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Modern Secretarial and Office Skills Essentials

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Modern Secretarial and Office Skills Essentials

Modern secretarial and office skills are the everyday practices of keeping a workplace organised: maintaining diaries, files and records, handling calls and visitors, and writing clear correspondence with current software. This 1-week course is for secretaries, receptionists and office assistants in their first years or moving into the job, and its final deliverable is a personal desk procedures file with a filing scheme, diary rules and correspondence templates.

Introduction

The course rests on three working references. The records lifecycle describes how a document is created, used, retained and finally disposed of, and shapes the filing scheme. The urgent-important matrix sorts tasks by deadline and consequence so that a day can be planned. Plain English principles guide letters, emails and memos towards short sentences and one clear request. The level is foundation and assumes no previous training. Teaching uses an in-tray simulation, telephone role-plays and hands-on exercises in Outlook, Word, Excel, PowerPoint and Google Workspace.

Course Objectives

- Define the duties of a secretary today and distinguish them from those of a personal assistant to one manager
- Distinguish paper from electronic filing and select a naming and folder scheme that colleagues can follow
- Apply the urgent-important matrix and diary rules to plan a day that serves more than one manager
- Compare email, letter and memo formats and select the right one for each message
- Apply call-handling and visitor routines that keep confidential matters private
- Interpret a request and select the software feature, from mail rules to spreadsheet tables, that completes it fastest

Target Audience

- Newly appointed secretaries, who must decide how to organise the diary, files and inbox they inherit
- Receptionists and front-desk staff, who must judge how to route calls and visitors without disclosing confidential matters
- Clerks and junior assistants, who must select the format and tone for the letters, emails and memos they prepare
- Team coordinators serving several colleagues, who must prioritise competing requests within the same day
- Staff moving into secretarial posts from other functions, who must choose which software habits to build first

Course Outline

Day 1: The Secretary's Job and Professional Conduct

- Secretary vs Personal Assistant: Shared Duties Compared with One-Manager Responsibilities
- How the Profession Has Changed: From Typing Pools to Digital Workplaces
- Professional Image: Dress, Desk Presence and First Impressions with Visitors
- Workplace Ethics: Discretion, Honesty and Confidential Information in Daily Work
- Value of Organised Front-Line Staff: How Order Raises Team Productivity

Day 2: Organising the Workplace and Records

- Paper vs Electronic Filing: Physical Folders Compared with Shared Drive Structures
- Records Lifecycle: Creating, Using, Retaining and Disposing of Documents Correctly
- Folder and File Naming Conventions: Schemes Colleagues Can Search and Follow
- Workflow Mapping: Tracing How Requests Move Between Desks and Approvals
- Document Control Basics: Versions, Templates and Simple Quality Checks

Day 3: Speaking, Listening and Handling Calls

- Telephone vs Face-to-Face Contact: Tone, Pace and Note-Taking Differences
- Active Listening and Questioning: Open, Closed and Clarifying Questions in Practice
- Call Handling Routine: Greeting, Screening, Transferring and Taking Messages Accurately
- Barriers to Understanding: Noise, Jargon and Assumptions and How to Remove Them
- Cross-Cultural Courtesy: Greetings, Names and Formality with International Callers

Day 4: Writing Emails, Letters and Memos

- Email vs Letter vs Memo: Choosing the Format for Each Audience
- Plain English Principles: Short Sentences, Active Verbs and One Clear Request
- Formal Business Letters: Layout, Salutation, Reference Lines and Closing Conventions
- Short Reports and Memos: Structuring Facts, Findings and Next Steps
- Meeting Notices and Reminders: Wording Invitations, Agenda Requests and Follow-Ups

Day 5: Microsoft Office for Daily Work

- Outlook Rules vs Manual Sorting: Automating the Inbox Compared with Hand Filing
- Outlook Calendar and Contacts: Shared Diaries, Meeting Requests and Address Books
- Word Productivity Features: Styles, Templates and Mail Merge for Routine Letters
- Excel for Everyday Lists: Tables, Sorting, Filters and Simple Formulas
- PowerPoint Basics: Preparing Clean Slides for a Manager's Presentation

Day 6: Cloud Collaboration and Digital Assistants

- Google Workspace vs Microsoft 365: Comparable Apps for Mail, Documents and Sharing
- Online Scheduling Platforms: Booking Pages, Time Zones and Availability Settings
- Task Boards and To-Do Apps: Tracking Requests from Arrival to Completion
- Virtual Meeting Platforms: Setting Up Calls, Links and Shared Screens
- AI Writing and Summary Assistants: Uses, Limits and Checking Outputs Before Sending

Day 7: Planning the Day and Desk Procedures Practice

- Urgent vs Important: Using the Prioritisation Matrix to Order a Day's Tasks
- Serving Several Managers: Diary Rules and Agreed Turnaround Times
- Calendar Planning and Time Wasters: Buffers, Recurring Items and Interruption Control
- In-Tray Simulation: Applying Filing, Writing and Prioritisation to a Full Morning's Work
- Desk Procedures File: Completing the Filing Scheme, Diary Rules and Templates

Skills You Will Gain

- Diary Planning
- Records Filing
- Call Screening
- Plain English Writing
- Mail Merge
- Spreadsheet List Handling
- Cloud File Sharing

Why Attend This Course

- From an inherited inbox and diary in disorder to rules that keep both under control each day
- From files saved wherever space allows to a naming and folder scheme the whole team can search
- From rewriting letters several times to templates and plain English habits that get them right first time
- From learning the job by trial and error to a desk procedures file covering filing, diaries and correspondence

Conclusion

Secretarial work at this level is the craft of keeping information, time and messages moving so that a team can concentrate on its own tasks. The course makes three distinctions clear: paper against electronic filing, urgent against important work, and email against letter and memo. It suits secretaries, receptionists and assistants who are new to the job or returning to it and need a sound grounding over seven days, before any longer study of executive office practice.

Course FAQs

What are modern secretarial and office skills?

Modern secretarial and office skills are the daily practices of running a workplace desk: organising diaries and files, answering calls and visitors, writing clear correspondence, and using office software and cloud apps to complete requests accurately and on time.

What is the difference between urgent and important tasks in secretarial work?

An urgent task has a near deadline; an important task has a large consequence for the team's goals. The two do not always coincide, so a secretary plans important work into the diary rather than letting urgent requests fill the whole day.

Which methods does the modern secretarial and office skills course follow?

The course follows the records lifecycle for filing, the urgent-important matrix for planning and plain English principles for correspondence, practised in Outlook, Word, Excel, PowerPoint and Google Workspace.

Is the modern secretarial and office skills course right for a receptionist?

Yes. Receptionists practise call screening, message taking and visitor routines, and learn the diary, filing and writing habits that let them cover secretarial duties when needed.

What do delegates produce in the modern secretarial and office skills course?

Delegates produce a desk procedures file containing a folder and naming scheme, diary rules for one or more managers, and templates for letters, emails, memos and meeting notices.