

Instructional Material

English for Secretary

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Preface

This instructional material, English for Secretary, aims to provide university students with basic secretarial skills and English language skills on the job. The content of this book consists of eight chapters which are relevant to the secretarial work such as welcoming visitors, arranging business trips, dealing with appointments and answering the telephone. It is expected that students should be able to develop their language skills and be able to interact with people in the business environment effectively.

Dr. Wilailak Riach



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Course Syllabus Unit 1

Overview of a secretarial job

3 hours

Course content

1. Roles of a secretary
2. Secretarial duties
3. Vocabulary and expressions used on the job

Objectives

After completing this unit, students should be able to:

1. Realise the role of a secretary
2. Have an insight in secretarial duties
3. Apply knowledge of the secretarial job to their real life

Activities

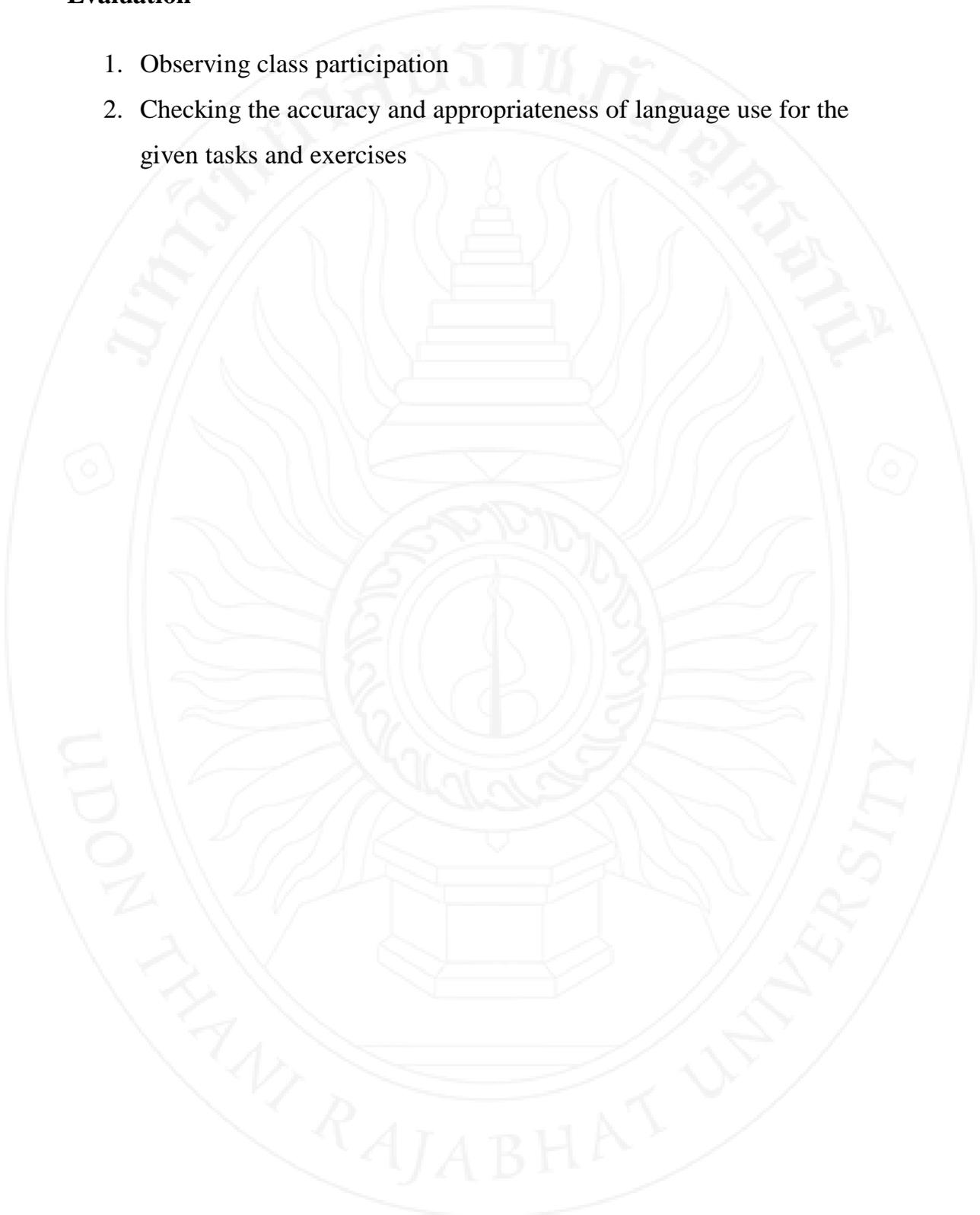
1. Lecture
2. Pair work
3. Group work
4. Role play

Teaching materials

1. Instructional materials
2. Worksheets
3. Job advertisement and articles from the internet

Evaluation

1. Observing class participation
2. Checking the accuracy and appropriateness of language use for the given tasks and exercises



Unit 1

Overview of a secretarial job



Warm up questions

1. Do you think a secretary is one of the important jobs in business organisations? Why?

.....
.....
.....

2. What are the main duties of a secretary?

.....
.....
.....

Exercise 1

Instructions: Tick (X) in front of job duties that do not belong to a secretary

Job duties of a secretary	
..... keep the shop clean and tidy	..... conduct market survey
..... maintain office supplies	..... file and keep records
..... handle customer payments	..... give financial advice
..... develop business strategies	..... arrange meetings
..... prepare memos and reports	..... greet and welcome visitors
..... recommend products to customers	..... deal with telephone calls
..... deal with customer satisfaction	..... recruit new staff
..... make travel arrangements	..... make appointments
..... deal with letters and emails	..... distribute incoming mails
..... book accommodation	..... set up new businesses

Key vocabulary

Verb+ Noun Collocations
- make travel arrangements
- arrange meetings
- prepare itineraries and agendas
- deal with correspondence
- handle telephone calls
- keep records
- maintain office supplies
- receive visitors
- make appointments
- take minutes
- attend meetings
- book accommodation

Introduction

According to Wiktionary, the word 'secretary' comes from Latin word 'secretarius' which means a confidential clerk or secretary. A secretary is the one who keeps secret files or documents of a company. A company secretary can be referred to as a private secretary, a department secretary, an administrative assistant, a personal secretary, a secretary to the management, a senior secretary or an executive secretary. According to Stroman, Wilson & Wauson (2014), being a secretary is regarded as one of the most important

positions in any company. Apparently, a secretary is hired to relieve the working load of a busy employer. Her job is to make it easier for the management to do the really important work. Therefore, a good secretary requires versatility, skill, precision, efficiency, and a constant willingness to increase one's knowledge.

Qualifications of a secretary

A secretary has a multi-role to play in a business workforce. For instance she acts as a receptionist when receiving visitors, a telephone operator when making or receiving calls, a filing clerk when filing the documents or an administrative assistant when handling business correspondence. The most important thing is she has to get things done. Therefore, certain qualities are required for a secretarial role.

According to Murthy & Nagasubramanian (2007), a good secretary should

- be dedicated to the organisation and its goals
- have a propensity for hard work
- be adaptable to change
- harmonize with subordinates
- be able to communicate
- be self-controlled
- have the ability to act consistently
- direct her energy to constructive achievement
- have to the ability to multiply the effectiveness of herself and her boss

Job Advert 1

Office Secretary/(Female)/karachi office

Qualification: Graduate

Experience: Minimum 3-5 Years

Well groomed, fluent in English, efficient handling of office work with effective communication skills, Computer literate with sound knowledge of MS Office, Outlook etc.

(E-mail CV to hanan.saghree@csg-pk.com by 10 Sept, 2011.)

(Source: www.google.com)

Exercise 2

Read Job Advert 1 and write qualifications that a secretary should possess in the chart below.

Qualifications of an office secretary

-
-
-
-
-
-

Job Advert 2

REQUIRED EXECUTIVE SECRETARY

A well reputed company in Gujranwala needs to hire an EXECUTIVE SECRETARY with the following capabilities.

- Candidate must have a Masters degree.
- Having minimum 6-8 year experience in relevant field from a well reputed Organization.
- Candidate must have excellent written / verbal communication skills.
- To Organize & Maintain CEO's office & plan / assist him in time management regarding his scheduled commitments. To handle day-to-day office / routine work efficiently including drafting minutes of meeting, memos, diary management, general secretarial and administrative services.

We offer market-based compensation and a modern work environment with excellent growth prospects. Interested candidates who fulfill the above mentioned criteria are requested to submit their application by **02 July 2012 c/o Daily Nawa-i-Waqt Box No. 952 , Lahore.**

Please mark the position applied for on the top of the envelope.

PID (L) 3375

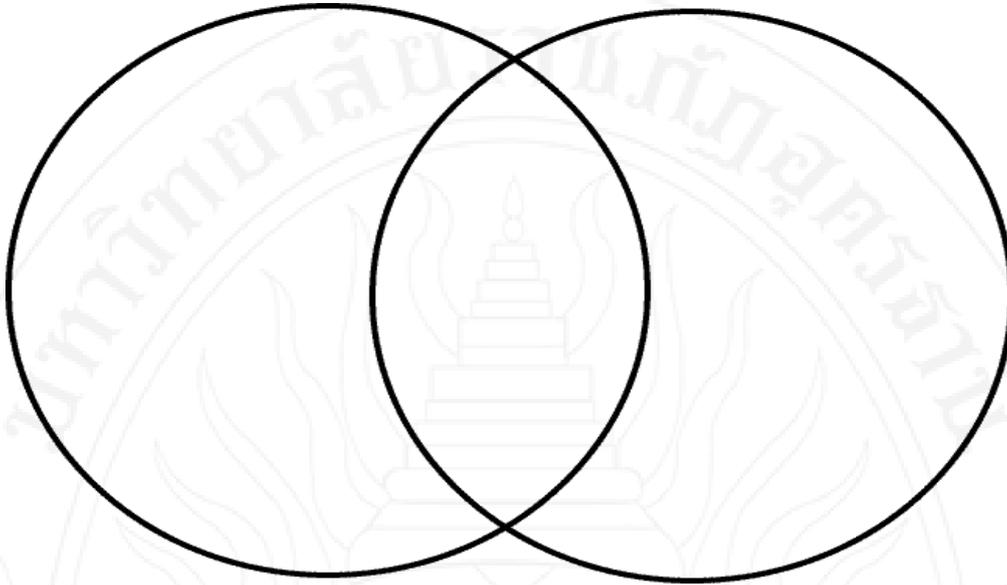
(Source: www.google.com)

Exercise 3

Instructions: Read Job Advert 2 and write down the similarities and differences of job duties between an office secretary and an executive secretary.

Office secretary

Executive secretary



Roles of a secretary

In a business organization a secretary is regarded as an important figure. He/she has a key role to play for instance providing a vital link between the executive and their various contacts, ensuring that communications are effective and the required action is taken (Murthy & Nagasubramanian, 2007). Duties assigned to a secretary might vary from organisation to organisation or from department to department. However, there are general duties that a secretary has to perform in the workplace. Examples of common secretarial duties are as follows:

- Handle all correspondence and enquiries
- Receive and assist visitors
- Make travel arrangements and plan itineraries
- Read and sort incoming mails

- Maintain and organise filing systems
- Take minutes at company meetings
- Make appointments
- Handle telephone calls
- Attend meetings in place of supervisor and report activities that took place
- Organise meetings and special events as required
- Control stationery and maintain office equipments

Exercise 4

Instructions: Work in groups. Read the following qualifications of a project secretary below. Then discuss with your peers and answer the following questions.

Key job qualifications for project secretary

1. High school diploma and five years' experience as an administrative assistant
2. Able to perform responsibilities with a high level of professionalism, accuracy, tact and integrity due to the great frequency of internal and external contacts and the high degree of exposure to confidential data.
3. Strong interpersonal, teamwork, organizational and communication skills.
4. Detailed oriented, forward thinking and proactive.
5. Excellent written communication and document production skills required.
6. Willingness and ability to work overtime when needed.
7. Prior legal experience and prior experience working with senior level executives preferred.
8. Experience with contracts and human resource/labor matters highly desirable.
9. Expert in Word and Outlook software packages or demonstrated computer skills with comparable software.
10. Familiarity with Microsoft Excel, Power Point and general computer literacy also required.

(Source: www.google.com)

1. In your opinion, why does a project secretary have to have excellent written communication skills?

.....

.....

.....

.....

.....

.....

.....

2. What kinds of documents does a project secretary have to handle on the job?

.....
.....
.....
.....
.....
.....

3. Why is it necessary for a project secretary to have teamwork skills?

.....
.....
.....
.....
.....
.....

4. A detail-oriented person is one of the key qualifications for a project secretary. Can you think of 5 things that a detailed oriented secretary would do for the job?

1.
.....
2.
.....
3.
.....

4.
.....
5.
.....

Language practice

Exercise 5

Instructions: Underline words from the list that goes best with the word given.

1. *distribute / compose / attend* meeting
2. *practice / keep / do* records
3. *perform / handle / contact* telephone calls
4. *prepare / make / welcome* visitors
5. *reply / make / order* business letters
6. *maintain / take / make* minutes
7. *use / arrange / attend* travel arrangements
8. *do / make / connect* appointments
9. *coordinate / deal with / meet* memos and emails
10. *make / organise / transfer* conferences
11. *book / take / plan* itineraries
12. *maintain / welcome / make* office equipments

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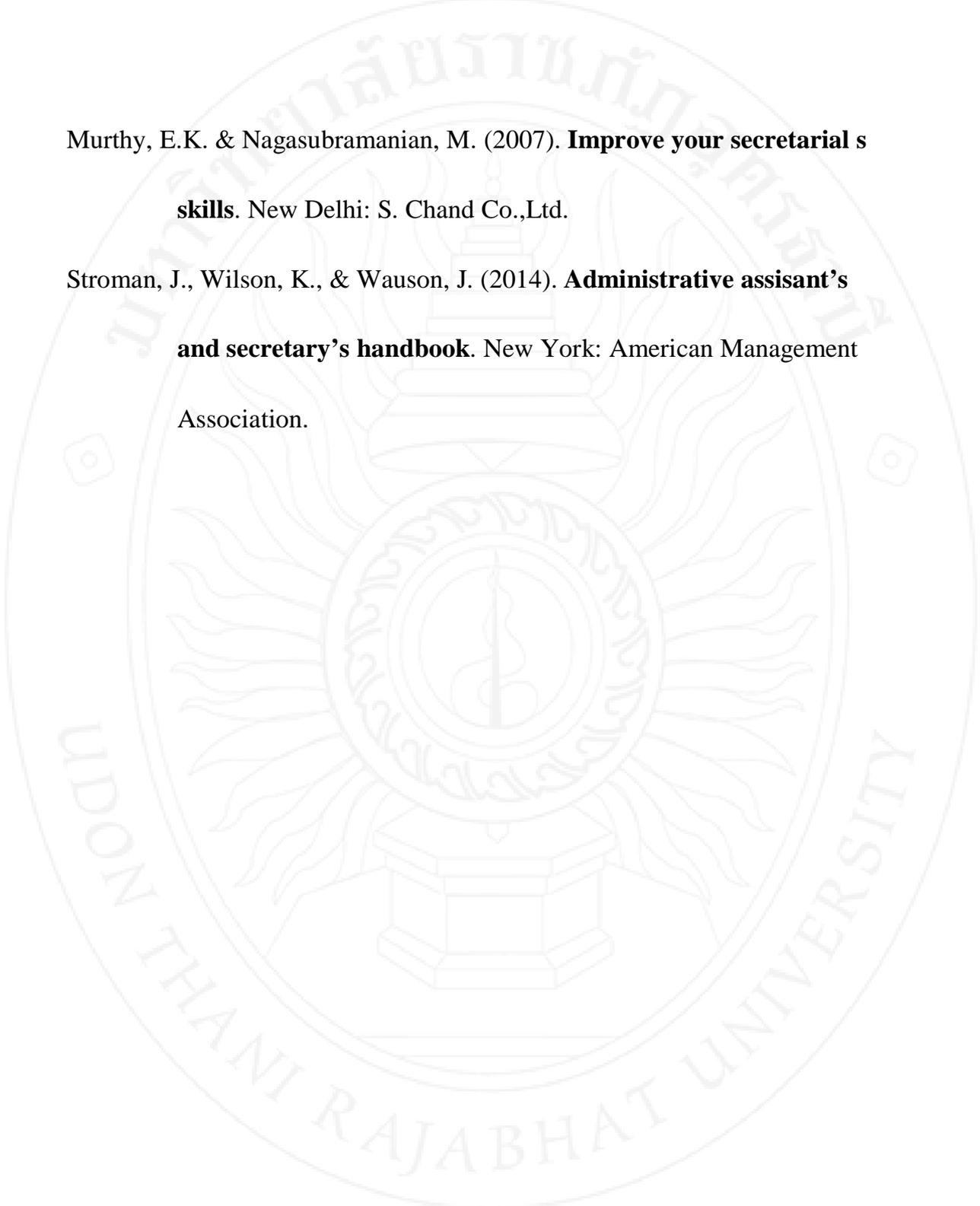
Murthy, E.K. & Nagasubramanian, M. (2007). **Improve your secretarial s**

skills. New Delhi: S. Chand Co.,Ltd.

Stroman, J., Wilson, K., & Wauson, J. (2014). **Administrative assisant's**

and secretary's handbook. New York: American Management

Association.



Course Syllabus Unit 2

Welcoming visitors

3 hours

Course content

1. Meet and greet visitors
2. Small talk
3. Cultural differences

Objectives

After completing this unit, students should be able to:

1. Greet and welcome visitors in business situations
2. Conduct small talk while receiving visitors
3. Be aware of cross-cultural differences when interacting with people from different cultures

Activities

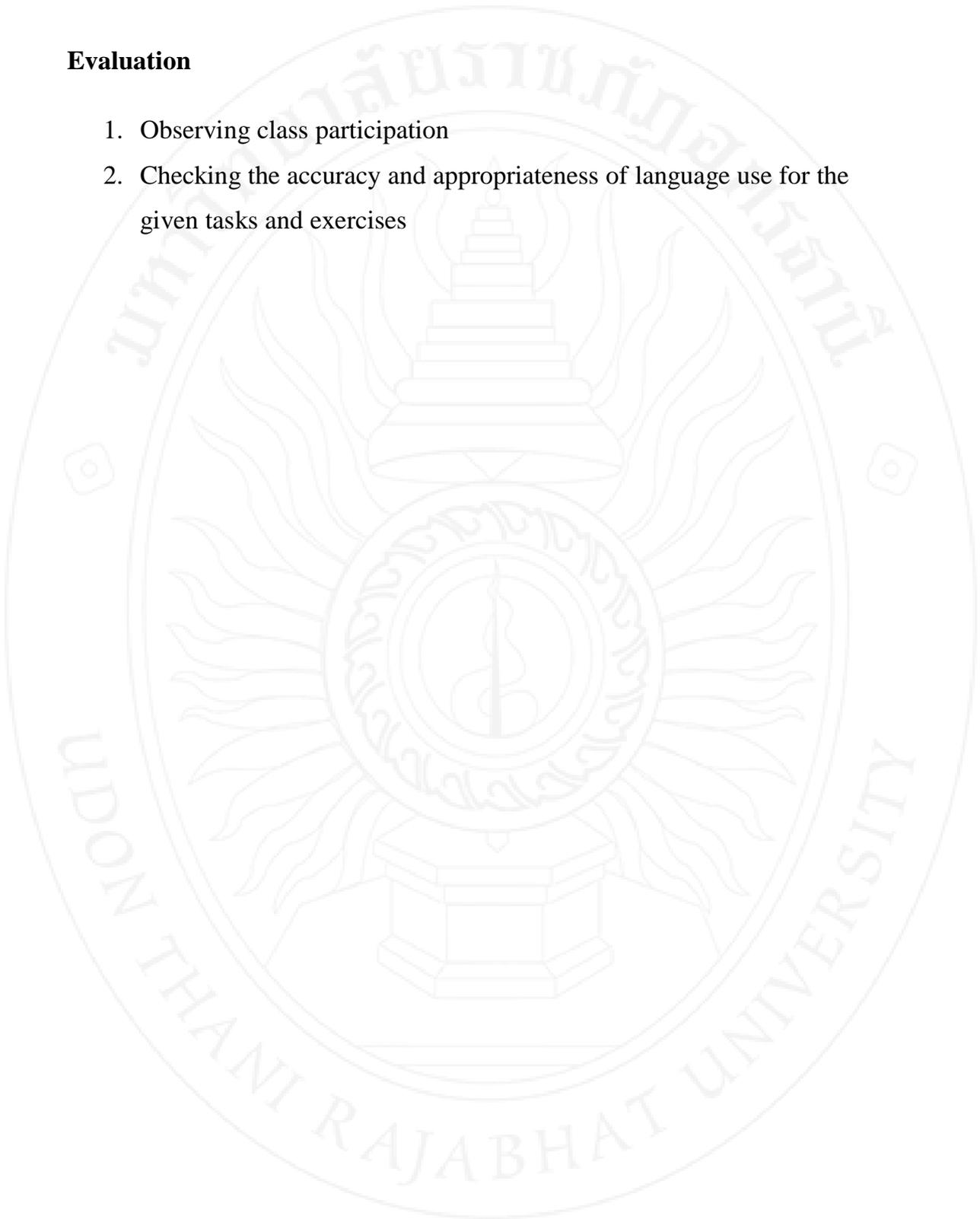
1. Lecture
2. Pair work
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4. Role play

Teaching materials

1. Instructional materials
2. Worksheets
3. Articles from internet

Evaluation

1. Observing class participation
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Unit 2

Welcoming visitors



Warm up questions

1. Do you like meeting new people? Why?

.....
.....
.....

2. What characteristics are required for a secretary to welcome visitors?

.....
.....
.....
.....

Key vocabulary

Verb + Noun Collocations

- greet visitors
- receive visitors
- welcome visitors
- introduce yourself
- identify yourself
- show visitors around
- give directions to visitors
- offer help to visitors
- provide information to visitors
- make visitors feel at ease
- provide supports to visitors

Introduction

Dealing with people on behalf of the executive is part of a secretary's daily routine in the workplace. Her job includes receiving visitors and offering assistance. The first important thing to do when welcoming visitors is to greet them and introduce yourself (Millan & Toselli, 1997). It is essential for a secretary to treat visitors with respect and be polite to them. Proper forms of polite expressions should be used when talking to visitors, such as please, would you mind, would you like.

Interacting with people from different cultural backgrounds is also not easy. Obviously, this requires some skills such as courtesy, patience, sensitivity, tact, and the ability to get along well with people (Murthy & Nagasubramanian, 2007). Non-verbal communication skills definitely play a major role when communicating with foreigners. Maintaining eye contact is essential when talking to foreigners. In western countries such as the United States, people who avoid eye contact are generally regarded as unfriendly, insecure, untrustworthy, inattentive and impersonal (Sweeney, 2003).

Language function

Followings are common language function that can be used when receiving visitors in the business context.

1. Greeting visitors

- Good morning. My name is I'm Mr. Joe's secretary.
- Hi, I'm It's a pleasure meeting you.
- You must be Mr. Nice to meet you. I'm
- Welcome to our company. I'm
- I don't think we have met. I'm

2. Offering help

- Please take a seat while you are waiting.
- Can I get you something to drink?
- Would you like something to drink?
- Would you like a cup of coffee or tea?
- How would you like your coffee?
- Do you need anything?

3. Locating visitors

- Can I have your name please?
- Do you have an appointment?
- May I ask whom you wish to see?
- What is the purpose of your visit please?

4. Managing waiting visitors

- One moment please.
- One second please.
- Would you mind waiting for a few moments?
- I'll let Mr. Tony know you are here.
- Mrs. Laura will be here shortly.
- Mr. Howard will be with you in a minute.
- I'm afraid Dr. Lloyd is in a meeting right now. It should not be long.

5. Showing visitors around

- This way please.
- Follow me please.
- Please come with me.
- I'll take you to the president's office.
- I'll show you around our factory.

6. Giving visitors directions

- Mr. Martin's office is on the 5th floor. It's the second office on the left.
- Keep walking this way. The Human Resources Department is on your right.
- The Meeting Room 3 is on the 2nd floor.

- The Marketing Dept. is on the 8th floor opposite the Sales Department.
- You need to go upstairs. The conference room is on your left.

Grammar Focus

1. Polite expressions

When interacting with visitors or business partners in the workplace it is essential for a secretary to use polite language at all times. Polite remarks commonly used in business transactions include please, may, would you mind.

For example

- One moment **please**.
- **Please** take a seat.
- **Plasesit** down.
- **Please** follow me.
- This way **please**.
- Can I have your company name **please**?
- **May** I know your name **please**?
- **May** I know the purpose of your visit **please**?
- **Would you mind** waiting for a second?
- **Would you mind** waiting for a moment?

2. Present Future Tense

When you would like to offer something or talk about something that will happen in the near future, you should use the present future tense.

The structure of the present future is: Subject + will + verb

For example:

- I will show you around.
- I will take you to the Vice President's office.
- Mr. Josh will be with you in a minute.
- I will let Mr. Frank know you are here.
- Please take a seat. I will check if she's in.
- Miss Linda will be with you shortly.

Language practice

Exercise 1

Instructions: Match the expressions in column A with the appropriate responses in column B

Column A

1. Can I have your name please?
2. Would you like something to drink?
3. Would you mind waiting for a second?
4. Mr. Ramos will be here shortly.

Column B

- a. Coffee would be nice.
- b. I don't like it.
- c. I'm Jason from Nano Tech.
- d. Yes. I'm coming to see Mr. Henry Toselli.

5. Do you have an appointment?

e. No, thanks. I'm fine.

6. Would you like a cup of tea?

f. Thanks.

g. No, not at all.

h. I'll talk to you later.

i. I really enjoy it.

Exercise 2

Instructions: Rewrite the following phrases or sentences by using polite expressions such as can, could, would, please, may.

1. Sit down.

.....

2. Your company name?

.....

3. Something to drink?

.....

5. Follow me.

.....

6. Why are you here?

.....

7. Anything else?

.....

8. Can you wait?

.....

9. One moment.

.....

10. Yes.

.....

11. Tea?

.....

12. I want to see Mr. George.

.....

Exercise 3

Instructions: Fill in the blanks with the appropriate prepositions given below.

in for at opposite on with to of

1. Mr. George will be you shortly.
2. I'll take you the Vice President's office.
3. Would you mind waiting a moment?
4. The meeting room is your left.
5. The Human Resources Dept. is the 7th floor.
6. Miss Sarah will see you a minute.
7. The Production Dept. is the Purchasing Dept.
8. Dr. Simkin is the phone. He'll be available soon.

9. Welcome our company. My name is Waree. I'm Mr. Jason's secretary.

10. Mr. Roy is a meeting right now. One moment please.

Small talk



Warm up questions

1. In your opinion what is small talk?

.....
.....
.....

2. Is it necessary to have small talk in the workplace?

.....
.....
.....

Introduction

Small talk is the conversation about unimportant things often between people who do not know each other well. Small talk is considered useful and necessary when meeting visitors for the first time. The main aim is to make the visitors feel at ease, especially when they are in a new environment (Millan & Toselli, 1997). Moreover, small talk helps develop good relations and a good atmosphere (Sweeney, 2003). Universal topics that can be used to start up the conversation when receiving visitors include the weather, the trip, sports, accommodation, places, meals, the native country and the host country. However, it is essential to keep in mind that in order to help visitors to feel comfortable, the topics chosen have to be general and not too personal. To make a successful small talk, the cultural backgrounds of the visitors should be taken into account.

Safe topics for small talk

When you want to start a conversation with visitors in the workplace, it is important to use topics that the visitors feel comfortable with. The topics should not be too heavy or too personal. For example:

1. Talking about a trip

- How was your trip?
- Did you have a nice trip?
- Did you have a good trip?
- How was your flight?

2. Talking about places

- Have you been here before?
- What do you think of Chiangmai?
- Is this your first time in Bangkok?
- Do you have time to look around the city?

3. Talking about food

- Do you like Thai food?
- Do you like western food?
- Do you like spicy food?
- What kind of food do you like?

4. Talking about accommodation

- How is your hotel?
- Is it comfortable?
- Where are you staying?
- Is it far from here?

5. Talking about transportation

- How did you get here?
- Was it difficult to find our place?
- I hope the traffic is not too bad for you.

Small talk dialogues

Dialogue 1

A: Did you have a good trip?

B: The flight was delayed a bit but it was not too bad.

Dialogue 2

A: Did you find your way here all right?

B: Actually, there was no problem at all. The directions you gave me were very clear.

Dialogue 3

A: How's the hotel? Is it ok?

B: It's quite comfortable thanks.

Dialogue 4

A: Can I get you something to drink?

B: Yes, please. Tea would be nice.

Dialogue 5

A: Is this your first time in Bangkok?

B: No, it was my third time actually.

A: How about the food here? Do you like it?

B: I love it. I love spicy food.

A: Oh I'm glad to hear that. I hope you enjoy your stay here.

Dialogue 6

A: What was the weather like in London? Was it cold?

B: Yes. It is much colder than here and it's quite windy.

A: I hope you don't mind the heat here. It has been raining quite a lot as well.

Dialogue 7

A: What do you think about Chiangmai? Do you like it?

B: Yes, quite a lot. It's a beautiful city and the people are very nice and friendly.

Unsafe topics for small talk

In real life situations making small talk is not always easy. It is not just about asking questions and getting a prompt response. There are some topics that you should avoid when talking to foreigners or people from different cultural backgrounds. For instance, talking about politics can be controversial as people have different beliefs or viewpoints. Also, talking about religion can be regarded as being too personal. This therefore requires some practice and some understanding of intercultural differences. If you are not confident about making small talk, you should observe people who are confident speaking English and you should listen and note the questions they ask. Moreover, you should keep practicing, as the more you say the more you will feel confident about making such conversation (Gore & Smith, 2011).

Language practice

Exercise 4

Instructions: Put the following topics either in the left or right column.

salary, weather, news, sports, politics, food, marital status,
 religion, appearance, jewellery, wealth, accommodation,
 age, trip, food, places

Safe topics for small talk	Unsafe topics for small talk

Exercise 5

Instructions: Match the sentences or questions in column A with the answers in column B.

Column A

1. Did you have any problems finding this place?
2. Is this your first time in Sydney?
3. Traffic is never good around here.
4. What do you think of Bangkok?
5. How is your hotel?
6. Do you like Thai food?
7. Where are you staying?
8. How was your trip?

Column B

- a. I agree.
- b. Not too bad.
- c. It's quite hot but the people are very nice.
- d. Not really. I searched on the internet so it was pretty easy to find.
- e. Actually this is my fourth time.
- f. Very nice. The room service is very good.
- g. I would love to visit Udonthani.
- h. At the Amari.
- i. Yes, I love it.
- j. I like winter. Do you?

Grammar Focus

Past Simple Tense

When you want to talk about completed actions, situations, or events in the past, you should use the past simple. The structure of the past simple is

Subject + past form of verb

For example:

- It was a wonderful trip.
- It was a good day.
- It was quite a long trip but I had some sleep on the plane.
- I searched on the internet so it was quite easy to find.
- The flight was delayed a bit but everything was ok.
- How was your flight?

If you want to ask questions, you can begin your sentence with 'did'.

For example:

- Did you have a good trip?
- Did you find your way here all right?
- How did you get here?

Language practice

Exercise 6

Instructions: Choose the correct verb form.

1. I have/ had a wonderful trip.

.....

2. How do/did you get here?

.....

3. When I leave/left Chicago, the weather is/was very cold.

.....

4. It is/was a long flight but it is/was ok.

.....

5. Is/was it a direct flight?

.....

6. I have/had some sleep on the plane so I am/was not too tired.

.....

7. I visit/visited Nongkai 2 years ago.

.....

8. Do/did you enjoy your trip?

.....

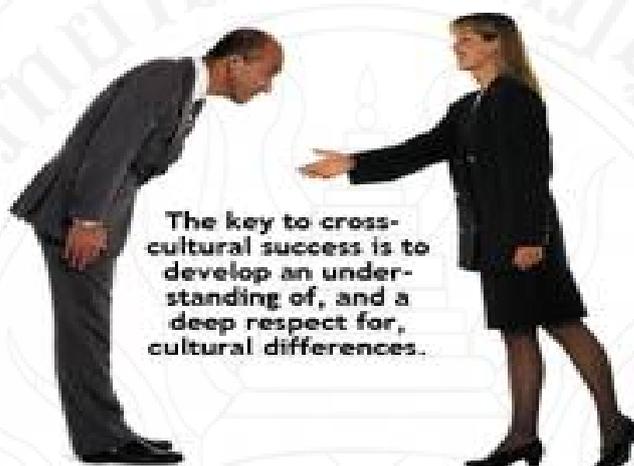
9. I go/went to Hua Hin last month.

.....

10. I come/came here by taxi. It is/was quite quick.

.....

Cultural focus



In business settings, a secretary usually deals with people from various cultures. Obviously, culture is an important influence that shapes the way people talk or act. That is the reason why people from different cultures communicate differently. Moreover, nonverbal communication that people use when they talk is also different among cultures. How you greet people depends on many factors such as your nationality and culture, how well you know the person you are greeting, your age, and your gender (Walker & Harding, 2011). It is important to be aware of these cultural issues before interacting with people. In a friendly and informal context, people might call each other by using nickname or first name and they might kiss or hug each other. However, in a more formal context, people might call each other by using last name and they tend to shake hands when they first meet. Therefore, it is wise for a secretary to be aware of cultural values and try to use appropriate verbal and nonverbal communication when dealing with visitors.

Followings are comments about cultural issues from people from different countries. While you are reading, try to compare what you read to your own culture.

Anna

First names are tricky. Everyone's so concerned about intercultural awareness these days that often you have Americans greeting their French counterparts as 'Mr. Delatour and 'Ms. Lagrange', while the French call the Americans 'Bob' or 'Mary' the first time they meet. But on the other hand, hardly anyone is shocked any more if you don't do what would be normal in 'their' culture.

Alex

Visiting companies in the US is always very stressful. People often make little jokes, and I know they're trying to be friendly, but often I don't understand what they mean and then I look like an idiot. I'm sure they think of me as the serious Swiss guy. It's really frustrating.

Dominic

Coming from Europe, I'm used to being offered a cup of coffee or tea when I visit someone at their company. Perhaps a juice. But I was astonished to arrive at a business colleague's office in Delhi and find a full lunch waiting for me. Have you ever heard of such a thing? I'm not complaining, of course; the food was delicious. I don't know what we'll do if the Indian colleague ever visits us!

Yoko

When you visit someone in a hierarchy-obsessed culture like Japan, it's very easy to tell exactly how important you are to them. Does your counterpart introduce you to her colleagues? O.K, not too bad. Does she introduce you to her boss? All right, you can't be that unimportant. And her boss's boss – well, clearly you're someone they are very interested in! But if she doesn't introduce you to anyone, well, that's definitely a bad sign. Japanese people love making introductions.

Source: Gore & Smith (2011, p. 22)

Exercise 6

Instructions: Work in groups and discuss the following issues.

1. Summarize the point that each person makes and find out the native country of each person.

Names	Main points	Country
Anna		
Alex		
Dominic		
Yoko		

2. Discuss with your peers whose comments are similar to or different from your own culture.

Names	Similarity	Differences	Other issues
Anna			
Alex			

Dominic			
Yoko			

3. Do you think these comments about cultural issues are useful to you? Why?

.....

.....

.....

.....

.....



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Course syllabus Unit 3

Arranging business trips

6 hours

Course content

1. Flight reservations
2. Hotel reservations
3. Travel itinerary
4. Money currencies

Objectives

After completing this unit, students should be able to:

1. use appropriate phrases to make a reservation for hotels and air tickets.
2. write a business travel itinerary
3. recognize money currencies used in other countries

Activities

1. Lecture
2. Role-plays
3. Pair work/group work
4. Group discussions

Teaching materials

1. Instructional materials
2. Worksheets

Evaluation

1. Observing class participation
2. Checking the accuracy of given tasks and exercises



Unit 3

Arranging business trips



Warm up questions

1. List 5 important things that a secretary should do when organising a business trip for the executive.

.....

.....

.....

.....

2. In your opinion, what kinds of problems are likely to be occurred when arranging a business trip?

.....

.....

.....

.....

Key vocabulary

Verb + Noun Collocations
- organise a trip
- arrange a trip
- book a hotel
- book an air ticket
- contact airline staff
- contact travel agent officer
- confirm flight details
- confirm hotel rooms
- make a reservation
- arrange an airport pickup
- prepare an itinerary

Introduction

These days, companies or business organizations are conducting business across the country and all over the world. People travel all the time. They might travel to promote their products, meet customers or offer new services. Therefore, business-related travel is very common for every size of company (Stroman, Wilson & Wauson, 2014). The main task of a company secretary is to plan for business trips for the management (Harrison, 2011). Her

job is to make a reservation for transportation, accommodation or business activities for his/her employer.

Before arranging a business trip for the executive, there are particular details that a secretary should have in hands. For example:

- What is the purpose of the trip?
- When and where does the event take place?
- Which airline should be chosen?
- What is the suitable place to stay?
- Is the room available during the event?
- What is the best way to reach the destination?
- Will the manager be travelling alone, or will staff members be travelling also?
- Is a visa required for the particular country?

Flight reservations

The ability to handle flight bookings promptly and effectively is a must for a good secretary. Airline tickets can be booked online or by telephone via a travel agency or airline reservation office. For booking airline tickets, a secretary has to make sure that she has all the information of the travellers in hands e.g. passport number, date and time of departure, city/country or credit card details.

In case the management has to travel to a big city such as New York or London, the secretary has to carefully check which airport is closest to the destination or which airport his/her boss may prefer. This information is required when booking an airline ticket. In London there are five major airports to consider, such as Gatwick, Heathrow, Stansted, City and Luton Airports.

New York has three main airports: John F. Kennedy, Newark and La Guardia Airports.

When booking a flight, especially an international flight, it is important for a secretary to check the airline availability and be familiar with the airline codes. Followings are the samples of domestic and international airlines codes.

Domestic Airlines	Code	International Airlines	Code
Bangkok Airways	PG	Air France	AF
Lion Air	SL	Air India	AI
Nok Air	DD	All Nippon Airways	NH
Thai AirAsia	FD	American Airlines	AA
Thai Smile Airways	WE	British Airways	BA
		Cathay Pacific Airways	CX
		China Airlines	CI
		Delta Airlines	DL
		Garuda Indonesia	GA
		Japan Airlines	JL
		Korean Air	KE
		Northwest Airline	NW
		Qantas Airways	QF
		Scandinavian Airlines	SK
		Singapore Airlines	SQ
		Thai Airways International	TG
		United Airlines	UA

Seating class is another issue that a secretary needs to determine when booking an international flight. It is wise for a secretary to check with his/her manager whether he or she prefers first class, business class or economy class. During high season, such as New Year or Christmas, the seating preference of particular airlines can be limited or in some cases all seats might be full. Therefore, it is essential for the secretary to carefully plan and book the air ticket in advance. Moreover, for some trips the management might have to transfer to a domestic airline. Time difference also needs to be taken into consideration, so that the management does not have to spend too much time waiting at the airport.

Sample dialogues

Followings are dialogues between a secretary (S) and a travel agent staff (T)

Dialogue one

- T: Good morning. How can I help you?
- S: Good morning. I would like to book a flight to New York please. Do you have any direct flights?
- T: Yes, we do. When do you want to travel?
- S: 4th August
- T: Do you want a return ticket?
- S: Yes, please. 7th August.
- T: Which airline would you like to use?
- S: British Airways would be nice, thanks.

- T: Let me see.....OK we have BA117 leaving London on 8.30am on 4th August and the arrival in New York will be 11.30am local time. On 7th August the flight leaves New York at 18.30pm and will arrive in London at 6.15 8th August.
- S: That sounds good.
- T: Would you like economy, business class or first class ticket?
- S: Business class please.
- T: Ok. Can I have the passenger's name please?
- S: Charles Parker
- T: Would you like a window seat or an aisle seat?
- S: Aisle seat please.
- T: I have booked the flight for you already. The price is \$890. You need to pay before July 15th.
- S: Thanks.
- T: Is there anything else I can do for you?
- S: No, that's all. Thank you.
- T: Have a nice day.

Source: adapted from bbclearningenglish.com

Grammar Focus

Polite expressions

When contacting an airline company or travel agency to check flight details or book a flight, it is appropriate to use polite expressions such as please, can, would, could, may. For example:

- I would like to book a flight to Tokyo please.
- Can I book a flight to Auckland, New Zealand please?
- May I have your passport number please?
- Can I have an aisle seat please?
- Can I take a morning flight please?
- Could you check the airfare of Thai Airways to from Bangkok to Toronto please?
- I need 3 tickets to Hong Kong please. How much will that be?

Language practice

Exercise 1

Instructions: Read the following expressions and decide whether these sentences belong to a secretary (S) or a travel agent staff (T)

1. I would like to book a flight to Tokyo please.(S/T)
2. Do you want to go first class, business class or economy class? (S/T)
3. Do you want return or one way? (S/T)
4. When do you want to go? (S/T)
5. What time does the flight leave Melbourne? (S/T)
6. Can I have an aisle seat please? (S/T)
7. Is it a direct flight? (S/T)
8. Which airport would you prefer Los Angele or Burbank? (S/T)
9. Would you prefer a morning or evening flight? (S/T)

10. How many of you will be travelling? (S/T)
11. Can I take a morning flight please? (S/T)
12. We have only one seat left for business class. (S/T)
13. What is the price difference between the morning and evening flights?(S/T)
14. I need 2 tickets to Berlin, Germany. How much will that be? (S/T)
15. I think I might have to book economy class. (S/T)
16. Your departure date is 10th May and the flight time is 6.30am. (S/T)
17. Thai Airways is more expensive than Air India, but it is a direct flight.(S/T)
18. Is there anything else that I can help you with? (S/T)

Exercise 2

Instructions: Match the following words with their meanings.

domestic flight, aisle seat, return ticket, depart, airfare, luggage, arrive, first class, boarding time, stopover, carry on luggage, one-way ticket, destination, delayed visa

1.	- a flight to a destination and back to the original departure point
2.	- leave, take off
3.	- happening at a later time than expected or intended

4.	- the small piece of hand luggage that you are allowed to take with you onto the plane
5.	- a single flight between two destinations
6.	- a special document that gives you permission to enter a country
7.	- the place where someone is going
8.	- the bags and suitcases that a person carries when travelling
9.	- a brief period of time when you stop at a place during a journey
10.	- a flight where the departure and the arrival take place in the same country
11.	- a seat on the plane at the end of the row, adjacent to the aisle
12.	- the money a person pays to travel on an airplane
13.	- the most expensive area of the plane. There is a lot of space to move.
14.	- the time that people will be allowed to start entering the plane

Hotel reservations

Accommodation is an important issue to think about when arranging a business trip for the management. After booking an airline flight, a secretary has to carefully plan where the management is going to stay. There are a few factors to keep in mind when booking a hotel. For example:

1. Location of the hotel

- Is it in the city center or the suburbs?
- Is it convenient to get access to public transportation, dining areas or business sites?

2. Room type

- Is the room spacious and comfortable?
- Does it have a working area?

3. Facilities and business amenities

- Does it offer business center operations and have available office equipment?
- Does it have reliable internet access?
- Does it have an airport pickup facility?

As there are many different kinds of hotels in each country, it is essential to check the preference of the management regarding the type of room and the location. The boss might be a member of a chain hotel operating all over the world. The booking can be done by phone or online booking. These days online booking is very convenient. It can be done via hotel websites which are available 24 hours.

Sample dialogue

Below is a conversation between a secretary (S) and a hotel staff (T)

Dialogue one

H: Good morning. The Grand Pacific Hotel. May I help you?

S: Hi, good morning. I'd like to make a reservation for the third weekend in September. Do you have any vacancies?

H: Yes Ma'am, we have several rooms available for that particular weekend.

And what is the exact date of your arrival?

S: The 24th.

H: How long will you be staying?

S: Two nights please.

H: How many people is the reservation for?

S: There will be only one.

H: And would you like a room with twin beds or a double bed?

S: A double bed thanks.

H: All right. And would you prefer to have a room with a view of the ocean?

S: An ocean view would be nice. What's the room rate please?

H: Our room rates recently went up. Is that okay with you?

S: How much per night are we talking about?

H: Each night will be \$218.

S: That's fine.

H: O.K. Do you prefer smoking or nonsmoking room?

S: Nonsmoking please.

H: Now what name will the reservation be under?

S: James Morgan.

H: Could you spell it for me, please?

S: Sure. M-O-R-G-A-N

H: And is there a phone number where you can be contacted?

S: Yes, my cell phone number is 554-26386.

H: Thanks. Now I'll need your credit card information to reserve the room for you. What type of card is it?

S: Visa card. The number is 987654322011.

H: And what is the name of the cardholder please?

S: James W. Morgan.

H: Alright Ma'am. Your reservation has been made for the twenty-fourth of September for a room with a double bed and view of the ocean. Check-in is at 2 o'clock. If you have any other questions, please do not hesitate to contact us.

S: Thank you very much.

H: My pleasure. Have a nice day Ma'am.

Source: adapted from <http://www.vocabulary.cl/Lists/HotelDialogues.htm>

Grammar Focus

Asking for hotel information

When contacting hotel staff to ask for details about a room, typical questions that you can use are as follows:

- Do you have any vacancies?
- What is the room rate?
- Can I have a non-smoking floor?
- Do you have internet access in the room?
- Is the room available from 13th to 17th May?

- Do you provide office equipment for business travellers?
- How much do you charge for airport pickup?
- Do you have a special rate for membership?
- Are there any cancellation fees for a hotel booking?
- How much do you charge for late check out?

Language practice

Exercise 3

Instructions: Read the following expressions and analyse whether these sentences belong to a secretary (S) or hotel staff (H)

1. I would like to reserve a room for Mr. Michael Yoshida.(S/H)
2. Do you prefer smoking or nonsmoking room?(S/H)
3. From June 10th to June 14th. (S/H)
4. When do you require the room please?(S/H)
5. Would you like a double bed or twin beds?(S/H)
6. My phone number is 085 627 1148.(S/H)
7. Thank you so much for choosing our hotel.(S/H)
8. It's \$298 per night.(S/H)
9. Your reservation is confirmed. The reference number is NJ087. (S/H)
10. I need the room for 3 nights.(S/H)
11. What day will you be arriving?(S/H)
12. Could I have the full name of the guests please?(S/H)

13. Can I have a double bed please?(S/H)

14. For how many people please?(S/H)

15. Let me repeat that: 085 6271148. Is that correct? (S/H)

16. Your reservation is all set.(S/H)

17. Sure. George Simons.(S/H)

18. Non-smoking room please.(S/H)

Business travel itinerary

Once all the booking details e.g. airline ticket and accommodation have been confirmed, the next thing for a secretary to prepare is a travel itinerary or written travel agenda. Important details to be included in the travel itinerary are as follows:

- Airline tickets and airport details
- Hotel reservations
- Business appointment details
- Rental car confirmations
- Restaurant reservations
- Car pickup details
- Name and phone number of the contact person overseas

The completed business travel itinerary is useful for both an executive and a secretary as it can be used as a reference. The secretary can tell exactly where the boss can be contacted. The boss can have a clear picture about all business activities that he will be dealing with or whom he will visit. Then he can plan the matters for discussion. This can make the business trip more fruitful. A sample business travel itinerary is as follows:

James Morgan Itinerary

Monday 26 May 2018 (Dallas to New York)

- 6:00am Leave Dallas hotel by hotel limousine to the Dallas Fort Worth International Airport
- 8:00am Leave DFW Airport on American Airlines flight AA544 Seat 16a. (ticket attached)
- 11:20pm Arrive at JFK Airport (pick up by Mr. Steven King from Henkel Co., Ltd.)
- 12:00pm Lunch at Shinobu restaurant with Sales Director
- 2:00pm Meet Henkel executives and discuss new collaboration projects.
- 4:00pm Check in at Holiday Inn Hotel

Tuesday 27 May 2018

- 9:00am Meet Carl Sullivan, Vice President of Cabana, Empire State Building, 37th floor, Room 3710
- 11:00am Visit Cabana showroom and warehouse and have lunch with the showroom manager
- 3:00pm Leave hotel by limousine to the airport
- 5:00pm Leave JFK Airport on American Airlines flight 311 Seat 10b. (ticket attached)

Source: adapted from Stroman, Wilson & Wauson (2014, p. 39)

Grammar Focus

1. Itinerary expressions

A business travel itinerary should be concise and specific. Only necessary details for the trip should be included. To make the itinerary clear for the management, it is better to use short sentences. It is best to begin the sentences with simple verbs such as meet, arrive at, talk to, leave, visit etc.

For example:

- Leave the hotel to the airport.
- Arrive at JFK Airport.
- Pick up by
- Lunch at
- Meet
- Visit

2. Writing tips

After a business travel itinerary is completed it is essential for a secretary to proofread the final draft of an itinerary. A secretary has to make sure that all relevant details are covered in the business itinerary. There should be no mistakes such as typing errors or spelling errors. This can prevent any problems that might occur during the overseas trip. Following are key issues that should be checked:

- All dates and times for business meetings are correct.
- Flight details and airport details are correct.
- All names and titles are spelled correctly.
- Accommodation details are provided.

Dealing with money currencies



Warm up questions

1. Have you ever exchanged money currencies?

.....
.....
.....

2. Do you know which money currencies are used in Asian countries?

.....
.....
.....

3. Do you know which money currencies are used in European Union countries?

.....

.....

.....

Introduction

When business people travel to other countries, they have to exchange their money for the local currency. If the management is going to European Union countries, they will need to exchange for Euros. However, if they are visiting Asian countries e.g. China, Japan, Malaysia or Vietnam, the money currencies used in these countries are completely different. It is essential for a secretary to check the money exchange rate and availability of the currencies used in the country of destination.

Samples of countries and their currencies are as follows:

Country	Money currency
Australia	Australian dollar
Austria	Euro
Belgium	Euro
Canada	Canadian dollar
China	Yuan Renminbi
Finland	Euro
France	Euro
Germany	Euro

Hong Kong	Hong Kong dollar
India	Rupee
Italy	Euro
Korea	Won
Malaysia	Ringgit
New Zealand	New Zealand dollar
Singapore	Singapore dollar
Sweden	Krona
Thailand	Baht
United Kingdom	Pound Sterling
USA	US dollar

Source: Stroman, Wilson & Wauson (2014)

Exercise 4

Instructions: Name the money currencies used in each country and their symbols and fill in the table below.

Country	Currency	Symbol
1. USA		
2. Canada		
3. England		
4. Italy		
5. India		

6. Japan		
7. Australia		
8. New Zealand		
9. France		
10. China		
11. Vietnam		
12. Thailand		
13. Sweden		
14. Germany		
15. Malaysia		

Exercise 5

Instructions: Write a complete sentence about money currencies.

For example: Australian people use the Australian dollar.

1. Yen

.....

2. Ringgit

.....

3. Yuan

.....

4. Euro

.....

5. Baht

.....

6. Won

.....

7. Pound Sterling

.....

8. Rupee

.....

9. Dong

.....

10. US dollar

.....

Grammar Focus

Polite expressions

When requesting information from someone about money currencies, it is appropriate to use polite expressions such as can, would, could, please.

For example:

- What is the buying rate for US dollar ***please?***
- I ***would like*** to exchange Hong Kong dollar to Thai baht ***please.***
- ***Can*** I check today's rate for AUD dollar ***please?***
- ***Can*** I buy New Zealand dollar here?

- I would like to exchange 200 euros into Japanese Yen please.
- Can I have the exchange rate for Singaporean dollar please?

Language practice

Exercise 6

Instructions: Read the following sentences and decide whether they belong to a secretary (S) or money exchange staff (M)

1. Will I get the same rate at the airport? (S/M)
2. Do you have Hong Kong dollars here? (S/M)
3. The exchange rate for the Euro to Japanese Yen is 1 euro to 124.51 Yen. (S/M)
4. Do you have 100 Australian dollar notes? (S/M)
5. What is the Pound Sterling rate for today? I have heard that the rate has gone down a bit. (S/M)
6. One dollar is 26.79 Baht. (S/M)
7. If I exchange ¥20,000 how much will I get in Thai baht? (S/M)
8. I would like to change 300 euros into Chinese yuan please. (S/M)
9. What is the buying rate for the Malaysian Ringgit please?
10. I need 200 pounds please. (S/M)

11. I would like to exchange some euros to Thai baht please. (S/M)

12. Can I have your passport please? (S/M)

Sample dialogue

Followings are dialogues between a secretary (S) and a money exchange staff (M)

Dialogue one

M: Hi. Can I help you?

S: Hi. I'd like to exchange some Japanese Yen for Thai Baht. What is the today rate please?

M: One Japanese Yen is 0.307504 Baht.

S: Can I change ¥25,000 please?

M: Sure.

Dialogue two

S: Hi. I'd like to exchange some US dollars for Thai Baht. What is the today rate please?

M: One dollar is 34.1068 Baht.

S: Can I change \$500 please?

M: Sure. Can I have your passport please?

S: Here you are.

M: That will be 17,048.78. Here is your receipt Ma'am.

S: Thanks. Oh one more question. How much will I get in euros for THB10,000?

M: You will get 262.521 euros.

S: That's good. Can I have 250 euros?

M: No problem. How would you like your bills?

S: In fifties please.

Source: the author's work

Language Practice

Exercise 7

Instructions: Match money currencies with the abbreviations.

EUR GBP USD THB CAD AUD RUB

INR HKD JPY MYR NZD SGD PHP

- | | |
|-----------------------|--------------------------|
| 1.....British Pound | 8. ....Singapore Dollar |
| 2.....Thai Baht | 9. ....Malaysian Ringgit |
| 3.....Philippine Peso | 10. ....Japanese Yen |
| 4.....Euro | 11. ....US Dollar |
| 5.....India Rupee | 12. ....Russian Ruble |

6.....Hong Kong Dollar 13.New Zealand Dollar

7.....Australian Dollar 14.Canadian Dollar

Exercise 8

Instructions: Check the exchange rate from the internet and answer the following questions.

1. What is the currency used in Malaysia?

.....

1.1. What is the exchange rate against Thai baht?

.....

2. What is the currency used in UK?

.....

2.1. What is the exchange rate against Thai baht?

.....

3. What is the currency used in France?

.....

3.1. What is the exchange rate against Thai baht?

.....

4. What is the currency used in China?

.....

4.1. What is the exchange rate against Thai baht?

.....

5. What is the currency used in Japan?

.....

5.1. What is the exchange rate against Thai baht?

.....

6. What is the currency used in New Zealand?

.....

6.1. What is the exchange rate against Thai baht?

.....

7. What is the currency used in Hong Kong?

.....

7.1. What is the exchange rate against Thai baht?

.....

8. What is the currency used in Singapore?

.....

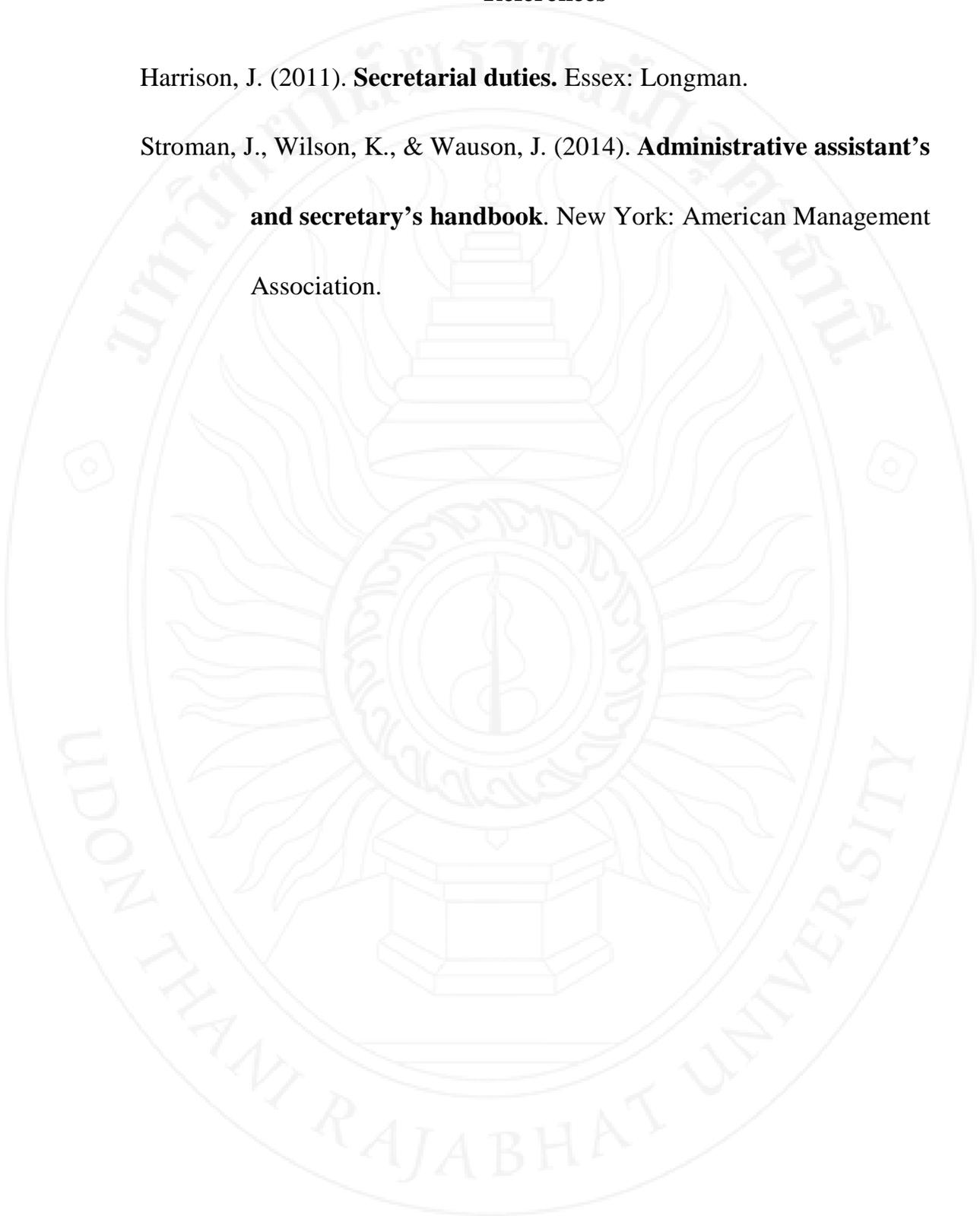
8.1. What is the exchange rate against Thai baht?

.....

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Course Syllabus Unit 4

Answering the telephone

6 hours

Course content

1. Answering the telephone
2. Taking messages
3. Telephone manners

Objectives

After completing this unit, students should be able to:

1. answer the telephone and deal with callers effectively.
2. use polite and proper telephone phrases
3. recognize and use telephone etiquette

Activities

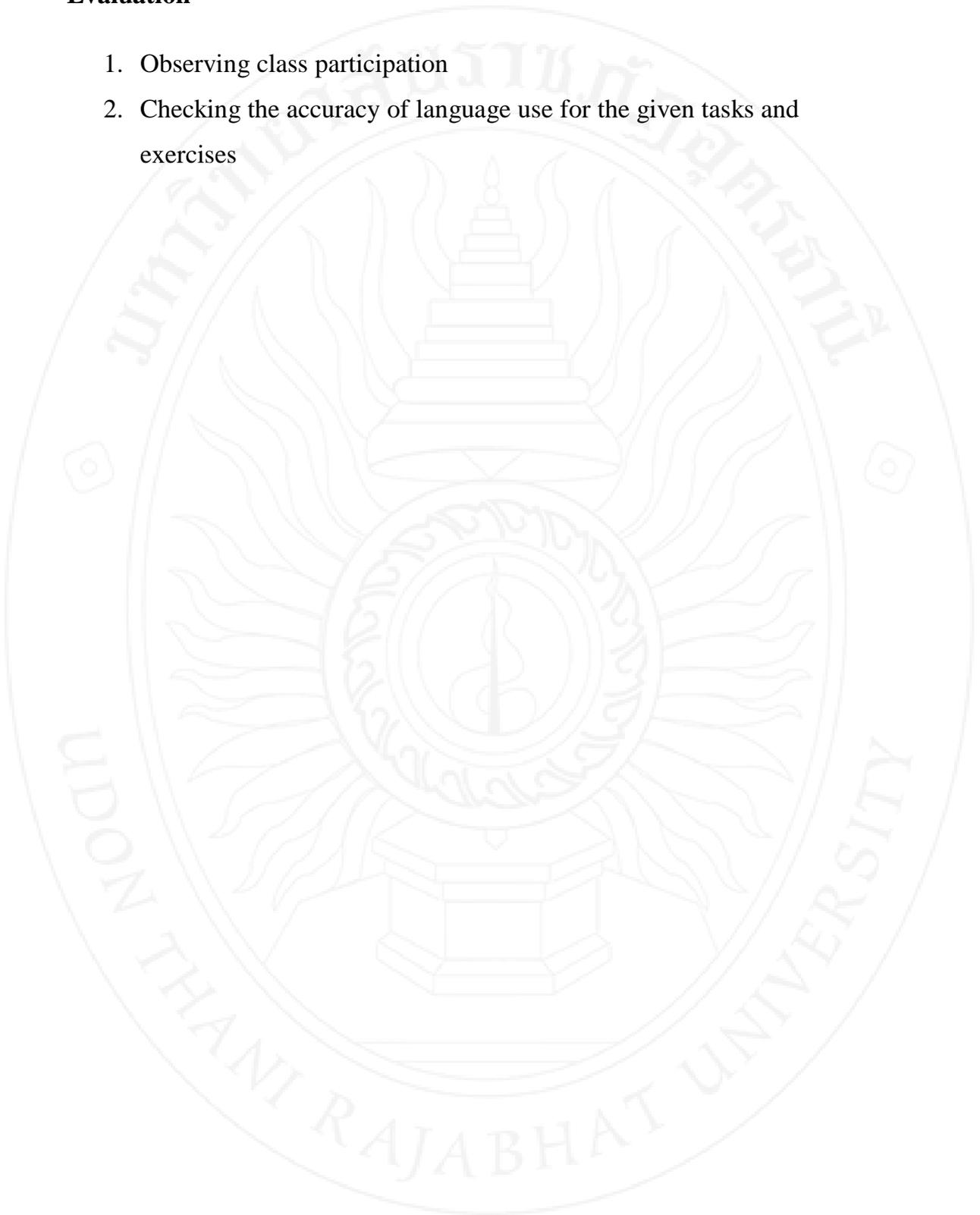
1. Lecture
2. Pair work
3. Group work
4. Group discussions

Teaching materials

1. Instructional materials
2. Sample telephone dialogues from the internet
3. Worksheets

Evaluation

1. Observing class participation
2. Checking the accuracy of language use for the given tasks and exercises



Unit 4

Answering the phone



Warm up questions

1. Do you think answering the telephone is an easy task? Why?

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.....

.....

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2. Can you think of any problems that a secretary might face when answering the telephone?

.....

.....

.....

.....

Key vocabulary

Verb + Noun Collocations
- answer the telephone
- answer the call
- pick up the telephone
- return the telephone call
- greet the caller
- identify the caller
- ask for repetition
- repeat the message
- confirm the message
- inform the caller
- apologize to the caller
- give information to the caller
- transfer the call

Introduction

Obviously, the telephone plays a key role in any business activities. It is a major tool used to connect to the outside world. Therefore, it is critical for a secretary to be polite as well as professional when answering the telephone. For a secretarial job, it might sound easy for someone to pick up the telephone and answer it. However, in real life situations this might not be the case.

Apparently, in business situations, people call for definite reasons. What they

really need is to talk to someone who can fulfill their needs promptly or who can respond to their inquiries efficiently. Nobody wants to waste their time when making a business call. If the secretary is not able to handle the call properly or keeps the caller waiting for a long time, the caller will definitely not be happy, and this may affect the business reputation. In case that a secretary is not sure about names, address or any other information, it is wise to politely ask the person to spell out the words (Millan & Toselli, 1997). Therefore, it is essential for a secretary to be competent, skillful and tactful when dealing with telephone calls.

Telephone expressions

Following are useful expressions for answering telephone calls in the workplace.

1. Identifying your company

- Good morning. Sunrise Technology. How can I help you?
- Mr. Peterson's Office. Sarah speaking. What can I do for you?
- Hello Personnel Department. Can I help you?
- The President's Office. Can I help you?

2. Identifying the caller

- Who's calling please?
- May I ask who's calling please?
- Can I have your name please?
- May I know your name please?

3. Asking for repetition

- I'm sorry, I could not hear what you said.
- Sorry I didn't catch what you said.
- Can I have your name again please?
- Would you repeat your company's name please?
- I'm sorry, I can't hear you.
- I'm afraid it's a bad line. Could you speak up a little please?
- Could you speak a little louder, please?
- Could you repeat that please?
- Would you mind repeating that?
- Could you speak a bit more slowly please?
- Sorry would you like to talk to Mr. Pete or Mr. Peter?

4. Putting the caller on hold

- One moment, please.
- Just a moment, please.
- One second, please.
- Hold on a second, please.
- Hold the line, please.
- Do you mind holding?
- Would you mind holding while I check?
- Just a moment please. I'll put you through.
- I'll check if he's in the office. One moment please.

5. Informing the caller concerning a wrong call

- I'm sorry Mr. Henry does not work here anymore.
- I'm sorry Mrs. Carroll has retired.
- Sorry, I think you might have dialled the wrong number.
- Miss Ramona is not at this number any longer. Her new number is 97634475.

6. Apologizing for the inconvenience

- I'm afraid Mr. John is not in today.
- I'm afraid Mr. John is not available at the moment.
- I'm afraid Mr. John is in a meeting right now.
- I'm afraid Mr. John is on leave/ on vacation/ on holiday. He won't be back until June 15th.
- I'm afraid Mr. John is out for lunch. He should be back in an hour.
- I'm afraid Mr. John is on business trip.
- I'm afraid Mr. John has just left.
- I'm afraid Mr. John is not well today.
- I'm afraid Mr. John is on another line. Would you like to wait?
- I'm afraid the line is busy.
- I'm afraid the line is engaged.

7. Offering help

- Would you like to speak to someone else?
- Would you like to speak to his assistant?
- Can anyone else help you?
- Would you like to hold?

- Would you like to talk to his assistant/ his secretary?

8. Taking messages

- Can I take a message for Mr. Hopkins?
- Would you like to leave a message?
- Would you like him to call you back?
- Shall I ask him to call you back?

9. Confirming messages

- You said you could not come to the meeting, is that correct?
- You will come to meet Mr. Kenji tomorrow at 10am, is that right?
- You will arrive at the airport at 7.15pm, is that right?
- I'll make sure she gets the message.
- I'll ask her to return your call.
- I'll tell him that you called.
- I'll get him to call you as soon as he gets back to the office.

10. Ending a call

- Is there anything else we can help you with?
- Thank you for calling Mrs. Sarah.
- Thank you for calling. Goodbye
- Thanks for calling. Have a nice day.

Grammar Focus

1. Polite expressions

When answering the telephone it is a must for a secretary to be polite and pleasant. The point is you cannot tell who is calling. The way you greet the callers or give information can really impress them or the opposite. Your tone of voice or your emotion while talking on the telephone will also influence the success or failure of business transactions. Polite expressions to be used when answering the telephone are as follows:

- Mr. Peterson's Office. Megan speaking. **What can I do for you?**
- IST Co., Ltd. **Can I help you?**
- Who's calling **please?**
- **Could you** speak a little louder please?
- **Can** I have your company name please?
- **Could you** hold the line please?
- I'll check if he's in the office. **One moment please.**
- **I'm sorry** Mr. David doesn't work here anymore.
- **I'm afraid** Mr. Steve is on another line. **Would you like** to wait?
- **Would you like** to speak to his secretary?
- **Would you like** to leave a message?

2. Object pronoun

When talking about the third person or the one whom the caller wishes to talk to on the telephone, you should use object pronoun such as him, her, them. The use of a pronoun will help you avoid repeating that person's name (Raimes, 2006, p.106).

Subject pronoun	Object pronoun
I	me
We	us
You	you
He	him
She	her
It	it
They	them

Followings are examples of object pronouns when talking on the telephone:

- I'll give **him** your message.
- I'll tell **her** that you called.
- I'll tell **him** to contact you as soon as he gets in.
- Would you like **him** to call you back?
- I'll tell **her** to reply to your email right away.
- I'll remind **him** that he has to meet the President at 1pm.
- I'll tell **him** that you will be late 15 minutes.
- I'll tell **her** that you will come to see her tomorrow.

Language practice

Exercise 1

Instructions: Rewrite the following sentences by using polite expressions.

1. He is not here.

.....

2. Call back later.

.....

3. I can't hear you.

.....

4. Your name?

.....

5. Your number?

.....

6. She's busy.

.....

7. Can you wait?

.....

8. What did you say?

.....

9. Speak louder.

.....

10. He is sick.

.....

11. Spell your name.

.....

12. Hold the line.

.....

Exercise 2

Instructions: Choose the correct answer.

1. a. I'll tell she that you called.
b. I'll tell her that you called.
2. a. I'm sorry she is busy at the moment.
b. I'm sorry her is busy at the moment.
3. a. I'll check if he's in the office.
b. I'll check if him's in the office.
4. a. Would you like to speak to she secretary?
b. Would you like to speak to her secretary?
5. a. Does he have your number?
b. Does he have you number?
6. a. I'm sorry I can't hear your.
b. I'm sorry I can't hear you.

- 7. a. Can I have your name please?
b. Can I have your name please?

- 8. a. Shall I take a message?
b. Shall me take a message?

- 9. a. Would you like to call back?
b. Would your like to call back?

- 10. a. Do you have him number?
b. Do you have his number?

Exercise 3

Instructions: Think about what you will say to the caller in the following business situations.

Situation 1: You are a company secretary. Somebody called your boss but you cannot hear the caller properly, what will you say to the caller?

.....
.....

Situation 2: You are a company secretary. Somebody called your boss but he is not in the office, what will you say to the caller?

.....
.....

Situation 3: You are a company secretary. Somebody called the wrong number, what will you say to the caller?

.....
.....

Situation 4: You are a company secretary. Somebody called your boss but you cannot hear the caller properly, what will you say?

.....
.....

Situation 5: You are a company secretary. Somebody called your boss but he is on another line, what will you say to the caller?

.....
.....

Exercise 4

Situation: You are a department secretary. A customer called but nobody is in the office at that time. Think of different responses to tell the caller. You can begin with I'm sorry or I'm afraid. Then take turns speaking with your peer.

1. A: Can I talk to the Sales Manager please?

B:

2. A: Can I talk to the Assistant Sales Manager please?

B:

3. A: Can I talk to one of the Sales representatives please?

B:

4. A: Can I talk to somebody in the Sales Department please?

B:

5. A: Can I talk to James Smith please?

B:

Telephone etiquette

To answer the telephone in a professional manner, there are some common practices to consider as follows:

- When you answer the call, turn away from your computer, desk, and other work. Don't allow distractions to take your attention away from the caller.
- Always have something available to write with.
- Answer calls by the second or third ring.
- Smile when you answer your calls. Even though the caller can't see it, he or she will hear the smile in your voice.
- Control your volume and speed. Speak clearly.
- Be enthusiastic and respectful.
- Avoid unnecessary jargon and acronyms in your conversations.
- Practice good listening skills.

- Thank the caller for calling. Ask the caller to call again.
- Never eat, drink, or chew gum while you are on a call.

Source: Stroman, Wilson & Wauson (2014)

Exercise 5

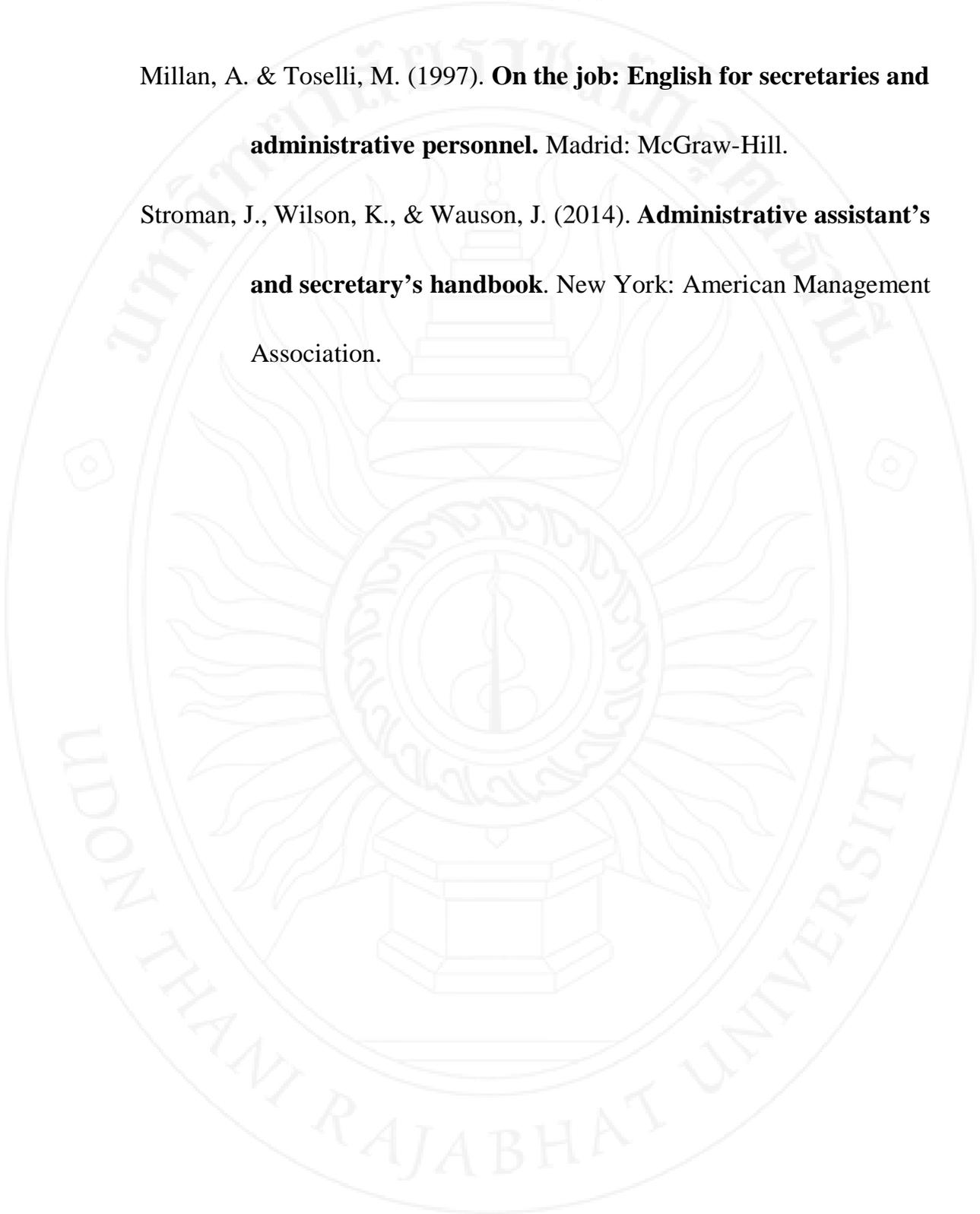
Instructions: Read the following sentences. Write (T) if the sentence is true and (F) if the sentence is not true.

-1. It is appropriate to talk about personal issues on a business call.
-2. There is no need to answer the telephone at lunch time.
-3. You should not keep the caller waiting for too long.
-4. It is appropriate to interrupt the caller.
-5. When you are on the telephone, you should pay attention to the caller.
-6. You should be polite when talking on the telephone.
-7. It is proper to have some coffee while talking on the telephone.
-8. If you have no idea about what the caller is asking, you should say so.
-9. It is appropriate to use slang and jargon on the telephone.
-10. You should identify yourself when answering the telephone.

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Millan, A. & Toselli, M. (1997). **On the job: English for secretaries and administrative personnel.** Madrid: McGraw-Hill.

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Course Syllabus Unit 5

Making telephone calls

6 hours

Course content

1. Making a good telephone call
2. Making a telephone call overseas
3. Telephone etiquette

Objectives

After completing this unit, students should be able to:

1. make an effective telephone call
2. deliver good telephone manners
3. recognize key vocabulary and expressions used on the telephone.

Activities

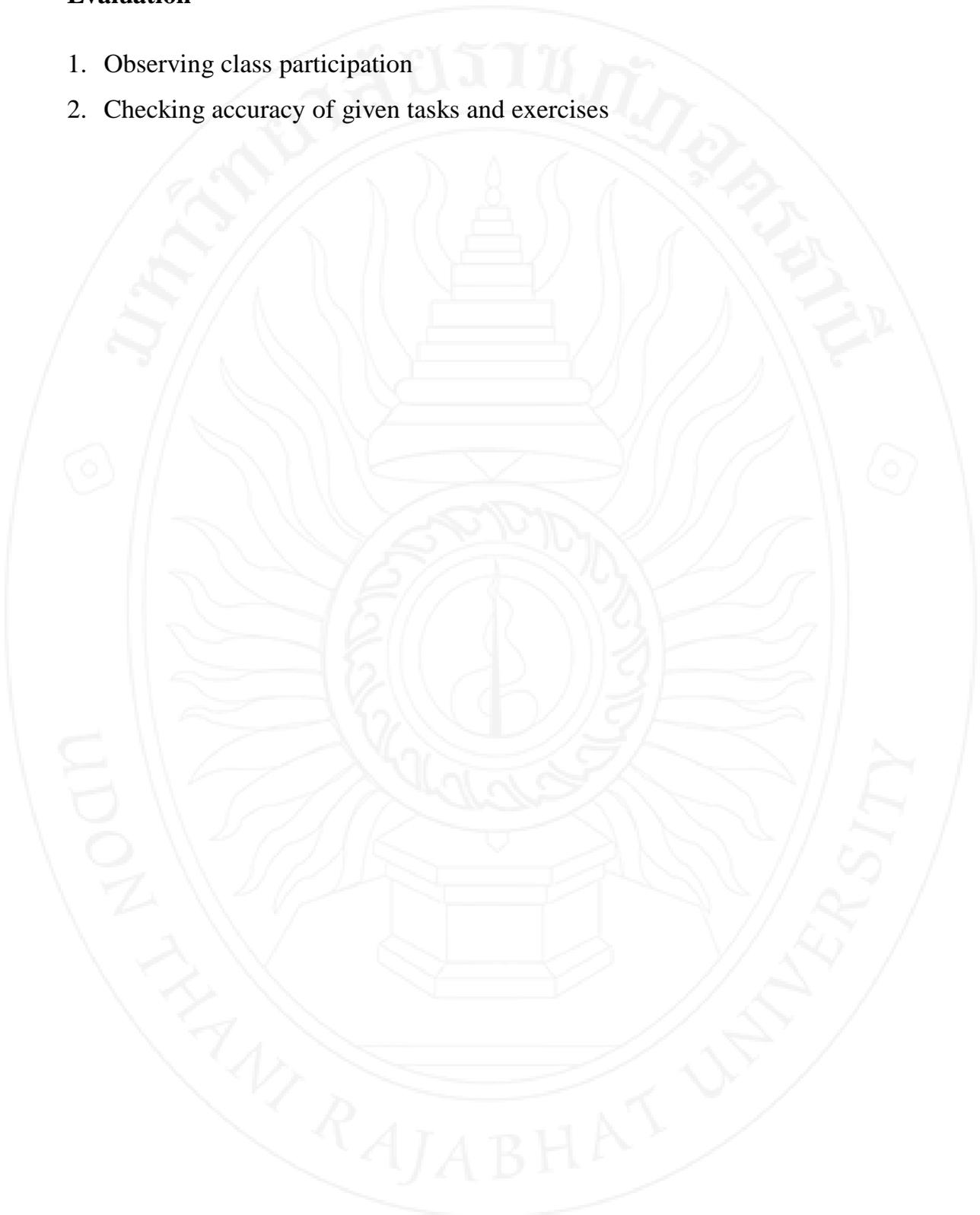
1. Lecture
2. Individual work
3. Pair work
4. Group discussion

Teaching materials

1. Instructional materials
2. Sample dialogues from the internet
3. Worksheets

Evaluation

1. Observing class participation
2. Checking accuracy of given tasks and exercises



Unit 5

Making telephone calls



Warm up questions

1. How often do you make a telephone call for business situations?

.....

.....

.....

2. Think of 5 things that you need to prepare before making a telephone call?

.....

.....

.....

.....

Key vocabulary

Verb + Noun Collocations

- call someone
- contact someone
- remind someone
- talk to someone
- speak to someone
- make a telephone call
- have an appointment with someone
- return someone's call
- leave a message
- confirm the meeting
- cancel the appointment
- arrange for the meeting

Introduction

Making an effective telephone call in the business environment is not necessarily an easy task. It requires good telephone skills and manners. For instance you should be polite, show interest in what is being said, reply in a clear tone, be a good listener and know what the person at the end of the line is

saying to you (Stroman, Wilson & Wauson, 2014). Your voice is an important asset when making a telephone call as it reflects emotions. People cannot see you but they can hear you. Thus, it is wise to use the right volume and the right speed when using the phone. Good preparation can make telephoning much easier and more effective (Sweeney, 2003).

To make a telephone call in the business context, it is necessary to be well prepared. According to Murthy & Nagasubramanian (2007), a telephone call should be planned exactly the same way as a business letter. The caller should prepare a list of points to be discussed. There are particular issues to be considered when calling someone at work.

For example:

- You should have the correct number.
- You should know the name of the person whom you wish to talk to or the name of the department.
- You should have the subject or specific topics that you want to ask.
- If you are calling on behalf of your boss, you should find out exactly what he or she wants from the call.
- You should identify yourself and your company.
- You should be ready to leave a message in case the person is not available.
- You should have the relevant documents with you in case you need to refer to something while calling.

Source: Murthy & Nagasubramanian (2007, p. 129)

Telephone expressions

When making a telephone call it is professional to start a conversation by greeting and identifying yourself. It is essential to say it as clearly as possible so that the person knows who you are and whom you want to talk to. When you finish talking, you can end your call by thanking the person you are talking to. Following are useful expressions for making telephone calls in the workplace.

1. Identify yourself

- Hello, this is Somluck calling from Infotel.
- My name is I'm calling from
- This is from
- Hi Bob, it's Linda here.

2. Asking for connection

- I'd like to speak to.....
- Can/Could/May I speak to ?
- Could you put me through to?
- Dr. Howard Wilson please.
- Miss Lily Extension 244, please.
- Mr. Winai room number 1509 please.
- Is Debra there please?
- Is Jackie in?

3. Reasons for calling

- I'm calling about order No. 05521. We have not received the goods yet.
- I'm calling about a hotel reservation for Mr. Chris.
- The reason I called is to make an appointment with your sales team. When would be a good time?
- I'm calling to check that you received my fax. I sent it this morning.
- I'm calling to confirm that Mr. Freeman will attend the seminar next week.
- I was wondering if you could tell me about the details of the forthcoming management meeting in London.
- Mr. George Springfield asked me to call you to confirm the trip to Japan next month.

4. Leaving a message

- Can you ask him to call me as soon as possible?
- Please tell her that I need the sales report by Monday.
- Please tell Jenny that the meeting will start at 10am tomorrow and please tell her to bring the monthly report with her.
- Please tell Miss Kim that Dr. Cris will meet her for lunch tomorrow at Boathouse Restaurant.
- Please tell Mr. Vejay that I'll pick him up at the airport on Friday at 4pm.
- Please let her know that Mr. Mark Taylor from SCB will visit the factory on Monday at 11am.

5. Speaking to someone else

- Can I speak to his assistant/ his colleague?
- Can I talk to one of the sales staff?
- Can I talk to someone who is in charge of language training please?
- I'm interested in the Small Business Workshop. Who can I talk to please?
- Can I talk to someone about the car insurance please?
- Can I talk to someone in the Finance Department please?

6. Ending the call

- Thank you very much for your help.
- Thank you so much for your time.
- I really appreciate your help in this matter.
- I look forward to seeing in Bangkok.
- Thank you for your help. Bye.
- I look forward to our meeting/ your call/ your visit/your email.
- Thank you. Goodbye.
- It was nice talking to you. Goodbye.
- Very nice to talk to you. Bye.

Grammar Focus

1. Polite expressions

When you call someone at work, it is always nice to use polite language.

For example:

- I was wondering if you could tell me about
- I would like to talk to
- Can I talk to
- May I speak to
- Can I leave a message?
- Could you tell her to
- Would you tell her
- Please tell her that
- Please let her know that

2. Future tense

When you want to make a promise about something or when you intend to do something, you should use the future tense. The structure of the future tense is as follows:

Subject + will + verb

- Please tell Mr. Thomas that **I will revise** the budget plan and **will contact** him again tomorrow.
- Could you tell her that **I will send** the company sales report by Monday morning?
- Could you tell her that **I will meet** her for lunch on Friday?
- Please tell Miss Susanna that **I will pick** Mr. Chen up at the airport tomorrow and **will take** him to the factory.
- Please tell Susan that **I will forward** flight details to her this afternoon.
- Please tell Dr. Vanida that **I will come** to her office at 2pm.
- Could you tell James that I **will email** him about the conference details in London tomorrow afternoon.

Language practice

Exercise 1

Instructions: Complete the following dialogues by identifying yourself and asking for connection. Then practice speaking with your partner.

1. A: Thai Airways International. Can I help you?

B:

2. A: Johnson & Johnson. May I help you?

B:

3. A: Siam Commercial Bank. May I help you?

B:

4. A: American Express. What can I do for you?

B:

5. A: Smith & Son Furniture. How can I help you?

B:

6. A: Le Meridian Kuala Lumpur. Can I help you?

B:

7. A: Cambridge University. What can I do for you?

B:

8. A: Commonwealth Bank. How can I help you?

B:

Exercise 2

Instructions: Complete the following dialogues by leaving messages. Then practice speaking with your partner.

1. A: I'm sorry Mr. Andy is not in. Would you like to leave a message?

B:

2. A: I'm sorry Miss Susan is not well today. Would you like to leave a message?

B:

3. A: I'm sorry Mr. Takeda is on business trip. Would you like to leave a message?

B:

4. A: I'm sorry Mr. Jackson is not available. Would you like to leave a message?

B:

5. A: I'm sorry Mrs. Prapaporn is on leave. Would you like to leave a message?

B:

6. A: I'm sorry Mr. Peter is out of town. Would you like to leave a message?

B:

7. A: I'm sorry Mr. Teera is in the meeting right now. Would you like to leave a message?

B:

Exercise 3

Instructions: Choose the correct preposition from the list below to complete the following sentences.

about to by in for on at of

1. Can I speak Mr. Wu please?
2. I need the confirmation letter tomorrow.
3. Let me transfer the line you.
4. Would you like leave a message?
5. Could you put me through Mr. Wallace please?
6. Please tell Margaret that I would like to meet her lunch.
7. I want check the price of the new scanner.
8. I look forward your email.
9. Thank you very much your help.
10. I would like to talk the person who is in charge
the computer training course please.
11. Can you tell Mr. Fisher call me back?
12. I want to talk the new advertising campaign.

Telephone etiquette

Good and courteous manners are considered important when making a telephone call in any business organizations. You have to show respect and pay attention to the person whom you are talking to and you have to make sure that you do not waste the caller's time. There are some basic telephone rules as follows:

Do's

- Plan the call thoroughly. Have clear objectives before calling.
- Send an e-mail before you call when necessary.
- Have all necessary information in hand.
- Be concise, polite and efficient. Time is money.
- Smile when you use the telephone. People can hear you smile.
- Use questions to identify key issues.
- Listen actively. Confirm regularly that you understand.
- Speak clearly and slowly.
- Speak with a positive manner.
- Allow people to finish what they are saying.
- Avoid complex language.
- Check that the other person understands.
- Take notes during the call.
- Send a follow-up e-mail to confirm.
- Finish with a positive phrase.

Don'ts

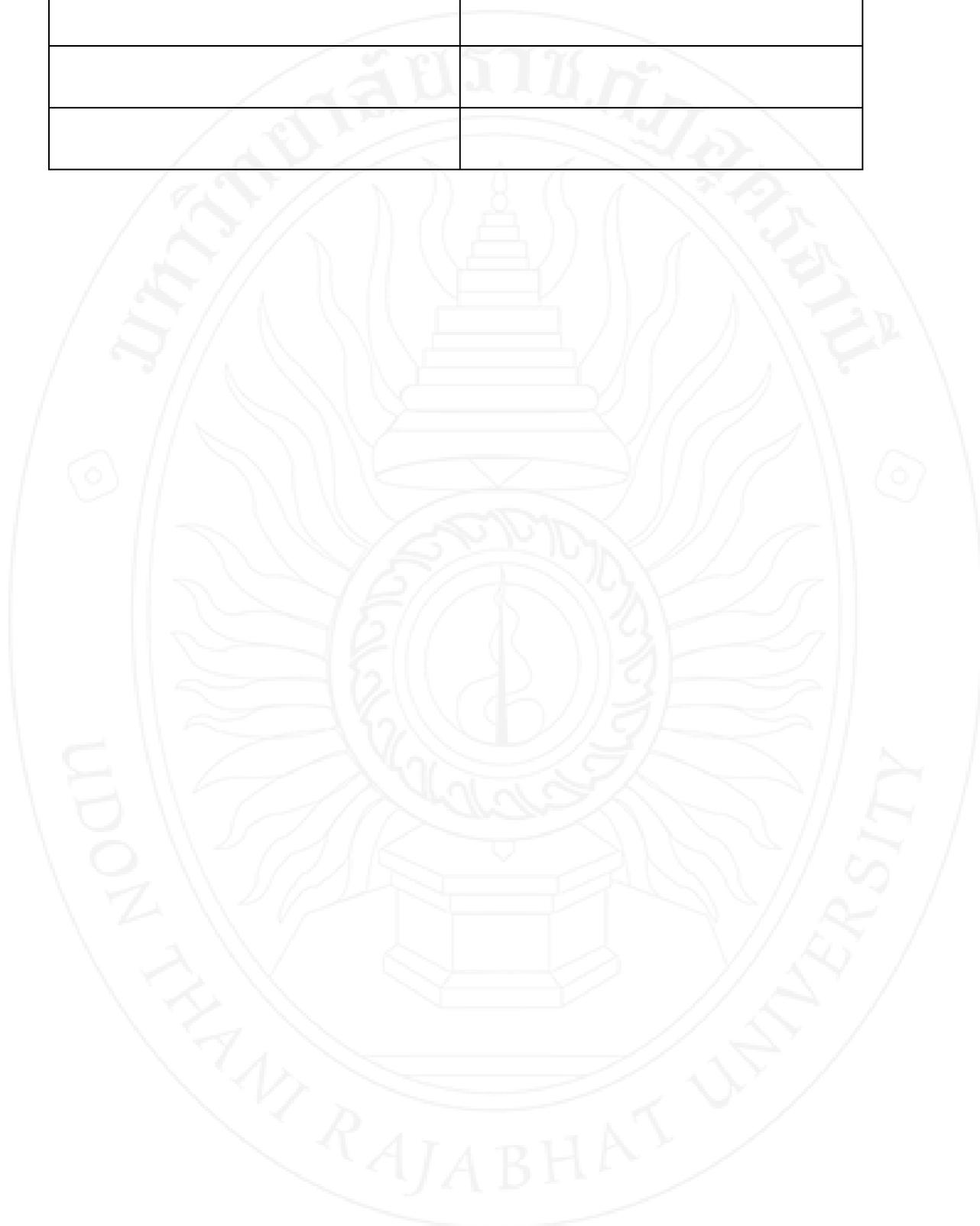
- Call if you are unprepared.
- Pretend to understand, especially when dealing with foreign accents.
- Assume that the person you are talking to has understood everything.
- Interrupt.
- Shout.
- Rely on your memory for important details.
- Forget to write down important details.
- Waste time.
- Put the receiver down too quickly. It can be rude.

Source: adapted from Dignen (2000, p. 34)

Exercise 3

Instructions: Work in groups. Think of things that you should do and things that you should not do when making a telephone call.

Do's	Don'ts



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Course Syllabus Unit 6

Dealing with appointments

6 hours

Course content

1. Making appointment via telephone
2. Making appointment via email
3. Cancelling appointment
4. Telephone etiquette

Objectives

After completing this unit, students should be able to:

1. Make an appointment by telephone and email
2. Cancel the appointment by using polite expressions
3. Be aware of telephone etiquette

Activities

1. Lecture
2. Individual work
3. Pair work
4. Group work
5. Group discussions

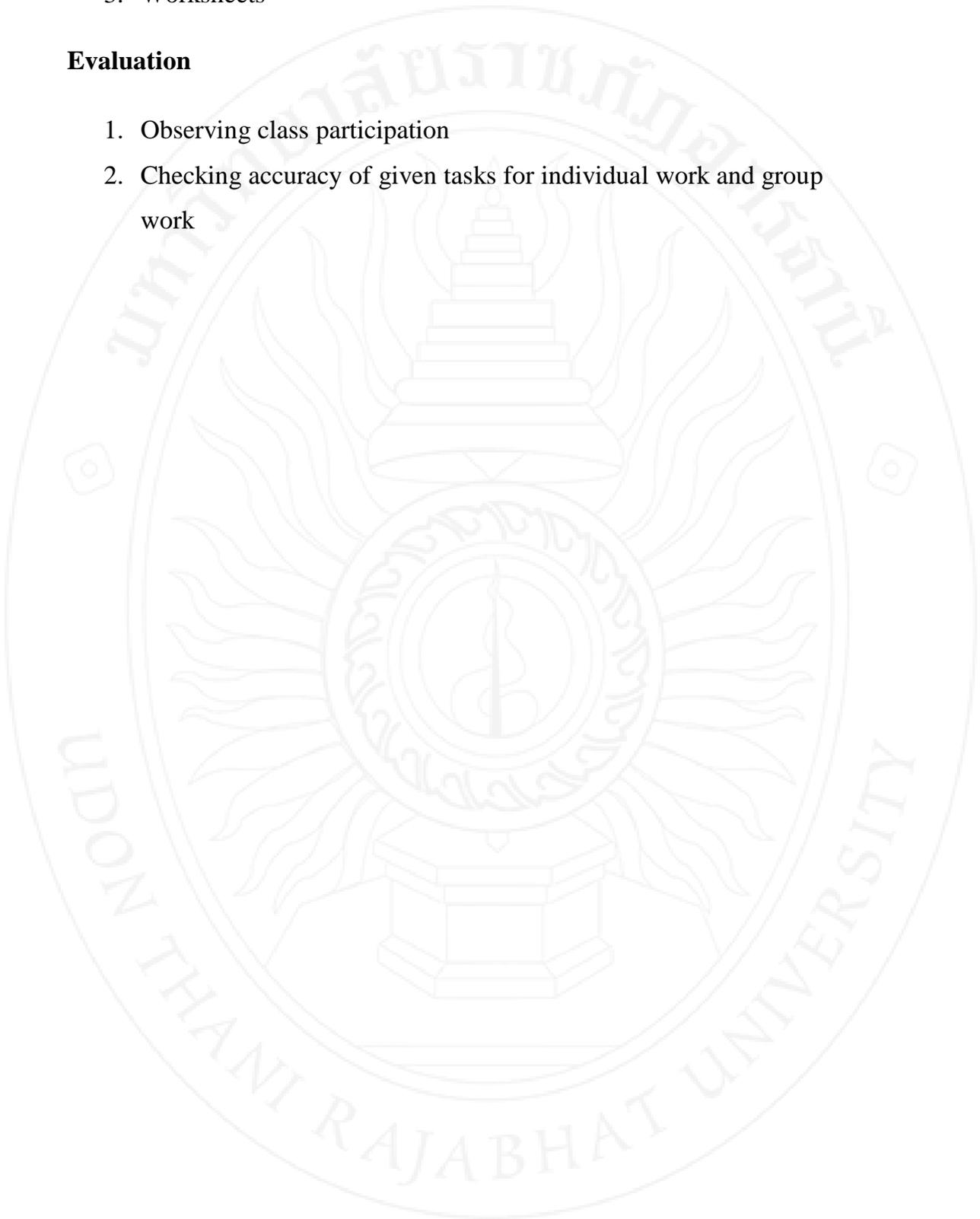
Teaching materials

1. Instructional materials
2. Sample telephone dialogues from the internet

3. Worksheets

Evaluation

1. Observing class participation
2. Checking accuracy of given tasks for individual work and group work



Unit 6

Dealing with appointments



Warm up questions

1. What will you say on the phone when you want to make an appointment with someone?

.....
.....
.....

2. Do you think it is necessary to make an appointment with someone in the workplace? Why?

.....
.....
.....
.....

Key vocabulary

Verb + Noun Collocations

- arrange an appointment
- make an appointment
- ask for an appointment
- confirm the appointment
- postpone the appointment
- cancel the appointment
- deal with appointments
- give callers some help
- give callers some choices
- make a reservation
- arrange an airport pickup
- prepare an itinerary

Introduction

In any business practice, if you want to discuss business matters with someone, it is common to make an appointment. The appointment can be done by telephone or by email. The reason is that business people seem to be busy with their work, especially top management. They have a lot of business events to perform e.g. attend the meeting, travel abroad, welcome visitors or meet

customers. Their schedule is booked in advance. If you walk in to see the manager without making an appointment beforehand, the chance to see him or her is rather low.

The main job of a secretary is to deal with appointments on behalf of his or her manager. He or she should be able to set an appointment, to confirm an appointment or to cancel the appointment. In cases where there are multiple business appointments, it is wise to set priorities in order to avoid over-scheduling. Therefore, it is extremely important for a secretary to be well-planned and well-organized. It is also crucial for a secretary to be pleasant and polite when dealing with customers on the telephone. They all have different needs or different expectations. This will definitely help a secretary to handle all sorts of business appointments successfully.

Visitors' appointment rules

One of the secretary's main routines is to answer telephone calls on behalf of his or her boss. In the business contexts people call for different reasons. Obviously, requesting an appointment with the management is one of them. It is important for a secretary to deal with all callers effectively and professionally in order to avoid miscommunication. When handling visitors' appointments on the telephone there are certain rules to take into consideration as follows:

- The appointment time should be convenient for the employer. Early mornings or late afternoons should be avoided.
- Before the appointment is fixed a secretary has to confirm with the management to make sure that he or she is available to meet the visitors on that day.

- A secretary should suggest optional times until callers are happy with them.
- If day and time of the appointment is agreed for both parties, it should be recorded in the diary in order to avoid difficulties such as double appointments or over appointments.
- All visitors details should be gathered e.g. name, title, company name, phone number and issues to be discussed.
- A written confirmation should be forwarded to the caller after the telephone discussion.

Source: Murthy & Nagasubramanian (2007)

Following is an example of a secretary diary. The Diary can be used to remind all parties of business activities such as:

- Appointments and meetings
- Social engagements
- Work deadlines
- Follow-up plans
- Holidays

Sample Secretary's diary

Monday June 16	
09:30	Management meeting in Meeting Room 3
11:00	Appointment: Mr. Hans Muller, Regional Director from Henkel Co., Ltd. Germany
12:00	Lunch at Rotary Club
14:00	Receiving visitors: Mr. Nguen and his team from Danang, Vietnam
16:00	Viewing video presentation from Sales department in the Meeting Room 2
19:00	Dinner with Mr. Mark Spencer, the marketing manager of Sun Tech California, at the Hilton Hotel

Source: adapted from Harrison, 2011, p. 240)

Handling appointments

In the business context, when dealing with telephone calls from clients or visitors, a secretary should always be polite, helpful and proactive (France, 2015, p. 70). It is always courteous to give callers some extra help or possible options for a business meeting. The secretary has to ensure that the caller agrees with the meeting date and time. In order to avoid misunderstandings, language use on the telephone has to be direct, concise and clear, especially when talking about days and times.

Useful expressions

Useful expressions for handling appointments on the telephone are as follows:

- Mr. Ken is busy all day on Monday. Would next Monday be ok with you?
- I'm sorry Mr. Smith is busy at that time. Would 2pm be possible for you?
- Mrs. Rivers will be available tomorrow morning. Does that work for you?
- Would Tuesday afternoon suit you?
- I'm afraid Dr. Brian might be out of town on Monday. How does Tuesday sound to you?
- Mr. Donald is out of the office all morning but he will be free in the afternoon.
- I'm sorry Mr. Precha has got a meeting in the morning. What time is good for you in the afternoon?

Useful expressions for confirming the appointments are as follows:

- Wednesday is fine for Mr. Tanaka.
- Tuesday suits him.
- Excellent. I'll see you tomorrow at 10am.
- Monday is perfect. Mr. Brown is available at 2pm.
- Friday sounds great. Shall we meet at four o'clock?

Arranging appointments

One of the important skills of a good secretary is to make an appointment on behalf of his or her manager. Arranging for an appointment with someone on the telephone is not difficult. However, a difficult part is how to make the speaker agree with the date and time that you prefer. Therefore, a secretary has to be efficient, well-organized and flexible. In the business environment, there are certain rules to follow when making an appointment on the telephone (Murthy & Nagasubramanian, 2007).

1. You should identify yourself and your company.
2. You should tell briefly why you wish to make an appointment with that person.
3. You should be specific when talking about day and time.
4. You should make sure that the person whom you are talking to agrees with the appointment.
5. You should confirm date and time of the appointment by email.
6. You should call the person or his assistant a day or two earlier to reconfirm the date and time of the appointment.

Polite expressions

In the business context, when asking for an appointment it is appropriate to use polite language. However, there are different kinds of politeness to use when dealing with different groups of people. It should be noted that the level of language use depends heavily on the context or the people whom you are talking to (Kramsch, 2016). You need to consider the role of that person when interacting with someone. The context will definitely tell you whether you should use formal or informal language. If you are talking to the management, of course the language use has to be formal. If you are having a conversation with staff or other non-managerial person, then the language use is neutral or less formal. Following are some formal and informal expressions that you can use when making a business appointment.

Formal situations

- I would like to arrange an appointment to see Mr. William Smith please.
- Could you indicate a suitable time and place to meet Mrs. Pamela Morgan please?
- Would it be possible to book an appointment to see Mr. Harry on Monday at 1pm?
- Is it possible to book an appointment to see
- I would like to book an appointment to see
- Could I/Can I/May I book an appointment to see
- Could I make an appointment with Prof. Nash please?

Neutral/informal situations

- Would Mr. Kenji be available on Thursday?
- Is Mr. Alan free on Monday?
- Would Friday suit you?

- Would Mrs. Tracy be free next week?
- When is the best time to meet Dr. John?
- Is he available next Tuesday?
- When would be convenient to meet the Production Manager?

Canceling appointments

When dealing with business transactions, unexpected things happen all the time and this may prevent you from keeping the appointment. If you have to cancel the appointment due to unforeseen circumstances, you have to offer an apology and arrange another appointment (Murthy & Nagasubramanian, 2007). However, the cancellation has to be done promptly and professionally in order to avoid the inconvenience to business partners. Some expressions for cancelling the appointment are as follows:

1. Polite expressions

Formal situations

- I regret to cancel our appointment on Friday due to unforeseen circumstances.
- I regret to say that I have to cancel our appointment because of an unexpected situation within our company.
- Unfortunately, I will be unable to meet you on Monday. Would it be possible to see you the next day at the same time and place?
- I'm afraid I have to cancel the management meeting on Friday. Mr. Smith has to attend the opening ceremony of our new factory on that day.

- I'm afraid Mr. Yoshi cannot meet you on 3rd May. He has to be out of town on that day. If it's convenient for you, I could reschedule the appointment on 4th May at 10am.

Neutral situations

- I'm afraid I cannot make it for the meeting tomorrow. I have unexpected problems at work.
- I'm sorry to say that I have to cancel our appointment on Monday afternoon due to unforeseen circumstances. Could you do it on Wednesday afternoon?
- I'm sorry I cannot keep our appointment on Thursday as something unexpected has come up. How about Friday instead?

Grammar Focus

1. Present Simple Tense

We use the present simple tense to talk about permanent situations, facts or opinions. The form of the present simple is

Subject + Verb (present form)

When using present simple it is essential to keep in mind that the verb form has to agree with the subject. If the subject is he/she/it, you have to add 's' or 'es' to the verb form.

For example:

- I **cannot make** it for the meeting tomorrow.
- I **have to cancel** our appointment on Monday.
- I'm sorry I **cannot keep** our appointment on Tuesday.
- Can I **book** an appointment to see Mr. Jonas?
- Mr. Smith **is** busy at that time.
- Mr. Pracha and Mr. Somporn **are** out of the office at the moment.
- Wednesday **sounds** great.
- Friday **suits** him.
- Mr. Roy and his assistant **have** a meeting in the morning.
- He **needs** to make an appointment.

2. Prepositions

We use the preposition 'at' to talk about a specific time of the day.

For example:

- I'll see you **at** 10 o'clock.
- Mr. Jack is free **at** 2pm.
- The meeting will start **at** 9am.
- Can I see Prof. Miller **at** 10am.tomorrow?

We use the preposition 'on' to talk about days of the week and dates.

For example:

- Mr. Mark will be free **on** Thursday.

- He has another appointment on Friday.
- I would like to arrange an appointment on May 15th.
- Is it convenient to meet the President on June 2nd?

We use the preposition 'in' to talk about months and years and we can use 'in' to talk about a particular time of the day, such as in the morning or in the afternoon. For example:

- Dr. Siri's schedule is full in January.
- Mr. Toshiro from Honda came to visit us twice in 2016.
- Is it possible to meet the Vice President in the morning?
- The visitors from Malaysia will arrive in the afternoon.

Language Practice

Exercise 2

Instructions: Choose the correct verb form.

1. Can I see/sees Mr. Jimmy please?
2. I would like to make/makes an appointment with Dr. Francis?
3. Miss Somjai has/have a meeting in the afternoon.
4. Monday is/are perfect for me.
5. Friday sound/sounds great.
6. Mr. Tom is/are not free in the morning.
7. Dr. Susan is/are in the meeting right now.

8. I cannot keep/keeps our appointment on Monday.
9. Is/are Friday convenient for you?
10. I is/am sorry to cancel/cancels our appointment.
11. I regret/regrets to say that I has/have to postpone our meeting.
12. The sales manager and his team is/are available at 1pm tomorrow.
13. I'm sorry Mr. Peter is/are busy this afternoon.

Exercise 3

Instructions: Choose the correct preposition.

1. Can I have an appointment with the Finance manager in/on/at Monday please?
2. I'm sorry Mr. Ramos is not free in/on/at the morning.
3. Is it convenient to meet the President in/on/at April 25th?
4. Mr. Li will visit our factory in/on/at June.
5. Can I meet Miss Sarah in/on/at 11 o'clock?
6. Mr. Smith will be free in/on/at Wednesday in/on/at 2pm.
7. I'm sorry the Vice President is not available in/on/at the afternoon.
8. Can I meet the sales staff in/on/at 10 am. tomorrow?
9. Will you be free in/on/at Friday?
10. Can I have an appointment with Mr. Mark in/on/at Tuesday afternoon?

Exercise 4

Instructions: Work in pairs. Rewrite the following sentences by using polite expressions.

1. I want to cancel the appointment.

.....

2. Mr. Tony cannot see you this afternoon.

.....

3. I want to meet the Head accountant tomorrow.

.....

4. When can I see the President?

.....

5. Asst. Prof. Sudaporn is not free today.

.....

6. Come to see Mr. Scot at 4pm.

.....

7. I want to make an appointment with Mr. Joe.

.....

8. I want to meet the Marketing Manager at 9am.

.....

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Course Syllabus Unit 7

Handling memos

6 hours

Course content

1. Memo format
2. Memo expressions
3. Memo samples

Objectives

After completing this unit, students should be able to:

1. Recognize the business memo format.
2. Use polite phrases and expressions for memo writing.
3. write effective memos

Activities

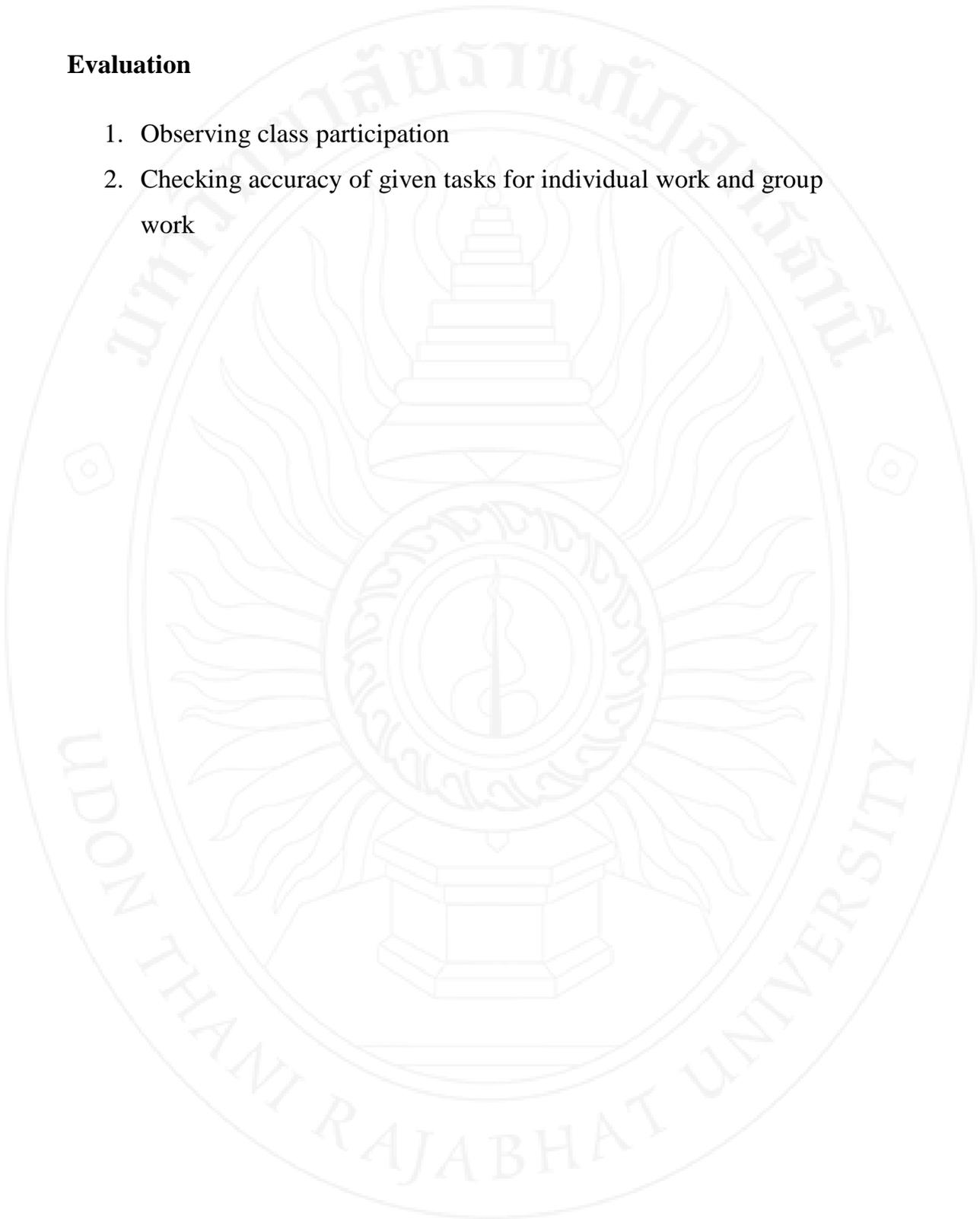
1. Lecture
2. Individual work
3. Pair work
4. Group discussion

Teaching materials

1. Instructional materials
2. Samples from authentic materials
3. Worksheets

Evaluation

1. Observing class participation
2. Checking accuracy of given tasks for individual work and group work



Unit 7

Handling memos



Warm up questions

1. What is the main purpose of writing office memos?

.....

.....

.....

2. In your opinion, is it necessary for a secretary to write an effective memo? Why?

.....

.....

.....

.....

Key vocabulary

Verb + Noun Collocations
- prepare a memo
- write a memo
- organise a memo
- send a memo
- remind someone
- give information to someone
- change information
- arrange a meeting
- postpone a meeting
- confirm a meeting
- announce the new policy
- cancel the appointment

Introduction

A memorandum or memo for short, is a written form of communication distributed to people within an organization. It can be inter-departmental memo, inter-office memo or inter-company memo (Millan & Toselli, 1996). In multinational firms, it is very common for people to correspond with one another by using memos. Memos can be sent by fax or emails. In the

workplace, memos can be put on a notice board for everyone to see or circulated via internal mail. In the latter case receivers may be asked to sign the memo to acknowledge that they have read it (Ashley, 2013, p, 251).

The memo has a unique format. The company name, address or company department usually appears at top of the memo. A memo should state who it is for, who it is from, the subject, and the date. It may be signed. People send memos for various reasons such as making enquiries, providing information, reminding, requesting or confirming something. According to Ashley (2013), memos can address many different subjects, from informing staff of a retirement to announcing administrative or structural changes within the company. Memos can be short or long, but they should be relevant to the topic. Too many points in one memo can confuse readers. In case that a secretary has many topics to inform the staff, it would more efficient to write a separate memo for each topic.

Memo format

There are two main parts of a memo: the heading and the body.

Generally, the heading of a business memo includes four parts, which are:

TO: (receiver's name and job title)

FROM: (writer's name and job title)

DATE: (complete date)

SUBJECT: (what the memo is about)

Source: Geffner (2013, p. 123)

Heading of the memo

Samples of the memo heading are as follows:

Sample one

Charles & Smith Co., Ltd.

TO: Robert Smith, Regional Sales Director

FROM: Nick Clare, sales representative

DATE: 10 March 2018

SUBJECT: Sales plan 2018

Sample two

QC Production Co., Ltd.

TO: All staff

FROM: Mr. Henry Ford, General Manager

DATE: 19 July 2018

SUBJECT: Mr. Yoshida's visit

Sample three

Bunbury Chemicals Co., Ltd.

TO: All staff

FROM: The President

DATE: 20 May 2018

SUBJECT: Mr. Lance's retirement

Sample four

General Motor Co., Ltd.

TO: All Department Heads

FROM: The President

DATE: 1 June 2017

SUBJECT: Management meeting

Memo language

Memos can be used to communicate for different purposes and they can be sent to people in various departments or various organizations. Before distributing business memos, senders should make sure that language use in the memo is businesslike, polite, and clear. It is very important for a secretary to edit the business memo before sending it.

The content of a memo can be written as follows:

1. To inform something

- I would like to inform you that Mr. Francis Mores from Canada will visit our company on Friday at 10am.
- Please note that we will have a staff meeting on Tuesday afternoon at the meeting room 3.
- I would like to inform you that the office number has been changed to 02 6778901.
- Kindly note that on Monday January 1st 2018, an inspector from Tokyo will come to inspect our factory from 9am – 11am.

2. To confirm something

- This is to confirm that Mr. Suree Kraiwutta will attend the telecommunication conference in Denmark.
- We would like to confirm the booking of Grand Ballroom for 240 TKK staff members in July.
- I would like to confirm that the opening ceremony of our new factory in Rayong will take place on 10th December 2018.

- This is to confirm that the sample products were sent by courier on May 22nd 2018.

3. To request something

- Could you send us your price list of the office furniture please?
- Could you fax us your new address please?
- Could you give us Mr. Pete's flight details please?
- We would be grateful if you could send us the serial number of the damaged products.
- Could you forward us the location of your factory in Indonesia please?
- Could you tell us the date and time of your visit please? Would you like us to book accommodation for you?
- Can we have a copy of your monthly report as soon as possible?

4. To attach something

- Please find attached our order No. NJ 2144.
- We have attached the confirmation letter for you.
- Please find attached the quotation for office furniture as requested.
- Attached please find our winter catalogue as requested. If you require more information, please do not hesitate to contact us.
- Please find attached the name list of our management.
- Attached are the results of the marketing survey in 2017.

Sample memos

Memo one

Bunbury Spareparts Co., Ltd.

TO: All staff

FROM: The President

DATE: 20 May 2018

SUBJECT: new CEO

With effective from 1 June 2018 Mr. Andrew Simkin has been appointed CEO. We wish him every success. All department managers please attend the meeting in the Meeting room 3 on 1 June at 9.30 a.m. where they will be introduced to Mr. Simkin.

Regards,

Sam Richie

Memo two

Smith & Son Co., Ltd.

TO: Robert Lloyd, Regional Sales Director

FROM: Nick Clare, sales representative

DATE: 22 January 2018

SUBJECT: Sales plan and budget plan 2018

I have attached sales plan and budget plan 2018 for Southeast Asia region as requested.

Best regards,

Nick Clare

Memo three

Topshop Co., Ltd.

TO: All staff

FROM: Mr. Henry Chapman, General Manager

DATE: 19 June 2018

SUBJECT: Mr. Yamada's visit

This is to inform you that on Monday June 30, 2018, an inspector from Honda Tokyo, Mr. Yamada Tamura will come to inspect our factory from 9am – 11am. Please welcome him on that day and answer any questions that he might have.

Regards,
Henry Chapman

Grammar Focus

1. Modal verbs

When writing business memos, we use *can*, *could* when we want to ask people to do things or take action. To make a polite request, you should use *please* at the end of the question or the sentence. The sentence structure for a question is:

Can / Could + subject + verb

- **Could you send us** your price list please?
- **Could you fax us** your new address please?
- **Could you give us** Mr. Pete's flight details please?
- **Could you send us** the serial number of the damaged product please?
- **Could you email us** the map of your factory in Indonesia please?
- **Could you tell us** date and time of your visit please? Would you like us to book accommodation for you?
- **Can we have** a copy of your monthly report as soon as possible?

2. Future tense

We use 'will' to talk about situations or actions that will be true in the future. The sentence structure of the future tense is:

Subject + will + verb

For example:

- Mr. Sato ***will visit*** our company on
- We ***will have*** a staff meeting on
- An inspector ***will come*** to inspect our factory on
- The opening ceremony ***will take place*** on
- Miss Tara ***will attend*** the conference next month.
- We ***will submit*** the proposals next week.
- The sales meeting ***will be held*** on

Language Practice

Exercise 1

Instructions: Choose the correct verb form.

1. Please *note/noted* that Mr. Charles is on leave. He will not be available until May 1st.
2. Could you *give/gave* your product number please?
3. We *have send/have sent* a quotation of 20 laser printers for you.

4. Could you *inform/informed* us the date and time of the visit of Mr. William please?
5. I would like to *visit/visited* your university next month.
6. Please be *inform/informed* that the staff meeting will be held in Meeting Room 3.
7. Could you *tell/told* all department managers to submit monthly report please?
8. Could you *book/booked* accommodation for Mr. Steve please?
9. This is to *inform/informed* you that the company will arrange language training for staff.
10. Please *send/sent* us brochures of your hotel in Vietnam.

Exercise 2

Instructions: Change the verb form in italics into future tense by using ‘will’.

1. Mr. Jeff *visit* our company on Friday.
.....
2. We *attend* a small business workshop in Bangkok.
.....
3. The meeting *is held* in KhonKaen.
.....
4. The finance manager *has* a business trip to Japan next month.
.....

5. Mr. Simon submits the report at the end of next week.

.....

6. The president talks about current financial situations at the board meeting.

.....

7. Mr. Li meets our sales team tomorrow to discuss business plans in China.

.....

8. We launch the new product next week.

.....

9. The academic fair is in August this year.

.....

Exercise 3

Instructions: Practice writing the subject of a memo. Rewrite the following sentences into noun phrases.

1. Mr. Robert from Adidas Germany will visit our company next Thursday.

.....

2. Please note that the staff meeting will be held on June 15th.

.....

3. This is to confirm that four of our managers will attend the Technology conference in London.

.....

4. Kindly note that your order No. NJ98320 has been dispatched.

.....

5. Please note that the cross cultural training will be held in Amari hotel from 10-12 May.

.....

6. With effective from 1 April, all staff are not allowed to park in the factory area.

.....

Exercise 4

Instructions: Work in pairs and complete the following memo headings.

Heading 1

Siam Trading Co., Ltd.

TO:

FROM:

DATE:

SUBJECT:

Heading 2

Volvo Co., Ltd.

TO:

FROM:

DATE:

SUBJECT:

Heading 3

Acer Co., Ltd.

TO:

FROM:

DATE:

SUBJECT:

Heading 4

Sirin Import Export Co., Ltd.

TO:

FROM:

DATE:

SUBJECT:

Exercise 5

Instructions: Work in pairs. Write a complete memo. Subject of the memo is already given.

Memo 1

Tesco Thailand Co., Ltd.

TO:

FROM:

DATE:

SUBJECT: company new address

.....

.....

.....

.....

.....
.....
Memo 2

Nano Textile Co., Ltd.

TO:

FROM:

DATE:

SUBJECT: Management meeting

.....
.....
.....
.....
.....
.....
.....

Memo 3

IBM Co., Ltd.

TO:

FROM:

DATE:

SUBJECT: Mr. Roger's visit

.....

.....

.....

.....

.....

.....

Memo 4

Panasonic Co., Ltd.

TO:

FROM:

DATE:

SUBJECT: New CEO



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Course Syllabus Unit 8

Handling emails

6 hours

Course content

1. Email format
2. Email language
3. Email etiquette

Objectives

After completing this unit, students should be able to:

1. write an effective email
2. recognise email etiquette
3. use appropriate terms and phrases when writing emails

Activities

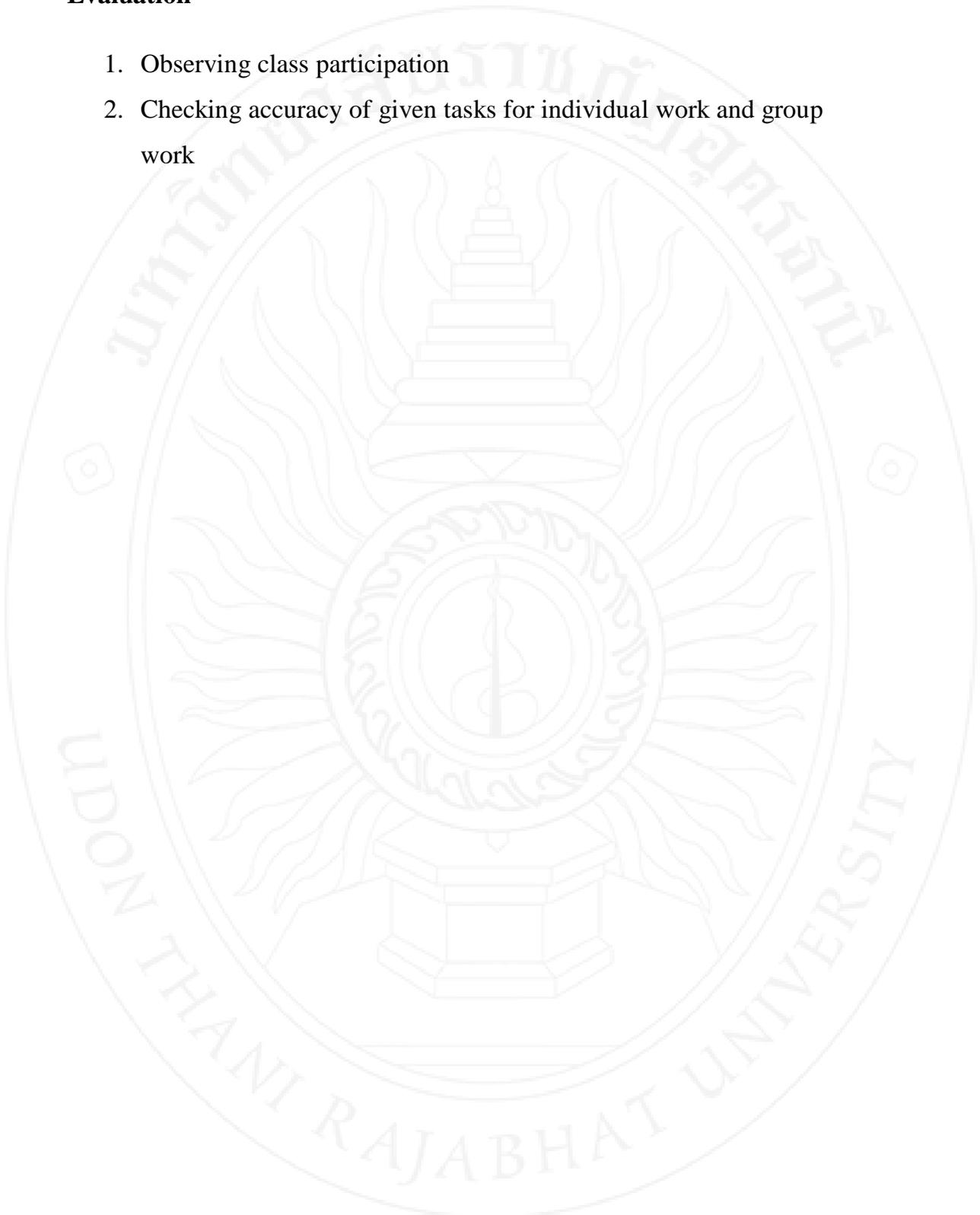
1. Lecture
2. Individual work
3. Pair work
4. Group discussion

Teaching materials

1. Instructional materials
2. Sample emails from internet
3. Worksheets

Evaluation

1. Observing class participation
2. Checking accuracy of given tasks for individual work and group work



Unit 8

Handling emails



Warm up questions

1. What are the advantages of using emails at work?

.....

.....

.....

.....

2. Is it necessary for a secretary to check emails carefully before sending?
Why?

.....

.....

.....

.....

Key vocabulary

Verb + Noun Collocations

- send emails to someone
- handle business emails
- email someone
- receive an email
- reply an email
- inform someone
- make an appointment with someone
- apologise to someone
- confirm something
- arrange something
- attach something
- forward something
- cancel something
- delete something

Introduction

Email or electronic mail is commonly used in business organizations. It is a means of sending messages between computers. To send and receive email, you definitely need access to the internet. The reason that people use email is that it is faster than the postal service and less expensive than telephone calls. It is also more casual than business letters (Geffner, 2013). Moreover, email can build first impressions when exchanging business transactions (France, 2015). A good business email should be sent to the right person at the right time, in the right way – with the correct information and any necessary attachments.

There are a lot of advantages for using emails in the workplace. For example:

- It is easy to use.
- You can send some attachments with emails e.g. letters, price lists, brochures or reports.
- It can be used both within and between companies.
- It is an effective way to communicate with people all over the world.
- It is useful for short messages and every type of business correspondence e.g. arranging a meeting, sending a request, or passing on information
- You can receive your e-mail while you are travelling via laptop or mobile phone.

However, there are some disadvantages of using emails.

- Sometimes you might face technical problems, such as inability to log into your email address.
- You might not receive the attachment or the attachment is unreadable.
- You might receive a lot of unsolicited mails (junk mails) in your mail box.
- If the internet is slow, it is hard to communicate with people.
- It lacks privacy and security.
- You cannot send confidential information via emails.

Source: adapted from Ashley (2013)

Business email rules

The written style of a business email is similar to letters but it is less formal. You can greet the receiver by beginning your email with Dear Tom, Dear Mr. George or Dear Sir/Madam. You can use complimentary closes such as Yours sincerely, Best wishes, Best regards, Regards. However, it should be noted that the way you begin or end your emails depends on how well you know the recipients or their titles. There are some rules to be aware of when writing or exchanging business emails.

Do's

- Always use correct grammar, spelling, capitalization and punctuation. It is important to check numbers, prices or dates in your email.

- Use appropriate language when writing business emails. It should look professional and convey business-like messages. The tone of your email should be positive.
- Keep your email message short and to the point. Nobody wants to read wordy and complicated emails.
- Try to limit yourself to one topic per message. This will keep your message brief and make it easier for the recipient to answer or file.
- Always proofread your email message. It should be informative and easy to read.
- Check the recipient's email address carefully in order to avoid sending emails to the wrong person.
- Check your email regularly.

Don'ts

- Do not confuse personal messages with business messages. For a business email, you should follow the same rules as writing business letters. You should write clearly, carefully, and courteously.
- Do not use slangs or jargons in your email.
- Do not keep the recipient waiting for your response for too long.
- Do not send confidential documents by email.
- Do not use texting abbreviations such as BTW (by the way), or cu (see you).
- Do not use emoticons to express your feelings such as :- (, :-), :-|
- Do not use negative message or criticize someone in business emails.

Source : adapted from Ashley (2013)

A list of abbreviations that you should avoid when writing business emails are as follows:

AFAIK	as far as I know
B4N	bye for now
BTW	by the way
CU	see you
CUL	see you later
FYI	for your information
IOW	in other words
OTOH	on the other hand
TIA	thanks in advance
TKS	thanks

Source: Pile (2010, p.38)

Business email format

According to Geffner (2013), the email format consists of the following parts:

1. Send to

In this part you enter the email address of the recipient

e.g. keithsimkin@yahoo.com, wanpen@gmail.com

or patraporn@udru.ac.th

2. Copy to

In this part you enter the email address of other people that you would like to receive your email. For instance if you wish to arrange a board meeting, you might like to invite key persons to the meeting, such as the vice president or all department managers. However, it is essential to check their email address carefully before sending.

3. Subject

In this part you enter the topic of your email such as appointment, hotel booking, flight details, short term plan or company project. It should be noted that the subject should be brief, simple and informative. The reader should be able to tell straight away what the email is about from the subject line.

4. Message

In this part you provide information for the recipient and that information should be relevant to the subject. It is professional to begin by greeting the recipient and close your email by using proper complimentary close. When dealing with clients, it is appropriate to use polite language.

5. Attachments

In this part you may attach files or documents for the recipient such as resume, business itinerary, minutes of the meeting, sales report or letter of order. When sending business emails, you should consider the recipients. For instance you should not attach too many files with one email or the file should not be too large, otherwise the recipient might not be able to download or read it. This can waste their valuable time. You should also make sure that the attached file does not contain virus or any confidential material.

Business email language

When writing business emails, language use should be polite, appropriate and concise.

1. Common Greetings

Informal		Formal	
Hi Nadia, Hello Steve, Hi Kim,	Regards, Cheers, Many thanks,	Hello Mr. Josh, Dear Mr. Alex, Dear Miss Jira, Dear Dr. Riach, Dear Assoc. Prof. Patra,	Kind regards, Best regards, Best wishes, Yours sincerely, Yours faithfully,

2. Common polite endings

Informal	Formal
- See you. - I'll talk to you later. - Have a nice day.	- I look forward to hearing from you. - I look forward to seeing you. - I hope to hear from you soon.

<p>- Take care.</p>	<p>- I look forward to meeting you.</p> <p>- I look forward to a positive reply from you soon.</p> <p>- Please feel free to contact me if you need more information.</p> <p>- Please do not hesitate to call if you need further details.</p>
---------------------	---

3. Common polite expressions

Neutral

- Thanks for inviting me for lunch next Thursday. I'll be there.
- Thanks for your help for the project. I'll see you later.
- Can you send me the proposal? It's urgent.
- Can you send me the list of the new management team please?
- Can you call Mr. Frank this afternoon?
- Please note that we have received your order. We will process it right away.
- Please find attached our budget plan for 2017.
- Attached please find an agenda for the board meeting on 2nd January.
- I have attached a business itinerary for Mr. Wilkins.

Formal

- Thank you for your email about the meeting on Friday. I regret to inform you that I will be unable to attend as I have to take care of visitors from Denmark on that day.

- We are pleased to confirm that your proposal has now been approved.
- This is to confirm that the conference room has been booked from 12-14 August 1018. The booking conditions are as follows:
- We are pleased to inform you that the President will be available for an interview with Mr. Parker on 5th July at 10am. The location is Meeting Room 3, Naraya Building 9th Floor.
- We would like to apologise for the delay of the shipment No. MSN09-188571. This is due to unforeseen circumstances.

Email samples

Email 1

Dear Tom,

Thank you for your email. Please see the quotation for the printer below.

Regards,

Ian

Email 2

Dear Anne,

Could you give me a call at 1109. I just want to discuss the project in Vietnam.

Regards,

Susan

Email 3

Dear Dr. Taworn,

Thank you for your email about the visit to our factory on 11 June.

Unfortunately, Mr. Smith is out of town on that day. He will be back on 13 June. If there is anything that I can help, please let me know.

Regards,

Ladda

Language Practice

Exercise 1

Instructions: Work in pairs. Read the following email messages carefully and decide whether they are neutral or formal.

1. We are pleased to inform you that your order No. HK09987 has been shipped on the Queen Victoria and it should reach you within 15 days.
(neutral/formal)
2. Just to let you know that I'll be away for a few days. I'll get in touch.
(neutral/formal)
3. Thanks for your order for the leather sofa. I'll give you shipment details by next week. (neutral/formal)
4. I got your fax. Thanks. (neutral/formal)
5. We have attached our purchase order No. QE1047. (neutral/formal)

6. Can we meet at 11am.tomorrow? (neutral/formal)
7. 11am sounds great. See you then. (neutral/formal)
8. I would like to inform you that Mr. Ashley cannot take part in the opening ceremony on May 15thdue to his illness. (neutral/formal)
9. Can you please send us the name list of participants from your university? (neutral/formal)
10. Kindly note that the sea view rooms are fully booked in January. Would you consider garden rooms?(neutral/formal)
11. I'm back in the office. Pretty tired. I'll talk to you later. (neutral/formal)
12. Mr. Simon from Unicorn would like to have an appointment with the President on Monday July 22nd. He would like to discuss cooperation between the two companies. What time would be convenient for him please? (neutral/formal)
13. Please find attached the powerpoint presentation for our new products. If you would like to change or add something, please let me know. (neutral/formal)
14. Would you like me to book accommodation and arrange airport pickup for Mr. Makoto?(neutral/formal)
15. I need your ideas about the ads logo. When is good for you? (neutral/formal)
16. I think you sent me the wrong file. Can you send it again? (neutral/formal)
17. I hope that helps. See you soon. (neutral/formal)
18. It would be grateful if you could book the accommodation for Mr. John and

his team on 11 – 13 May 2018. (neutral/formal)

Exercise 2

Instructions: Fill in the blanks from the words given below.

hearing meet agenda apologise make convenient
hesitate hear appointment send confirm note sorry
attached seeing

1. I look forward to you.
2. Please find our quotation for office equipment.
3. Could you us the itinerary of Mr. William please?
4. I am Mrs. Fiona's schedule is full on that day.
5. Can I have the for sales staff meeting please.
6. This is to that our Production manager Mr. Prateep Burirak will visit your factory on Monday 6th June.
7. Please that the meeting has been postponed until May 25th.
8. Would it be possible to have an with Prof. Howard on Monday?
9. I would like to for the delay of our winter collection catalogue.
10. I hope to from you soon.
11. Please do not to contact us if you need more details of our products.

12. When would be to meet Dr. Sujin please?

Exercise 3

Instructions: Improve the following emails

Email 1

I need the ticket to Paris by Friday.

.....
.....

Email 2

Tell Frank I cannot meet him at the airport.

.....
.....

Email 3

Call Jacky to cancel the appointment. I'm busy.

.....
.....

Email 4

I want the roomrate for the deluxe room.

.....
.....

Email 5

Pick me up at the airport on Monday at 10am.

.....
.....

Email 6

Come to my office tomorrow. We need to talk about the production figures.

.....
.....

Exercise 4

Instructions: Work in pairs. Write a complete email from the following situations.

Situation 1: You are a secretary. Send an email to the President, Mr. Donald Morrison to inform him about the appointment with CEO of Tetra Pak Sweden, Mr. Clark Spencer on August 23, 2018, 10.00 a.m. at the Regent Hotel Bangkok

To: morrison@yahoo.com

From:

Date:

Subject:

Dear

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

Situation 2: You are a secretary to the Finance Director. Write an email to all Head of Departments to remind them to finish the short term plan by the end of the month and email it to the Finance Director, Mr. Bruce Jones.

To:

From:

Date:

Subject:

Dear



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