Secretarial Skills: Diaries, Filing and Office Tools

25 – 29 January 2027
London (UK)



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Secretarial and office management essentials are the core duties, organising habits and office tools that keep an executive's day and an office's records running smoothly. This 1-week course is for secretaries and administrative assistants moving towards office management, and delegates finish with an office essentials toolkit containing a filing plan, scheduling rules and a personal productivity plan.

Introduction

The course rests on three references. ISO 15489 is the international standard for records management, used here to set principles for filing and electronic archives. Kanban is a visual method for tracking work items from request to completion on a board. SMART goals are objectives that are specific, measurable, achievable, relevant and time-bound. The level is foundation to practitioner: delegates know basic office work and now organise it to a consistent standard. Teaching uses practical exercises with sample inboxes, diaries and filing tasks from corporate, education and healthcare offices.

Course Objectives

- Distinguish the duties of a secretary from those of an office manager and define where each role starts
- Select the right channel among email, telephone and instant message for each type of office request
- Apply diary and shared calendar rules to schedule meetings for one or several executives
- Compare alphabetical, numerical and subject filing and select a classification for office records
- Apply ISO 15489 principles to name, version and retain electronic files
- Interpret daily workload on a Kanban board to prioritise and track office requests

Target Audience

- Secretaries supporting one or more executives who must decide which requests take priority in a busy day
- Administrative assistants preparing for office manager duties who must judge how office procedures should be organised
- Receptionists and front-office staff moving into secretarial roles who must decide how visitors and calls are handled
- Team assistants keeping shared files who must choose how documents are named, stored and archived
- Department coordinators arranging meetings and small projects who must judge whether schedules and tasks are realistic



Course Outline

Day 1: Secretarial Role, Office Manager Duties and Daily Organisation

- Secretary vs Office Manager: Task Support Compared With Responsibility for Office Operations
- Secretarial Duties: Diary, Correspondence, Reception and Records Responsibilities Defined
- Office Manager Duties: Supplies, Procedures, Facilities and Coordination of Support Staff
- ABC Task Prioritisation: Grading Daily Tasks as Essential, Important or Optional
- Workplace Communication Basics: Clear Requests, Confirmations and Follow-Ups With Colleagues

Day 2: Email, Telephone, Meetings and Writing Standards

- Email vs Telephone vs Instant Message: Choosing the Channel for Each Office Request
- Email Management: Folders, Rules and Response Times for a Shared Inbox
- Professional Business Writing: Tone, Structure and Proofreading for Office Correspondence
- Meeting Preparation: Booking Rooms, Agendas, Papers and Attendee Coordination
- Handling Pressure and Multitasking: Switching Between Tasks Without Losing Accuracy

Day 3: Scheduling, Visitors and Integrated Office Software

- Diary Management: Professional Scheduling Rules for One or Several Executives
- Shared Calendar vs Personal Diary: Team Visibility Compared With Individual Planning
- Client and Visitor Handling: Reception Etiquette, Greeting and Visitor Records
- Integrated Office Software: Linking Email, Calendar, Documents and Task Tools
- Kanban Task Board: Visual Tracking of Office Requests From Received to Done

Day 4: Filing, Electronic Archives and Small Office Projects

- ISO 15489: International Standard Principles for Managing Business Records in Offices
- Alphabetical vs Numerical vs Subject Filing: Choosing a Classification for Office Files
- Electronic Archive Management: Naming, Version Control, Retention and Access Permissions
- Small Office Project Coordination: Planning Events, Moves and Procurement Tasks
- Reports and Short Presentations: Presenting Office Information Clearly to Managers

Day 5: Applied Practice: Personal Productivity and the Office Toolkit

- Conflict Resolution and Negotiation Basics: Applying Communication Skills to Office Disagreements
- Working Relationships: Applying Courtesy and Reliability to Build Lasting Trust
- SMART Goals vs Vague Intentions: Applying Measurable Targets to Career Development
- Workflow Check: Applying Filing, Scheduling and Software Tools to a Case Office
- Office Essentials Toolkit: Completing a Personal Productivity and Filing Plan



Skills You Will Gain

- Diary Management
- Email Management
- Business Writing
- Records Classification
- Electronic Archiving
- Visitor Handling
- Kanban Task Tracking
- SMART Goal Setting

Why Attend This Course

- From an inbox read top to bottom to an organised mailbox with folders, rules and response times
- From files saved wherever is convenient to a classification and naming plan colleagues can follow
- From remembering tasks to tracking every office request on a visible board
- From general career hopes to an office essentials toolkit with a filing plan and SMART development goals

Conclusion

Office essentials come down to doing the daily work of a secretary in a way others can rely on and find their way through. The course makes three distinctions clear: secretary versus office manager duties, email versus telephone and instant messaging, and alphabetical versus numerical versus subject filing. It is the right choice for secretaries and assistants who want a one-week foundation before taking on office management; a two-week integrated edition suits those who need the full system in more depth.

Course FAQs

What are secretarial and office management essentials?

They are the core secretarial duties, such as diary, correspondence, reception and filing, together with the time management habits and office software skills that let a secretary organise an office and support managers reliably.

What is the difference between a secretary and an office manager in secretarial and office management?

A secretary mainly supports one or more people with diaries, correspondence and records. An office manager takes responsibility for how the whole office runs, including procedures, supplies, facilities and the coordination of other support staff.



Which standards does the secretarial and office management essentials course follow?

The course follows ISO 15489 for records management principles, a Kanban board for tracking office requests and SMART goals for setting measurable development targets, applied to everyday secretarial tasks.

Is the secretarial and office management essentials course right for a receptionist?

Yes. Receptionists moving into secretarial work learn diary management, email and writing standards, filing and visitor procedures, which are the duties most often added when a front-office role grows into a secretarial one.

What do delegates produce on the secretarial and office management essentials course?

Delegates produce an office essentials toolkit with an email folder and rule plan, diary scheduling rules, a filing classification and naming plan, a Kanban board layout and SMART personal development goals.

