, because memory space on the server or your computer is usually a limited commodity. Enormous data files slow your system down and create a vast sea of files to manage.

Another issue with electronic files is the organization. Having endless files filled with randomly named documents slows you down when you need to search for a particular document. Without a file naming strategy, you will most likely have to rely on your memory for retrieval, which is another time waster. Taking the time to set up your folders and naming both files and documents with a systematic format makes organizing and searching your files and documents more efficient.

Having a filing strategy that manages your file size and facilitates faster retrieval is the goal. Moving files through phases of inactivity helps you determine when to archive your data to external media. Finally, naming your documents with a uniform pattern allows you to use the search function on your computer more effectively, taking away the need to rely on your memory.

The method presented here is a recommendation. You certainly can modify this to fit your individual needs and circumstance.

Just remember the following when developing your own strategy:

- Make it consistent
- Use your computer’s file search function
- Make it time sensitive
- Place your archive material on an external medium

Estimated Time	10 minutes
Lesson Objective	To understand how developing a file and document naming strategy and time-sensitive filing reduces search time and file clutter.
Lesson Summary	<p>The key to managing files and documents is to develop a naming strategy that is consistent and searchable In addition, use a major file format that is structured by time.</p> <ul style="list-style-type: none"> • Develop a naming strategy for files and documents <ul style="list-style-type: none"> ○ For files: date opened and Name <ul style="list-style-type: none"> ▪ (ex. MMDDYY Jones account) ○ For documents: date received, name and document type <ul style="list-style-type: none"> ▪ (ex. MMDDYY Jones Account Proposal) • Structure major files by increments of time related to inactivity

	<ul style="list-style-type: none"> ○ In Box: rename document and move to current work folder ○ Current folder: files containing documents less than 30 days old ○ 30, 60, and 90-Days Inactive folder: move files into these folders according to their inactivity ○ Pre-archive folder: files greater than 90 days inactive. Delete any irrelevant documents and archive the rest on a disk
Materials Required	Visual representation of file structure on power point Worksheet 4: Electronic Files
Planning Checklist	Test projector before class Print enough electronic files worksheets for all participants
Recommended Activity	Display the power point with the folder structure model. Have participants work in pairs and complete worksheet
Delivery Tips	Explain model on power point before going into activity.

Keeping Track of the Paper Trail



Even in our electronic age, we still have to contend with paperwork. You may receive letters from customers, invoices, or contracts. Being an assistant, you will need to manage and keep track of all the paperwork that is circulating around your desk.

Often times, you will need to act on the paperwork and send it to other departments, like accounting or HR. Other times, you may need to produce a report and have it ready on a certain day for your manager. Having an organized method of tracking your paperwork at your desk helps to reduce missed deadlines and lost paperwork.

A good practice is to create a filing system, using either a traditional filing cabinet at your desk or a Pendaflex folder. The strategy here is to stage out the paperwork over the course of the week. You will need an inbox, five folders for each day of the week, a folder for next week's work, outbox and a red rush folder.

Place the inbox in a clear area on your desk. Review the paperwork in the inbox and determine what day you intend to work on the item. Place the item in the corresponding day of the week. If you determine it does not need to be done this week, place it in the Next Week's folder. As you process the work each

day, either file the documents you do not need to send out or place the document in the Outbox for sending in the mail or interoffice system.

Note: The outbox concept will be elaborated on more in the next module.

Use the Red Rush folder as a communication piece between you and your manager, when an urgent document needs to be addressed. This takes precedence over other jobs. Finally, at the beginning of the new work week, review your Next Week’s folder and your Inbox and plan out your work for this week.

Applying this strategy consistently is essential to its effectiveness.

Estimated Time	10 minutes
Lesson Objective	To understand a system of organizing paperwork at your desk.
Lesson Summary	<p>Create a paper-organizing strategy that uses the following tools:</p> <ul style="list-style-type: none"> • An inbox • A folder for each day of the business week • A folder for holding work for next week • An outbox • A red rush folder
Materials Required	Flip chart, Markers
Planning Checklist	<p>Be familiar with the lesson summary above</p> <p>Be familiar with the questions below for sharing activity</p>
Recommended Activity	<p>Have participants form table teams of at least four participants each.</p> <p>Ask the teams to responds to the following:</p> <ul style="list-style-type: none"> • What are some challenges you face in keeping your paperwork organized? • What are best practices you can share on how to handle paperwork? <p>Have teams share their answers and write them down on the flip chart.</p> <p>Debrief the activity by sharing the system of organizing paperwork as described in the lesson summary.</p>

Stories to Share	Personal experiences, anecdotes, parables, etc. that an experienced trainer may include with the topic.
Delivery Tips	Have table teams elect a leader to share table team's responses to questions.

Making the Most of Voice Mail

Voice mail could be the most misused form of communication in the business world. There are countless ways this could be accomplished. Here is a list of possible offenses:



- Caller hears voice mail greeting and waits until the beep to hang up, leaving a recording of the hang up.
- Caller leaves a message to call back with no background information.
- Caller is obviously unprepared to leave a message and is thinking out loud and rambling on and on.
- Caller begins leaving information without first warning you, causing you to have to replay the message.
- Caller leaves way too much information in their message.
- Caller lacks common courtesies, like please and thank you.

These are just some of the abuses committed when leaving a voice mail. Voice mails should be well planned and professional. You may be asked to leave a message for a senior vice president or important client. Being prepared is the key to well executed voice mails.

Taking a systematic approach to making phone calls and leaving voice mails will make the process more efficient and make the best use of the time you are investing in making that call.

Here are some steps you can take to ensure you are making the most out of your voice mail:

- Plan times during the day to make your calls instead of being random.
- Before you make your calls summarize the nature of each call and write it down.
- Have a prepared greeting with your name, time of day, and contact information
- Make your message short
- Before giving instructions or information the recipient has to write down, tell them to get a pen ready and pause for a few seconds so they can prepare.

- Always be professional and use common courtesies.

Estimated Time	10 minutes
Lesson Objective	To understand the steps to planning an effective voice mail message.
Lesson Summary	<p>Here are some basic steps in planning your voice mail</p> <ul style="list-style-type: none"> • Plan a time in the day to make your calls all at once. • Write a brief plan for all your calls in case you need to leave a message <ul style="list-style-type: none"> ○ Leave name, time of day, and contact information ○ Make your message short ○ If recipient is to act on your message, leave enough information to avoid a call back ○ If you are relaying information pause so that the recipient is able to prepare for writing down information ○ Remember to use common courtesies and use a pleasant tone.
Materials Required	<p>Worksheet 5: Poorly Executed Voice Mail</p> <p>Worksheet 6: Well Executed Voice Mail</p> <p>Flip chart, Markers</p>
Planning Checklist	<p>Print enough worksheets of both samples for all participants.</p> <p>Be familiar with each sample.</p>
Recommended Activity	<p>Give participants worksheets and have them write down the pros and cons of each sample.</p> <p>Encourage participants to share their thoughts and jot them on flip chart</p>
Stories to Share	<p>Have you ever received a voice mail from a person who clearly did not plan the call? You get to hear them thinking out loud for about a minute or two, then they say in a hurry, “Just call me back!” How frustrating is that?</p>

Delivery Tips	Review the poorly executed sample before the well-executed.
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Practical Illustration



Alex recently obtained a fulltime job at a telecommunication company. Since he joined the company, he has struggled because being organized is not his forte. Alex's manager decided to teach him how to keep email organized so as to avoid losing data or forgetting to reply to messages. Focusing on who sent it and the content of the email, helped Alex a lot. His manager also taught him how to plan and manage electronic files in such a way that would keep everything organized.

Additionally, Alex was also taught how to handle offline equipment and voice/video calls. Alex appreciated all he was taught and avoided being fired. He also started thinking for himself, which in turn has made him an asset to the company, and more specifically, to his manager.

Sample Module: Review Questions

1) What does the READ technique imply?

- a) Read, Edit, Abbreviate, Debate
- b) Rush, Enter, Absorb, Debug
- c) Read, Evaluate, Act, Delete
- d) Randomize, Economize, Acquire, Delete

Read, Evaluate, Act, Delete

2) Find a question which IS NOT important for the Act step?

- a) Do you reply to the sender?
- b) Do you resource this information for future reference?
- c) Do you reject email and delete it?
- d) Do you have time to read such a large email?

The Act step in the process is the most important. Here you determine the following: Do you reply to the sender? Do you relay this information to you manager? Do you resource this information for future reference? Do you reject the email and delete it?

3) Why is naming the electronic documents with a uniform pattern convenient?

- a) It helps you to use the search option more effectively
- b) It looks more orderly
- c) It seems more professional
- d) It is easier to remember where the documents are stored

Naming the electronic documents with a uniform pattern helps you to use the search option more effectively.

4) What does the time sensitive strategy for arranging electronic files imply?

- a) Using the files right away when they are received
- b) Arranging the files when they are received
- c) Separating the files based on the time of their inactivity
- d) Deleting the files after awhile

Moving files through phases of inactivity helps you determine when to archive your data to external media.

5) How many kinds of folders for paperwork are recommended?

- a) 5
- b) 2
- c) 3
- d) 1

You will need an inbox, **five** folders for each day of the week, a folder for next week's work, outbox and a red rush folder.

6) What is the Red Rush folder for?

- a) For communication with the manager in need of urgent addressing of a document
- b) For leaving the everyday paperwork to the manager
- c) For storage of the daily amount of received documents
- d) For storage of the unnecessary documents

Use the Red Rush folder as a communication piece between you and your manager, when an urgent document needs to be addressed.

7) _____ begins at your data entry points.

- a) Filing
- b) Organization
- c) The work day
- d) Your job

Organization begins at your data entry points.

8) _____ is one of the largest sources of information you will have to deal with on a daily basis.

- a) Folders
- b) A paper trail
- c) Email
- d) Files

Email is one of the largest sources of information you will have to deal with on a daily basis.

9) A good practice is to create a filing system, using either a traditional filing cabinet at your desk or a _____ folder.

- a) Pentagon
- b) Pliable
- c) Pendaflex
- d) Purposeful

A good practice is to create a filing system, using either a traditional filing cabinet at your desk or a Pendaflex folder.

10) Plan times during the day to make your _____.

- a) Choices
- b) Calls
- c) Career moves
- d) None of the above

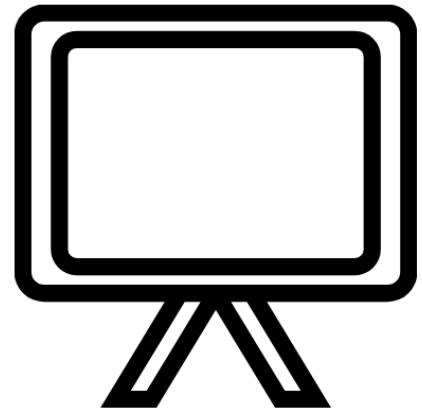
Plan times during the day to make your calls instead of being random.

PowerPoint Slides



Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide.

PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.





“

The ability to simplify means to eliminate the unnecessary so that the necessary may speak.

Hans Hoffman

MODULE TWO

Getting Organized (I)

Organization begins at your data entry points.

Emails, voice mails, and interoffice mail are all channels that ebb and flow with information.



Dealing with Email

It is common practice for an administrative assistant to be in charge of their manager's inbox. This means you, as an assistant, have to monitor twice as much email.

Managing Electronic Files

- Make it consistent
- Use your computer's file search function
- Make it time sensitive



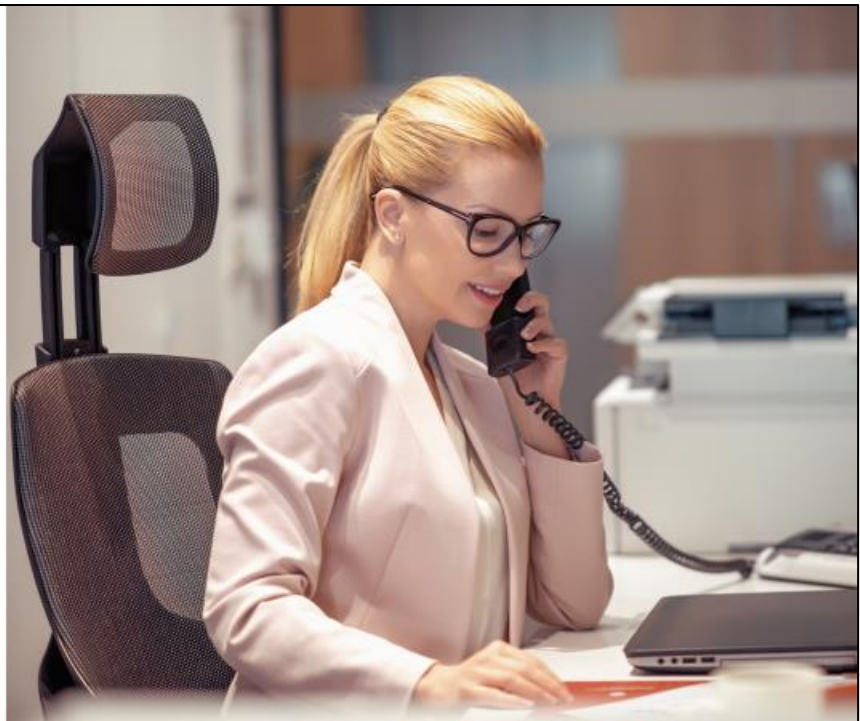


Keeping Track of the Paper Trail

A good practice is to create a filing system, using either a traditional filing cabinet at your desk or a Pendaflex folder.

Making the Most of Voice Mail

Taking a systematic approach to making phone calls and leaving voice mails will make the process more efficient.



Practical Illustration



- Dealing with Email
- Managing Electronic Files
- Keeping Track of the Paper Trail
- Making the Most of Voice Mail

Module Two: Review Questions

1. What does the READ technique imply?

A. Read, Edit, Abbreviate, Debate

B. Rush, Enter, Absorb, Debug

C. Read, Evaluate, Act, Delete

D. Randomize, Economize, Acquire, Delete

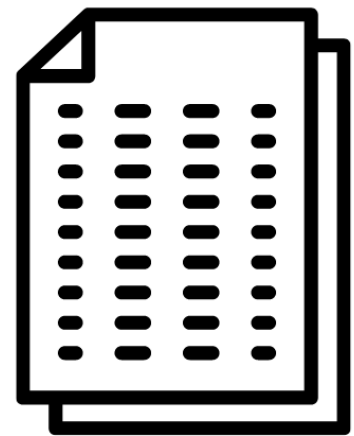
Handouts



Each course is provided with a wide range of worksheets.

Worksheets help check your participants' understanding. If a lesson calls for a worksheet, it will be listed in the Lesson Plan box under Materials Required. All worksheets are customizable and can be found in the Appendix of the Instructor Guide and the Training Manual.

As a trainer, icebreakers give your participants the opportunity to get to know each other better or simply begin the training session on a positive note. Icebreakers promote collaboration, increase engagement, and make your training more light-hearted and fun. Below is an example from the Icebreakers folder.



Sample Worksheet 1

READ Job Aid

1. **Read** the email

b. As soon as you can



5. **Evaluate** the content

a. Who sent it

b. To whom is it addressed

c. Is it time sensitive

d. Does it require action



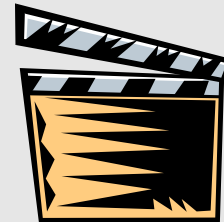
6. **Act** on the information

a. Reply

b. Relay

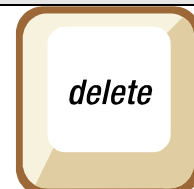
c. Resource

d. Reject



7. **Delete**

a. Keep your email inbox uncluttered



Sample Worksheet 2

Sample Email Set 1

From: Sally

To: You

Subject: Meeting Notes

Hello,

Attached are the meeting notes for your review.

Thanks,

Sally

From: John, VP of Compliance

To: You

Subject: Compliance Review

Good morning,

Your department is scheduled to be audited by the Federal regulatory agency next week. Please ensure that your department files are in order before next week. If you have any questions, please let me know

Regards,

John

From: Mary, IT Support

To: You

Subject: Software Project Status

Hello,

The software upgrade project is about to begin and we need to have an inventory of all the software applications you use within you department ASAP. We apologize for the late notice, but we received the go ahead on this project late last night.

Regards,

Mary

From: Harry

To: Sales Department

Subject: Important

Good morning,

It is Mary's birthday in IT tomorrow and we want to organize a surprise birthday celebration. Let me know if you want to help organize it. We need to get a cake and some snacks. We do not spend a whole lot of money, but we do not want to be cheap either. Anyway, let me know if want to help. Remember to keep this a secret.

Thanks,

Harry

From: Wanda, SVP

To: All staff

Subject: Announcement

Good morning,

It is my pleasure to announce our new VP of Marketing Mark. He has extensive experience in our industry and brings a wealth of knowledge to our organization. Let us all give him a warm welcome as he becomes familiar with our operations.

Regards,

Wanda

Sample Worksheet 3

Sample Email Set 2

From: Margaret, Director of HR

To: You

Subject: Employee evaluation

Good morning,

You have an evaluation due to the HR department in two weeks. In addition to the evaluation, we are asking the employees to take a survey after the evaluation to gauge our process. Please ensure that the survey is taken.

Regards,

Margaret

From: Bob, Frontline manager

To: You

Subject: Career path

Hello,

I have an employee that wants to learn more about the sales department. They want to spend time in your area and see what it takes to be a sales person. I told them I would ask to see if this is possible. I made no guarantees. I appreciate your time.

Bob

From: Glen, Your boss

To: You

Subject: Set up conference call

Hello,

Could you please set up a conference call with our clients in New York? Please make sure we have worksheets printed and ready to before the meeting starts. The meeting should not take more than an hour, but schedule extra time to be safe. If you have any questions, please let me know.

Thanks

From: Francis, HR admin

To: HQ staff only

Subject: Please read

Hello everyone:

We are looking for some ideas from our employees on how to make our place a more fun place to work. Send your suggestions to the HR mailbox via email. We are seriously going to consider all submission. Thank you in advance for your participation.

Sincerely,

Francis

From: Nancy, Assistant to the CEO

To: You

Subject: Sales report

Good morning,

We need the sales report for last month. It is important that we get this today by 1:00 PM no later. I need to prepare this information for the Board of Director's meeting later today.

1. **Read** the email

- a. As soon as you can



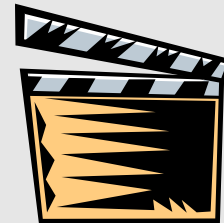
2. **Evaluate** the content

- a. Who sent it
b. To whom is it addressed
c. Is it time sensitive
d. Does it require action



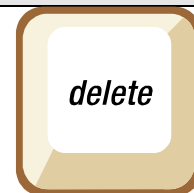
3. **Act** on the information

- a. Reply
b. Relay
c. Resource
d. Reject



4. **Delete**

- a. Keep your email inbox uncluttered



Sample Worksheet 4

Electronic Files Worksheet

Today's Date is November 15, 20XX



Image faxed received on
October 12, 20XX



Inbox



Sales report last viewed on
September 8, 20XX



Current



Email attachment of expense
report dated August 2, 200XX



30 Days



Meeting notes completed on
November 10, 20XX



60 Days



Employee evaluation performed
on June 1, 200XX



90 Days



Email attachment of compliance
recommendations received
today



Pre-Archive



Email attachment of Industry
report received July 15, 200XX



Archive

Sample Worksheet 5

Poorly Executed Voice Mail

This is a message left on voice mail. Figure out what improvements you could make to make the message more efficient.

Beep!

Hey! I wanted to ask you a question about an account I am reviewing. Give me a call back when you get this message. I am not at my desk, so call me at 123-456-7788, extension 45688. Bye.

Sample Worksheet 6

Well Executed Voice Mail

Here is another voice mail message. Identify some best practices you hear in this message.

Beep!

Good morning Melissa, this is John in accounting and it is 9:30 AM. I have a past due invoice from one of our supplier accounts. It looks like you bought supplies two months ago and I need to know the items you bought. If you have the list please fax it to me. You may want to get a pen and paper to write my fax number down (pause). My fax number is 123-4567. If you do not recognize this invoice, please give me a call. I am not at my desk today, so you may need your pen and paper again to take this number down (pause). You can reach me at 123-654-7899, extension 45668. Thank you and have a good morning.

Icebreaker: Thinking Outside the Box

PURPOSE

To introduce participants to each other and to get them thinking creatively

MATERIALS REQUIRED

1. Name tag for each person
2. Markers
3. Index cards
4. A cardboard box large enough to hold the remaining items
5. A small skillet
6. A jump rope or short length of plain rope
7. An envelope
8. A sheet of newspaper
9. A rubber band
10. A coffee stirrer
11. A nail
12. A chenille stick (pipe cleaner)

You can substitute the items in the box to suit your requirements. The purpose is to take everyday items and to have the participant's think of the selected items in new ways.

PREPARATION

Have each participant fill out a name tag.

TIME REQUIRED

20 minutes

ACTIVITY

Have everyone introduce themselves by stating their names and one statement about themselves, such as their current positions, or what most interests them about creative problem solving.

Divide the participants into small groups of four to six people. Each group should get 1-2 items from the box (or the box itself). The challenge is to think of at least five creative ways to use each object, **BESIDES**

the conventional purpose the item usually serves. Tell the teams the rule is no censoring – all ideas are encouraged – the zanier, the better! Have the teams write down their suggestions on index cards. Encourage the teams to come up with the most creative suggestions they can. If time permits, have each team trade objects and repeat the activity.

For example, the sheet of newspaper could be folded to become a hat or a boat; it could be shredded and used as packing material; it could even be used as substitute toilet paper in a pinch! Encourage the teams to stretch their imaginations.

At the end, have each team share its ideas with the whole group.

Quick Reference Sheets



Below is an example of our Quick Reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date. They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.



Administrative Support Quick Reference Sheet



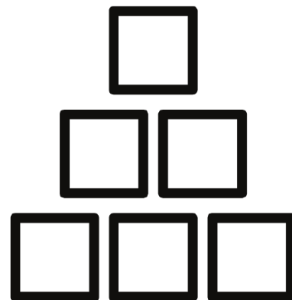
Making the Most of Voice Mail

- Caller hears voice mail greeting and waits until the beep to hang up, leaving a recording of the hang up.
- Caller leaves a message to call back with no background information.
- Caller is obviously unprepared to leave a message and is thinking out loud and rambling on and on.
- Caller begins leaving information without first warning you, causing you to have to replay the message.
- Caller leaves way too much information in their message.
- Caller lacks common courtesies, like please and thank you.



Keeping Your Workspace Organized

- Create a landing place where you will begin processing work either from left to right or vice versa. This work could come from your paper trail folder system mentioned earlier, or just work you have to complete.
- Move your first task to the middle of your desk where your computer and other office supplies are neatly organized in trays or holders.
- Once the work is complete, place them in one of four trays at the other end of your desk. These trays are the Outboxes mentioned earlier in the previous module.
- Mark your trays "To be filed", "To be mailed", and "To be reviewed" or "Pending information."



Listening and Hearing: They Aren't the Same

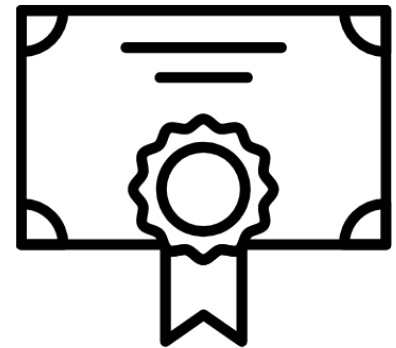
- Disengage from whatever you are doing and face the person
- Do not answer the phone when it rings, unless it's an important call you were waiting for, then ask the person if you could answer the phone
- Use a note pad to jot important things down
- Summarize the conversation
- Maintain eye contact
- Ask questions
- Avoid thinking ahead or focusing on what you are going to say next



Certificate of Completion



Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.



CERTIFICATE OF COMPLETION

[Name]

*Has mastered the course
Administrative Support*

Awarded this _____ day of _____, 20____

Presenter Name and Title
