Are you a **Personal Assistant**?

Learning is not only classroom

Guide for Trainers

EUPA

Validation of Formal, Non-Formal and Informal Learning: The case study of Personal Assistants

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Section 1 Trainer's guide

1.1 The background of EUPA

Based on the EU policies related to the recognition of qualifications, **EuPA's main objective is to develop a model for the recognition and validation of the qualifications of the sector of personal assistants based on learning outcomes.**

The sector of Personal Assistants (PAs) has been selected (as a case study) for the following reasons:

1. PAs often do not have academic qualifications, which makes the validation of other skills and competences a necessity.

2. Most of the inactive women, when entering the labour market, request a position as a secretary or a PA and in many cases they have no formal qualifications. Evaluation of their non-formal and informal learning will ease their access to the employment market.

3. PAs are of vital importance in every EU Company. Their role has been upgraded during the last decade.

EuPA is supporting the improvement **of flexible learning pathways, through the implementation of the European Qualifications Framework and systems for the validation of non formal and informal learning and lifelong guidance**. In this framework, EuPA developed a qualification framework based on learning outcomes and a certification based on the validation of formal, non formal and informal learning outcomes.

EuPA consists of several steps through which the qualification framework was developed, based on research that identified **not only the knowledge, skills and competences needed by a personal assistant but also the importance of different learning outcomes**. An assessment tool was also developed to assess the knowledge, skills and competences of PAs. Additionally training modules were designed, developed and implemented for different learning outcomes.

It should be noted that, through research, four different levels have been identified to match EQF levels 2,3,4 and 5 for PAs. Although designing a qualifications framework in 4 levels is an enormous amount of work, the consortium decided to design the complete qualification framework but focused only on the assessments, design of training material and reassessment of level 2.

1.2 The trainer's guide

The main objective of EUPA is to develop a model for the recognition and validation of the qualifications of the sector of personal assistants based on learning outcomes. EuPA consists of:

- A qualification framework stating the knowledge, skills and competence a personal assistant should have.
- An assessment tool that enables us to assess the knowledge, skills and competences of a personal assistant and certify her/him.
- A curriculum and training material to help the personal assistant reach the certification. Part of the training material is a pool of methodological tools to help the personal assistant develop herself on the learning outcomes of the qualification framework.

The objective of this guide is to present all the methodological tools developed under the EUPA project.

1.3 Introduction to the guide

The training material for Level 2 EUPA certification consists of 21 training modules, one module for each unit. These are presented in Table 1.

Different types of innovative methodological tools have been proposed by EUPA. These are presented in Table 2.

Methodological tool ID:	The incremental number of the tool
Methodological tool code:	The code of the tool (consisting of the LO and tool IDs)
Title of tool:	The title of the tool
Learning Outcome Number and Title:	The LO the tool relates to
Individual or group exercise:	The type of the exercise for the tool
Type of methodological tool:	The theme of the tool exercise, eg. Simulation

The following sections present:

- An index of the training material, providing the Learning Outcome numbers and titles, the work area codes and titles and the unit codes and titles, at a glance.
- The different types of the methodological tools used in EuPA and their description.
- An index presenting the methodological tools and the different types of methods used under each tool.
- An index presenting all the methodological tools, their respective Learning Outcomes, units and work areas.

1.3.1 A note to the trainer

Dear trainer,

If you are reading this guide you are probably involved in training activities for the sector of personal assistants, under the Eupa project. The EuPA Guide for Trainers contains all necessary training material for each methodological tool.

If you have any questions regarding this guide, or suggestions for improvements, please feel free to contact us on training@mmclearningsolutions.com.

We hope you find this guide useful.

The EuPA Consortium

Section 2 EUPA Training materials

2.1 Training Material at a glance

Training Material ID	Learning Outcome (LO)	Areas of work	UNIT	Learning Outcome	Level
1	**LO001**	2.1 Office Procedures	2.1.1 Handle the Mail	Be able to describe the procedure through which the organisation handles incoming and outgoing mail.	2
	LO002	2.1 Office Procedures	2.1.1 Handle the Mail	Be able to arrange incoming mail appropriately.	2
	LO003	2.1 Office Procedures	2.1.1 Handle the Mail	Be able to collect, arrange and dispatch outgoing mail accurately.	2
2	**LO004**	2.1 Office Procedures	2.1.2 Handle the Stock	Be able to explain and describe the stock control procedures that apply in the office in order for the office to run smoothly.	2
	LO005	2.1 Office Procedures	2.1.2 Handle the Stock	Be able to maintain the right level of stock needed to run the office smoothly using specific procedures and tools.	2
3	**LO006**	2.2 Office Equipment and Technology	2.2.1 Use of office equipment to carry out simple tasks including simple troubleshooting	Be able to identify the use of office equipment and services to meet different business requirements and use this equipment, carry out simple trouble shooting in accordance with health and safety legislation and regulations.	2

Training Material ID	Learning Outcome (LO)	Areas of work	UNIT	Learning Outcome	Level
4	**LO007**	2.3 Communication, Telephone Handling, Social and Relationships	2.3.1 Use of business communication skills clearly and effectively	Be able to recall the main principles of effective verbal and non verbal communication and demonstrate competence in applying these principles in a clear and effective way. Be able to perform PR activities to improve workplace relations, for example acknowledging birthdays, namedays and other special occasions.	2
5	**LO008**	2.3 Communication, Telephone Handling, Social and Relationships	2.3.2 Use telephone techniques effectively	Be able to recall the main principles of effective telephone communication and demonstrate competence in applying these principles in a clear and effective way. Be able to perform Public Relations activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions.	2
6	**LO009**	2.3 Communication, Telephone Handling, Social and Relationships	2.3.3 Understand Social Skills	Be able to understand the organisation's Codes of Conduct within the social, economic and cultural context.	2
7	**LO010**	2.3 Communication, Telephone Handling, Social and Relationships	2.3.4 Recall and apply key principles of good relationships in a clear and effective way	Be able to recall the key principles of data protection, security and confidentiality within the workplace and apply these principles effectively and efficiently.	2

Training Material ID	Learning Outcome (LO)	Areas of work	UNIT	Learning Outcome	Level
	LO011	2.3 Communication, Telephone Handling, Social and Relationships	2.3.4 Recall and apply key principles of good relationships in a clear and effective way	Be able to recall the key principles of good relationships with customers and other external stakeholders, demonstrate competence in applying these principles in a clear and effective way. Be able to perform Public Relations activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions.	2
	LO012	2.3 Communication, Telephone Handling Social and Relationships	2.3.4 Recall and apply key principles of good relationships in a clear and effective way	Be able to recall the key principles of good working relationships within the organisation and demonstrate competence in applying these principles in a clear and effective way within the organisation. Be able to perform Public Relations activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions.	2
8	**LO013**	2.4 Written Communication	2.4.1 Use written communication skills to produce a variety of business documents	Be able to recall the main principles of effective forms of written communication and demonstrate competence in applying these principles in a clear and effective way.	2
	LO014	2.4 Written Communication	2.4.1 Use written communication skills to produce a variety of business documents	Be able to produce a variety of routine business documents (based on predefined templates).	2

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Training Material ID	Learning Outcome (LO)	Areas of work	UNIT	Learning Outcome	Level
	LO015	2.4 Written Communication	2.4.1 Use written communication skills to produce a variety of business documents	Be able to communicate in writing at a level that is appropriate for business (use business terms, avoid jargon etc.).	2
9	**LO016**	2.5 Filing System Documentation and Databases	2.5.1 Use filing skills to maintain an established system	Be able to maintain established manual and electronic filing systems.	2
10	**LO017**	2.5 Filing System Documentation and Databases	2.5.2 Interpret routine business documents	Be able to prepare, interpret and check entries of routine business documents.	2
11	**LO018**	2.5 Filing System Documentation and Databases	2.5.3 Use basic database skills to enter information in a database	Be able to enter accurate and relevant data in an existing database system (electronic or manual).	2
12	**LO019**	2.6 Accounting and Financial Issues	2.6.1 Perform simple accounting/financial transactions	Be able to use Business Transaction and Payment procedures.	2
	LO020	2.6 Accounting and Financial Issues	2.6.1 Perform simple accounting/financial transactions	Be able to make payments to suppliers and receive payments from customers in conformity with organisational procedures.	2

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Training Material ID	Learning Outcome (LO)	Areas of work	UNIT	Learning Outcome	Level
13	**LO021**	2.7 Business Travel, Diary Systems, Meeting Organisation and Event Management	2.7.1 Recommend business travel and accommodation arrangements and prepare relevant documentation	Be able to recommend business travel and accommodation arrangements in accordance with a deadline and in line with budget requirements and organisational procedures.	2
	LO022	2.7 Business Travel, Diary Systems, Meeting Organisation and Event Management	2.7.1 Recommend business travel and accommodation arrangements and prepare relevant documentation	Be able to produce and collate travel documentation within an appropriate timescale in order to meet traveller's needs and legal requirements (e.g. visa procedures).	2
	LO023	2.7 Business Travel, Diary Systems, Meeting Organisation and Event Management	2.7.1 Recommend business travel and accommodation arrangements and prepare relevant documentation	Be able to state the importance of checking travel plans immediately prior to the journey and carry out the process in a clear and effective way.	2
14	**LO024**	2.7 Business Travel, Diary Systems, Meeting Organisation and Event Management	2.7.2 Prepare for a routine meeting (including meeting documentation)	Be able to prepare for a routine meeting by drawing up a simple checklist, liaising with the Chair of the meeting, and produce the relevant documents required.	2

Training Material ID	Learning Outcome (LO)	Areas of work	UNIT	Learning Outcome	Level
	LO025	2.7 Business Travel, Diary Systems, Meeting Organisation and Event Management	2.7.2 Prepare for a routine meeting (including meeting documentation)	Be able to produce all post-meeting documentation after a routine meeting and explain the organisation and support provided for meetings.	2
15	**LO026**	2.7 Business Travel, Diary Systems, Meeting Organisation and Event Management	2.7.3 Use diary systems for routine business purposes	Be able to operate an electronic diary for routine business purposes to meet the needs of workgroups and customers.	2
	LO027	2.7 Business Travel, Diary Systems, Meeting Organisation and Event Management	2.7.3 Use diary systems for routine business purposes	Be able to compare and contrast paper and electronic diary systems and report on findings to line manager.	2
	LO028	2.7 Business Travel, Diary Systems, Meeting Organisation and Event Management	2.7.3 Use diary systems for routine business purposes	Use diary systems to handle requests from others for new or modified diary entries in order to provide effective business support.	2
	LO029	2.7 Business Travel, Diary Systems, Meeting Organisation and Event Management	2.7.3 Use diary systems for routine business purposes	Be able to make accurate diary entries and maintain an up- to - date system.	2

Training Material ID	Learning Outcome (LO)	Areas of work	UNIT	Learning Outcome	Level
16	**LO030**	2.8 Visitors/ Customer Service	2.8.1 Be able to handle visitors and customers with professionalism	Be able to welcome visitors and customers in a professional manner, identify the purpose of their visit and make them feel welcome during their period of waiting.	2
	LO031	2.8 Visitors/ Customer Service	2.8.1 Be able to handle visitors and customers with professionalism	Be able to use appropriate tone and body language when dealing with visitors and customers.	2
	LO032	2.8 Visitors/ Customer Service	2.8.1 Be able to handle visitors and customers with professionalism	Demonstrate a basic understanding of customer care principles and be able to apply these in an effective way, including the ability to solve routine problems using simple rules to the satisfaction of visitors and customers.	2
17	**LO033**	2.9 ICT Skills	2.9.1 Using wordprocessing software to produce simple routine documents	Demonstrate ability to use word processing software safely and securely to produce simple documents that meet the requirements of the office.	2
18	**LO034**	2.9 ICT Skills	2.9.2 Using Spreadsheets to produce simple routine sheets	Use a spreadsheet safely and securely to enter, edit and organise numerical and other data. Select and use appropriate formulas and data analysis tools and techniques to meet the routine requirements of the office. Use tools and techniques to present, format and publish spreadsheet information.	2

Training Material ID	Learning Outcome (LO)	Areas of work	UNIT	Learning Outcome	Level
19	**LO035**	2.9 ICT Skills	2.9.3 Using Presentation software to produce simple routine presentations	Demonstrate ability to use presentation software safely and securely to produce simple electronic presentations that meet the requirements of the office and evaluate the outcomes.	2
20	**LO036**	2.9 ICT Skills	2.9.4 Using the Internet to carry out simple tasks	Demonstrate ability to connect to internet sites safely and securely using browser software and search tools including identification of relevant business sites and communicating information online as required by the office.	2
21	**LO037**	2.9 ICT Skills	2.9.5 Using email to carry out simple tasks	Demonstrate ability to use email software tools and techniques to compose and send messages; manage incoming email efficiently safely and securely to meet the requirements of the office.	2

Table 1: Training modules in EuPA Level 2

2.2 EUPA training material

Eupa training material consists of:

- a PowerPoint presentation which the trainer may use as it is or he may adopt using extra information
- methodological tools that are usually used at the end of the PowerPoint presentation
- In the case of ICT step by step notes are also used

This section presents:

1. Some icebreaking exercises to be used at the beginning of each section
2. Some hints and tips for the trainer
3. Methods of evaluation of the training modules

2.2.1 Icebreaking exercises to start your workshop

For a workshop to be successful, it is always important to build a friendly atmosphere. Some icebreakers are presented here. However, the trainers could also develop their own ice breakers which suit their personal style.

My logo

Each learner develops his/her own personal logo, ensuring that the other people in the group have not seen the logo he/she has developed. The trainer collects all logos and sticks them on the wall or on the whiteboard. People in the group are requested to guess the person to which each logo belongs to and justify why they came up with this conclusion. After that, the owner of the logo explains what the logo presents and why the specific logo matches his/her personality.

This characterises me

The trainer develops cards with adjectives like "emotional", "organised", "unorganised", "perfectionist" and so on. Each of the learners pick up a card (without seeing it at first).Then, they are requested to introduce themselves, pick up their card and explain whether or not the specific adjective characterises them and why.

The Talent Show

The trainer asks each person in the room to identify his/her talent and make a short demonstration. This talent could be, drawing, singing, dancing, having good presentation skills, or anything else they may think of. Learners introduce themselves, explain what their special talent is, and then perform their special talent for the group.

Three Questions Game

Everyone in the group writes down three questions, which he/she will make to others in the group. Not the normal "*what's you name*" type of questions, but something like "*what is your favourite sport*", or "*what is your strongest point",* or "*Name a topic you feel absolutely passionate about*".

The trainer gives the learners time to mingle, and to ask three different people in the group one of their three questions.

The trainer gathers the group back together. Have each of the learners stand and give their name. After they say their name, the trainer asks the group to tell what they know about this person.

Three facts one lie

Each of the learners writes on a small piece of paper three facts about himself or herself: Two of them are real and the third one is a lie. The group has to guess which one is the lie (and write it down). The same will take place for each of the learners in the group. The learner with the most right guesses is the group winner.

2.2.2 Hints and tips for the trainer

All the presentations and the methodological tools are available on the CD which accompanies this guide.

The following table provides the trainer with hints and tips for each training module.

Training material ID	Unit	Hints and tips
1	2.1.1 Handle the Mail	Use the presentation as it is, but ensure that you know the practices used, as well as the type of mail services available in different countries.
2	2.1.2 Handle the Stock	The presentation may be used as it is without any adaptation or customisation.
3	2.2.1 Use of office equipment to carry out simple tasks including simple troubleshooting	Use the presentation as it is. Make sure that you have the appropriate equipment in the classroom and that you know how to use it at an intermediate level, at least.
4	2.3.1 Use of business communication skills clearly and effectively	This presentation contains the minimum information needed for the specific learning outcome. You can add information on posture, face expressions etc, and you can find videos on You Tube, on which the participants can comment on body language. Moreover, you can involve the participants in more experiential exercises such as role play. This is an interesting topic; therefore the participants tend to speak more. If you cannot dedicate more time, make sure that you allocate your time appropriately.
5	2.3.2 Use telephone techniques effectively	The presentation is complete and can be used as it is. Participants may be involved in more experiential exercises, such as role plays. Moreover, there are many educational videos on telephone techniques which the trainer can use (if he/she has access to them).
6	2.3.3 Understand Social Skills	The presentation is complete and may be used as it is. The issue of the dress code is a sensitive issue and people not dressed 'appropriately' during the seminar may experience discomfort. The trainer could start his/her presentation saying that during education

Training material ID	Unit	Hints and tips
		activities the dress code is more relaxed, and then continue that he/she will talk about dress code in the business environment.
7	2.3.4 Recall and apply key principles of good relationships in a clear and effective way	This presentation may be used as it is. Issues of confidentiality are universal. If there is time, the trainer could engage the participants in discussions on what is and what is not considered to be confidential.
8	2.4.1 Use written communication skills to produce a variety of business documents	This presentation provides all necessary information on business writing tips. However, it should be adapted to the language of the learners (since different mother tongues may require different business writing tips). The trainer should provide examples of 'appropriate' and 'not appropriate' documents in the mother tongue of the learners, to help them understand different techniques.
9	2.5.1 Use filing skills to maintain an established system	The presentation may be used as it is. If there is time, the trainer could provide examples of different companies (trading company, education center etc) and ask the learners to suggest the filing system of these companies. Designing filing systems is, of course, of a higher level than level 2.
10	2.5.2 Interpret routine business documents	This presentation should be adopted according to the country since there are different requirements in the documents of different countries. The basis is the same though. The trainer should prepare himself/herself on the document requirements of different countries before the training.
11	2.5.3 Use basic database skills to enter information in a database	This presentation may be used as it is.
12	2.6.1 Perform simple accounting/financial transactions	This presentation may be used as it is.

Training material ID	Unit	Hints and tips
13	2.7.1 Recommend business travel and accommodation arrangements and prepare relevant documentation	This presentation may be used as it is. If there is available time, the trainer should engage the participants in discussions regarding risks involved in travelling, key points one should check, etc.
14	2.7.2 Prepare for a routine meeting (including meeting documentation)	The presentation may be used as it is.
15	2.7.3 Use diary systems for routine business purposes	The presentation may be used as it is. There are interesting videos on time management that the trainer could use (provided he/she has access to them). The trainer could also use more experiential exercises, such as implementation of a small project in limited time, practice on using the master list, practice in adding diary entries electronically, etc.
16	2.8.1 Be able to handle visitors and customers with professionalism	The presentation may be used as it is. The trainer should engage the learners in various role plays and ask them to note and comment on their body language, tone of voice, and so on.
17-21	2.9.1 Using wordprocessing software to produce simple routine documents 2.9.2 Using Spreadsheets to produce simple routine sheets 2.9.3 Using Presentation software to produce simple routine	The presentations may be used as they are. After the presentation, the trainer should ask the learners to go through their step - by - step notes. At this stage, the trainer will have the role of the facilitator to support the learners if they need any help. After the step by step notes, the learners should proceed with the methodological tools.

Training material ID	Unit	Hints and tips
	presentations 2.9.4 Using the Internet to carry out simple tasks 2.9.5 Using email to carry out simple tasks	

Table 2: Hints and Tips for Trainers

2.2.3 Methods of evaluating your training module

We suggest that the workshop be evaluated in two ways.

1. At the end of the module, ask each of the participants one thing they have learned or one thing that impressed them. In this way, you can identify whether they have learned.

2. To identify whether they are happy with the structure, content, training methods and the trainer himself or herself, we suggest the use of an evaluation form.

[An evaluation form to be used can be found in electronic format on the enclosed CD]

2.3 Methodological tools

2.3.1 Different types of methodological tools used in EUPA

Tool Type	Description
Written Exercise	Written exercises assess the participant's thinking, knowledge and drafting abilities. Written Exercises usually consist of open ended questions where learners are asked to demonstrate knowledge (more) and skills and competences (less) on a specific area of work. Written exercises assess the learner's thinking and knowledge, while at the same time they assess the ability of the learner to effectively express himself/herself in writing and his/her drafting abilities.
Video Analysis	An interesting tool that allows the user to use his/her judgement and comment on a video.
Simulation	Simulation is an exercise where practice activity places participants in a simulated situation requiring them to function in the capacity expected of them in a real event. Its purpose is to promote preparedness by testing policies and plans, SOPs, and personnel training.
Multiple Choice	Multiple choice exercises provide the participant with several options as an answer to a question, and the participant must select the correct one.
Group Exercise with Cards	An interesting methodological tool, in which people work together as a group to sort out a problem, using solutions found on cards.
Exercise using ICT	Practical exercises in various software programs on PCs.
Role play	Role play exercises are the imitation of a real-world scenario. These tools are exciting and fun and support the view of learning by doing. Role play is a "simulation exercise where the participants act out specified roles in a dramatization of an event or situation. The purpose of role playing is to achieve better understanding of a situation by experiencing a realistic simulation. Role playing is useful as a training exercise" (answers.com).
Group Discussion	In a group discussion, a group of people tries to sort out a problem, using discussion.

Tool Type	Description
Case Study	A very interesting methodological tool which enhances the analytical skills and the judgement of the learner, together with the specific knowledge on the topic. Thomas (2011) offers the following definition of case study: "Case studies are analyses of persons, events, decisions, periods, projects, policies, institutions, or other systems that are studied holistically by one or more methods. The case that is the *subject* of the inquiry will be an instance of a class of phenomena that provides an analytical frame — an *object* — within which the study is conducted and which the case illuminates and explicates' In other words a case study is the intensive analysis of a unit, the objective being the development of knowledge, skills and competences. A case study is a very interesting methodological tool which enhances the analytical skills and the Judgment of the learner together with the specific knowledge on the topic.
Creative Group Work	A very creative and fun method in which participants work in groups, and they are requested to demonstrate their understanding of an issue using creative methods (such as poster making, song composition, etc.)

Table 3: Types of Methodological Tools

2.3.2 Different types of methodological tools

The following table presents the methodological tools and the different types of methods used under each tool

LO code	Methodological Tool number	Methodological Tool name	Written Exercise	Video Analysis	Simulation	Multiple Choice	Group Exercise with Cards	Exercise using ICT	Role play	Group Discussion	Case Study	Creative Group Work
LO001	**1**	**Identify the company policy**									**X**	
LO002	**2**	**Handling incoming mail**			**X**					**X**		
LO003	**3**	**Handling outgoing mail**			**X**					**X**		
	4	**Handling International Mail**			**X**							
LO004	**5**	**Ordering office supplies**			**X**							
LO005	**6**	**Monitoring Stock level**								**X**		

LO code	Methodological Tool number	Methodological Tool name	Written Exercise	Video Analysis	Simulation	Multiple Choice	Group Exercise with Cards	Exercise using ICT	Role play	Group Discussion	Case Study	Creative Group Work
LO006	**7**	**Use of office equipment**			**X**			**X**		**X**		
LO007	**8**	**Hello Mr. President**		**X**								
	9	**MOOZ Exercise; Understand how to communicate verbally inside a group in a clear and effective way.**					**X**					
	10	**LISTENERS AND NON – LISTENERS** **Understand how the body language works (non verbal**							**X**	**X**		

LO code	Methodological Tool number	Methodological Tool name	Written Exercise	Video Analysis	Simulation	Multiple Choice	Group Exercise with Cards	Exercise using ICT	Role play	Group Discussion	Case Study	Creative Group Work
		communication) in a clear and effective way										
LO008	**11**	**Hold the line please**					**X**					
LO009	**12**	**Creative Social Skills**										**X**
LO010	**13**	**Shield and protection**								**X**		
LO011	**14**	**Identify different types of stakeholders. Maintain good relationships with different types of stakeholders.**			**X**					**X**		

LO code	Methodological Tool number	Methodological Tool name	Written Exercise	Video Analysis	Simulation	Multiple Choice	Group Exercise with Cards	Exercise using ICT	Role play	Group Discussion	Case Study	Creative Group Work
LO012	**15**	**Positive organisational behaviour**								**X**	**X**	
LO013	**16**	**Creative demonstration of your writing skills**										**X**
LO014	**17**	**Making an order**			**X**							
LO015	**18**	**Writing appropriately**								**X**		
LO016	**19**	**Practice Filing Systems**	**X**									
LO017	**20**	**Identify mistakes in business documents**	**X**									
LO018	**21**	**Create a simple travel agent's database**	**X**									

LO code	Methodological Tool number	Methodological Tool name	Written Exercise	Video Analysis	Simulation	Multiple Choice	Group Exercise with Cards	Exercise using ICT	Role play	Group Discussion	Case Study	Creative Group Work
LO019	22	Receipts	X									
LO020	23	Payments through the development of posters										X
LO021	24	Organise my trip to London			X							
LO022	25	Prepare the itinerary			X							
LO023	26	Eliminate the risks involved in travelling			X					X		
LO024	27	Develop your own simple checklist			X							
LO025	28	Compose post meeting	X						X			

LO code	Methodological Tool number	Methodological Tool name	Written Exercise	Video Analysis	Simulation	Multiple Choice	Group Exercise with Cards	Exercise using ICT	Role play	Group Discussion	Case Study	Creative Group Work
		documentation										
LO026	29	Using MS Outlook and a mobile phone calendar			X							
LO027	30	Spot the differences			X							
LO028	31	Please help Mary									X	
LO029	32	Maintain it up to date									X	
LO030	33	Different types of customers, always professional!							X			
LO031	34	Different scenarios of customers, always							X			

LO code	Methodological Tool number	Methodological Tool name	Written Exercise	Video Analysis	Simulation	Multiple Choice	Group Exercise with Cards	Exercise using ICT	Role play	Group Discussion	Case Study	Creative Group Work
		appropriate body language										
LO032	**35**	**A picture for customer care**										**X**
LO033	**36**	**Creating professional documents**						**X**				
LO034	**37**	**Practice the creation of spreadsheets with formulas**						**X**				
LO035	**38**	**Creating a professional presentation**						**X**				
LO036	**39**	**Internet**						**X**				
LO037	**40**	**Email**	**X**					**X**				

Table 4: The Types of Methods for each Methodological Tool

2.3.3 Pool of methodological tools (at a glance)

Training Section	Learning Outcome	Methodological Tool ID	Work Area Code	Work Area title	Unit	Learning Outcome	Methodological tool title
1	**LO001**	**1**	2.1	2.1 Office procedures	2.1.1 Handle the Mail	LO001: Be able to describe the procedure through which the organization handles incoming and outgoing mail	Identify the company policy
	LO002	**2**	2.1	2.1 Office procedures	2.1.1 Handle the Mail	LO002: Be able to arrange incoming mail appropriately	Handling Incoming mail
	LO003	**3**	2.1	2.1 Office procedures	2.1.1 Handle the Mail	LO003: Be able to collect, arrange and dispatch outgoing mail accurately	Handling Outgoing Mail
		4	2.1	2.1 Office procedures	2.1.1 Handle the Mail	LO003: Be able to collect, arrange and dispatch outgoing mail accurately	Handling International Mail
2	**LO004**	**5**	2.1	2.1 Office procedures	2.1.2 Handle the Stock	LO004: Be able to explain and describe the stock control procedures that apply in the office in order for the office to run smoothly	Ordering Office Supplies
	LO005	**6**	2.1	2.1 Office procedures	2.1.2 Handle the Stock	LO005: Be able to maintain the right level of stock needed to run the office smoothly using specific procedures and tools	Monitoring stock level

Training Section	Learning Outcome	Methodological Tool ID	Work Area Code	Work Area title	Unit	Learning Outcome	Methodological tool title
3	**LO006**	**7**	2.2	2.2 Office Equipment and Technology	2.2.1 Use of office equipment to carry out simple tasks including simple troubleshooting	LO006: Be able to identify the use of office equipment and services to meet different business requirements and use this equipment, carry out simple troubleshooting in accordance with health and safety legislation and regulations.	Use of office equipment
4	**LO007**	**8**	2.3	Communication, Telephone Handling Social and Relationships	2.3.1 Use of business communication skills clearly and effectively	LO007: Be able to recall the main principles of effective verbal and non verbal communication and demonstrate competence in applying these principles in a clear and effective way. Be able to perform PR activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions.	Hello Mr. President
		9	2.3	Communication, Telephone Handling Social and Relationships	2.3.1 Use of business communication skills clearly and effectively	LO007: Be able to recall the main principles of effective verbal and non-verbal communication and demonstrate competence in applying these principles in a clear and effective way. Be able to perform PR activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions.	MOOZ Exercise; Understand how to communicate verbally inside a group in a clear and effective way.

Training Section	Learning Outcome	Methodological Tool ID	Work Area Code	Work Area title	Unit	Learning Outcome	Methodological tool title
		10	2.3	Communication, Telephone Handling Social and Relationships	2.3.1 Use of business communication skills clearly and effectively	LO007: Be able to recall the main principles of effective verbal and non verbal communication and demonstrate competence in applying these principles in a clear and effective way. Be able to perform PR activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions.	LISTENERS AND NON – LISTENERS Understand how the body language works (non-verbal communication) in a clear and effective way
5	**LO008**	**11**	2.3	Communication, Telephone Handling Social and Relationships	2.3.2 Use telephone techniques effectively	LO008: Be able to recall the main principles of effective telephone communication and demonstrate competence in applying these principles in a clear and effective way. Be able to perform Public Relations activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions.	Hold the line please
6	**LO009**	**12**	2.3	Communication, Telephone Handling Social and Relationships	2.3.3 Understand Social Skills	LO009: Be able to understand the organisation's Codes of Conduct within the social, economic and cultural context.	Creative Social Skills
7	**LO010**	**13**	2.3	Communication, Telephone Handling Social	2.3.4 Recall and apply key principles of	LO010: Be able to recall the key principles of data protection, security and confidentiality within the workplace and apply these principles effectively	Shield and protection

Training Section	Learning Outcome	Methodological Tool ID	Work Area Code	Work Area title	Unit	Learning Outcome	Methodological tool title
				and Relationships	good relationships in a clear and effective way	and efficiently.	
	LO011	**14**	2.3	Communication, Telephone Handling Social and Relationships	2.3.4 Recall and apply key principles of good relationships in a clear and effective way	LO011: Be able to recall the key principles of good relationships with customers and other external stakeholders, demonstrate competence in applying these principles in a clear and effective way. Be able to perform Public Relations activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions.	Identify different types of stakeholders. Maintain good relationships with different types of stakeholders.
	LO012	**15**	2.3	Communication, Telephone Handling Social and Relationships	2.3.4 Recall and apply key principles of good relationships in a clear and effective way	LO012: Be able to recall the key principles of good working relationships within the organisation and demonstrate competence in applying these principles in a clear and effective way within the organisation. Be able to perform Public Relations activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions.	Positive organisational behaviour

Training Section	Learning Outcome	Methodological Tool ID	Work Area Code	Work Area title	Unit	Learning Outcome	Methodological tool title
8	**LO013**	**16**	2.4	Written Communication	2.4.1 Use written communication skills to produce a variety of business documents	LO013: Be able to recall the main principles of effective forms of written communication and demonstrate competence in applying these principles in a clear and effective way	Creative demonstration of your writing skills
	LO014	**17**	2.4	Written Communication	2.4.1 Use written communication skills to produce a variety of business documents	LO014: Be able to produce a variety of routine business documents (based on predefined templates)	Making an order
	LO015	**18**	2.4	Written Communication	2.4.1 Use written communication skills to produce a variety of business documents	LO015: Be able to communicate in writing at a level that is appropriate for business (use business terms, avoiding jargon, etc.)	Writing appropriately

Training Section	Learning Outcome	Methodological Tool ID	Work Area Code	Work Area title	Unit	Learning Outcome	Methodological tool title
9	**LO016**	**19**	2.5	2.5 Filing System Documentation and Databases	2.5.1 Use filing skills to maintain an established system	LO016: Be able to maintain established manual and electronic filing systems	Practice filing systems
10	**LO017**	**20**	2.5	2.5 Filing System Documentation and Databases	2.5.2 Interpret routine business documents	LO017: Be able to prepare, interpret and check entries of business documents	Identify mistakes in business documents
11	**LO018**	**21**	2.5	2.5 Filing System Documentation and Databases	2.5.3 Use basic database skills to enter information in a database	LO018: Be able to enter accurate and relevant data in an existing database system (electronic or manual).	Create a simple travel agent's database
12	**LO019**	**22**	2.6	2.6 Accounting and Financial Issues	2.6.1 Perform simple accounting/ financial transactions	LO019: Be able to use Business Transaction and Payment procedures	Receipts
	LO020	**23**	2.6	2.6 Accounting and Financial Issues	2.6.1 Perform simple accounting/ financial	LO020: Be able to make payments to suppliers and receive payments from customers in conformity with organisational procedures.	Payments through the development of posters

Training Section	Learning Outcome	Methodological Tool ID	Work Area Code	Work Area title	Unit	Learning Outcome	Methodological tool title
					transactions		
13	**LO021**	**24**	2.7	2.7 Business Travel, Diary Systems, Meeting Organisation and Event Management	2.7.1 Recommend business travel and accommodation arrangements and prepare relevant documentation	LO021: Be able to recommend business travel and accommodation arrangements in accordance with a deadline and in line with budget requirements and organisational procedures	Organise my trip to London
	LO022	**25**	2.7	2.7 Business Travel, Diary Systems, Meeting Organisation and Event Management	2.7.1 Recommend business travel and accommodation arrangements and prepare relevant documentation	LO022: Be able to produce and collate travel documentation within an appropriate timescale in order to meet traveller's needs and legal requirements (e.g. visa procedures)	Prepare the itinerary

Training Section	Learning Outcome	Methodological Tool ID	Work Area Code	Work Area title	Unit	Learning Outcome	Methodological tool title
	LO023	**26**	2.7	2.7 Business Travel, Diary Systems, Meeting Organisation and Event Management	2.7.1 Recommend business travel and accommodation arrangements and prepare relevant documentation	LO023: Be able to state the importance of checking travel plans immediately prior to the journey and carry out the process in a clear and effective way	Eliminate the risks involved in travelling
14	**LO024**	**27**	2.7	2.7 Business Travel, Diary Systems, Meeting Organisation and Event Management	2.7.2 Prepare for a routine meeting (including meeting documentation)	LO024: Be able to prepare for a routine meeting by drawing up a simple checklist, liaising with the Chair of the meeting, and produce the relevant documents required	Develop your own simple checklist
	LO025	**28**	2.7	2.7 Business Travel, Diary Systems, Meeting Organisation and Event Management	2.7.2 Prepare for a routine meeting (including meeting documentation)	LO025: Be able to produce all post-meeting documentation after a routine meeting and explain the organisation and support provided for meetings	Compose post meeting documentation

Training Section	Learning Outcome	Methodological Tool ID	Work Area Code	Work Area title	Unit	Learning Outcome	Methodological tool title
15	**LO026**	**29**	2.7	2.7 Business Travel, Diary Systems, Meeting Organisation and Event Management	2.7.3 Use diary systems for routine business purposes	LO026: Be able to operate an electronic diary for routine business purposes to meet the needs of workgroups and customers.	Using MS Outlook and a mobile phone calendar
	LO027	**30**	2.7	2.7 Business Travel, Diary Systems, Meeting Organisation and Event Management	2.7.3 Use diary systems for routine business purposes	LO027: Be able to compare and contrast paper and electronic diary systems and report on findings to line manager.	Spot the differences
	LO028	**31**	2.7	2.7 Business Travel, Diary Systems, Meeting Organisation and Event Management	2.7.3 Use diary systems for routine business purposes	LO028: Use diary systems to handle requests from others for new or modified diary entries in order to provide effective business support	Please help Mary

Training Section	Learning Outcome	Methodological Tool ID	Work Area Code	Work Area title	Unit	Learning Outcome	Methodological tool title
	LO029	**32**	2.7	2.7 Business Travel, Diary Systems, Meeting Organisation and Event Management	2.7.3 Use diary systems for routine business purposes	LO029: Be able to make accurate diary entries and maintain an up to date system.	Maintain it up to date
16	**LO030**	**33**	2.8	2.8 Visitors/ Customer Service	2.8.1 Be able to handle visitors and customers with professionalism	LO030: Be able to welcome visitors and customers in a professional manner, identify the purpose of their visit and make them feel welcome during their period of waiting	Different types of customers, always professional!
	LO031	**34**	2.8	2.8 Visitors/ Customer Service	2.8.1 Be able to handle visitors and customers with professionalism	LO031: Be able to use appropriate tone and body language when dealing with visitors and customers	Different scenarios of customers, always appropriate body language

Training Section	Learning Outcome	Methodological Tool ID	Work Area Code	Work Area title	Unit	Learning Outcome	Methodological tool title
	LO032	**35**	2.8	2.8 Visitors/ Customer Service	2.8.1 Be able to handle visitors and customers with professionalism	LO032: Demonstrate a basic understanding of customer care principles and be able to apply these in an effective way, including the ability to solve routine problems using simple rules to the satisfaction of visitors and customers	A picture for customer care
17	**LO033**	**36**	2.8	2.9 ICT Skills	2.9.1 Using word processing software to produce simple routine documents	LO033: Demonstrate ability to use word processing software safely and securely to produce simple documents that meet the requirements of the office	Creating professional documents
18	**LO034**	**37**	2.8	2.9 ICT Skills	2.9.2 Using Spreadsheets to produce simple routine sheets	LO034: Use a spreadsheet safely and securely to enter, edit and organise numerical and other data. Select and use appropriate formulas and data analysis tools and techniques to meet the routine requirements of the office. Use tools and techniques to present, format and publish spreadsheet information	Practice the creation of spreadsheets with formulas

Training Section	Learning Outcome	Methodological Tool ID	Work Area Code	Work Area title	Unit	Learning Outcome	Methodological tool title
19	**LO035**	**38**	2.8	2.9 ICT Skills	2.9.3 Using Presentation software to produce simple routine presentations	LO035: Demonstrate ability to use presentation software safely and securely to produce simple electronic presentations that meet the requirements of the office and evaluate the outcomes	Creating a professional presentation
20	**LO036**	**39**	2.8	2.9 ICT Skills	2.9.4 Using the Internet to carry out simple tasks	LO036: Demonstrate ability to connect to internet sites safely and securely using browser software and search tools including identification of relevant business sites and communicating information online as required by the office	Internet
21	**LO037**	**40**	2.8	2.9 ICT Skills	2.9.5 Using email to carry out simple tasks	LO037: Demonstrate ability to use email software tools and techniques to compose and send messages; manage incoming email efficiently, safely and securely to meet the requirements of the office	Email

Table 5: The methodological tools at a glance

Section 3 Pool of methodological tools

Methodological Tool ID: **1**
Methodological tool code: **EUPA_LO_001_M_001**
Title of tool: **Identify the company policy**
Learning Outcome Number and Title: **LO001: Be able to describe the procedure through which the organisation handles incoming and outgoing mail**
Individual or group exercise: Individual
Type of methodological tool: Case study

Objective of the methodological tool:

After the completion of this case study, participants will be able to:

- Understand the meaning of the term 'company policy', as far as incoming mail is concerned.

Description of the exercises:

The case study presents a typical working day of a personal assistant. Through this description the learners should be able to understand and describe the company policy regarding the incoming mail.

Exercise is accompanied by:

1. Case study

Exercise solution:

The company policy regarding the incoming mail can be summarised as follows:

1. Check the P.O. Box daily
2. Separate any personal or confidential mail
3. Open the rest of the mail items
4. Stamp them with the appropriate stamp
5. Copy the stamped items and store the copies in the 'control of documents' file
6. Record mail in the mail registry
7. Distribute the stamped items. Distribute also any private or confidential mail

Attachments to the methodological tools:

1. Case study

Ms Mary Hadson is the office administrator of a pharmaceutical company in Cyprus. It is the 1st September 2011 today, and she has arrived at the office at 07:45, fifteen minutes earlier than usual. The first thing she always does when she arrives is to check the mail, which is usually being delivered to the P.O. Box of the company between 7 and 8 o'clock in the morning.

The P.O. Box is located five minutes on foot from the office. Mary thought she wait a little bit longer before she went, to ensure that the mail will have been delivered by the postman. In the meantime, she opened the electronic mail registry, which is used to record the incoming mail, and she took the stamp out of her drawer.
At around 08:15 Mary went to the P.O. Box to pick up the mail. She picked up 12 envelopes. She came back to the office and skimmed through them to ensure that they are all addressed to the company, and also to spot any private mail. One of the letters was personal and addressed to one of her colleagues, so she put that to the side. There was also a confidential letter addressed to Mary's manager.

Mary opened all of the envelopes, except for the personal and the confidential ones. She stamped them with the appropriate stamp and filled in the details (date received, distributed to, etc.). All stamped items were then copied, and the copies were filed in the 'control of documents' file. She then completed the electronic mail registry. Afterwards, she distributed the mail (as well as the personal envelopes).

At nine o' clock, Mary's boss arrived at the office. Mary gave him the confidential letter.

[This attachment can be found in electronic format on the enclosed CD]

Methodological Tool ID:	**2**
Methodological tool code:	**EUPA_LO_002_M_002**
Title of tool:	**Handling incoming mail**
Learning Outcome Number and Title:	**LO002: Be able to arrange incoming mail appropriately**
Individual or group exercise:	Individual, Group
Type of methodological tool:	Simulation, Group discussion

Objective of the methodological tool:

After the completion of this exercise participants will be able to:

- Receive, check and sort incoming mail or packages
- Identify and deal with unwanted junk mail appropriately
- Identify and deal with suspicious items
- Appropriately arrange, sort and distribute incoming mail to recipients
- Record incoming mail

Description of the exercise:

1. Participants work in groups of 2-3. They receive 15-16 pieces of incoming mail. Their task is to sort the pieces in groups (they have to figure out on their own what some letters have in common (invitations, invoices, etc.)). Discussion follows on how the group sorted the mail, in which all members of the group are to take part.
2. Afterwards, all members of the group discuss how to handle each of the 16 items – whether to distribute it, open or not open it, who should handle the item, and what distribution system is appropriate for different types and sizes of organizations.
3. Again in small groups, participants have to think of a system that they will use to record the mail. After that, all members of the group will agree on the common system of recording and will develop a recording tool.
4. Then, each of the smaller groups will use the recording tool and record the items.
5. Finally, the trainer will give each of the smaller groups 3 letters that have been returned from the senders to the office for various reasons, and participants will discuss and decide how to handle them.

Exercise is accompanied by:

<u>Incoming Mail Documents</u>

Each group is given sixteen (16) letters which are placed in unsealed envelopes – mail can be created by the trainer or may consist of photocopies of actual letters. To ensure diversity and ability to sort, these are some suggestions:

1. Invoice for services
2. Invoice for newspaper subscription
3. Spam – advance invoice for services or goods not ordered (common spam in Slovakia)
4. Magazine – addressed to manager
5. Invitation for conference not specifically addressed
6. Direct Marketing for Office software
7. Electricity Invoice
8. Thank you letter addressed specifically to the manager
9. Invoice for car insurance - for a very large amount of money
10. Daily newspaper
11. Invitation for a congress, specifically addressed
12. Proposal for services - part of tender
13. Bank statement
14. Letter that is addressed to a different company (was sent to the wrong company)
15. Suspicious package (sender is from abroad, no stamp)
16. Confidential letter addressed to the manager

2. **Three (3) returned letters**

1. Address is wrong or invalid
2. Recipient refused to accept the mail or pick it up from the post office (related to cases in which the mail has to be signed or picked up in a limited time from the post office)
3. Recipient does not work in this company (wrong name)

4. **Mail recording system**

Mail recording system – trainer may use the template "Log for incoming mail"[1]. The trainer may suggest an Excel sheet and provide participants with an example on how to fill it in properly.

Exercise solution:

Sorting solution

The sorting solution is not important. It is not necessary for the trainer to tell participants how many groups should be created to sort the mail to. He/she should leave it up to them. Therefore, the solutions may vary.

Mail Recording Sheet (in excel or other)

It should contain (at least) these columns:

- incremental number of mail

[1] In some countries like Slovakia this is sold in specialised bookstores and some companies actually use it

- date received
- if signature is required, then the name of the person who signed the receipt
- recipient name
- sender name
- type (content) or subject
- if directly delivered to someone, was signature required? (especially in the case of couriers)
- whom it has been distributed to (name of person or department name for larger companies)

Other comments to the trainer:

Special attention should be paid on the way participants fill in the recording tool (information should be exact and complete and to the right level of detail).

Methodological Tool ID:	**3**
Methodological tool code:	**EUPA_LO_003_M_003**
Title of tool:	**Handling outgoing mail**
Learning Outcome Number and Title:	**LO003: Be able to collect, arrange and dispatch outgoing mail accurately**
Individual or group exercise:	Individual, Group
Type of methodological tool:	Simulation, Group discussion

Objective of the methodological tool:

After the completion of this exercise, participants will be able to:

- Collect, sort and prioritise outgoing mail and identify outgoing mail which is urgent
- Identify the best methods for dispatching mail
- Agree a cost for dispatching mail items
- Arrange services for collecting outgoing mail
- Record postage cost and record outgoing mail

Description of the exercise:

1. Participants work in groups of 2-3; they receive 10 numbered letters in unsealed envelopes, to be dispatched. They have to sort them in groups (they have to figure out on their own what some letters have in common (invitations, invoices, etc.)). Group discussion follows.
2. The second task is for participants to decide which method of posting they should use (there are different options based on each county). Group discussion follows. Key issues to be discussed include parameters that should affect participant decision on the method of posting (budget, urgency, importance). Discussion should also cover which mail is suitable to be sent as e-mail and which has to be sent via post.
3. Furthermore, participants have to develop a system/tool for recording outgoing mail. After the group agrees on a common system of recording, each group will have to record the mail using the tool.

Exercise is accompanied by:

1. **<u>Outgoing mail documents</u>**

Ten (10) "outgoing" documents per group (created by the trainer or photocopies of actual letters). To ensure diversity and ability to sort, these are some suggestions for types of documents to be used:

1. Invoice for services to a local company
2. Invitation for a manager of an associate company to attend our company event
3. Thank you letter to a non-governmental organization for a donation they have made
4. Invoice for services (to a company abroad)
5. Proposal/tender for services (to be sent to a local customer)

6. Receipt of payment (local customer)
7. Order of hotel facilities used
8. Invitation for a company to tender for services
9. Proposal/tender for services (to be sent to a foreign customer)
10. Signed contract for services (returning it back to business partner)

Each of the documents should be in an unsealed envelope with the recipient details on the envelope.

Mail recording system

Trainer may use a template for "Outgoing mail Log" or a similar one

Trainer may suggest an Excel sheet or a Word document and provide participants with an example

Exercise solution:

Sorting Solution

The sorting solution is not important. It is not necessary for the trainer to tell participants how many groups should be created to sort the mail to. This should be left up to the participants, therefore solution may vary.

Mail Recording sheet (in excel or other software)

It should contain (at least) these columns:

- Incremental no. of mail
- internal dispatching date
- priority
- sender (from whom - who signs the document)
- recipient
- address of recipient
- post code (if special service was used – enables to track the mail)
- type (content) or subject
- type of mail service required (regular mail, express mail, courier)
- costs/budget
- external dispatching date

Other comments to the trainer:

Special attention should be paid on the way participants fill in the recording tool (information should be exact and complete and to the right level of detail).

Methodological Tool ID: **4**
Methodological tool code: **EUPA_LO_003_M_004**
Title of tool: **Handling International Mail**
Learning Outcome Number and Title: **LO003: Be able to collect, arrange and dispatch outgoing mail accurately**
Individual or group exercise: Group
Type of methodological tool: Simulation

Objective of the methodological tool:

After the completion of this exercise, participants should be able to:

- Identify the best methods for dispatching national and international mail
- Agree a cost for dispatching mail items
- Arrange services for collecting outgoing mail

Description of the exercise:

Participants are given 5 examples of outgoing mail (sealed envelopes or packages with pre - written addresses):

1. Letter - addressed to the USA, which needs to be delivered within a week
2. Package (large envelope containing 120 sheets of paper) - needs to be delivered to Germany, within 3 weeks, and contains extremely important documents
3. Letter – addressed nationally, needs to be delivered on the same day
4. Package - approximately 4 kg, needs to be send to China within 2 weeks (measurements 30*50*50 cm)
5. Letter – national, no special importance or priority

Participants have to figure out the best method to dispatch (time, cost efficiency, insurance, reliability)

- Participants need to have internet connection and telephone at their disposal
- They will have to search, inquire for, and find out real information and decide, based on the information found, on the best method to be used to send the mail
- Discussion follows

Exercise is accompanied by:

1. Participants must be provided with pre - prepared boxes and envelopes (the number of sheets, the size and the weight in kilograms have to be identified and given to participants. This is important because, for the price to be calculated, the exact weight and size of the package must be measured). Addresses can be real, but recipients fictional.

Exercise solution:

Varies in different countries – trainer has to check for the information on national post services and courier companies operating in the country (city) to prepare the correct answers.

Methodological Tool ID:	**5**
Methodological tool code:	**EUPA_LO_004_M_005**
Title of tool:	**Ordering office supplies**
Learning Outcome Number and Title:	**LO004: Be able to explain and describe the stock control procedures that apply in the office in order for the office to run smoothly**
Individual or group exercise:	Group
Type of methodological tool:	Simulation

Objective of the methodological tool:

After the completion of this exercise the participants will be in a position to:

- Explain and describe the stock control procedures that apply in the office in order for the office to run smoothly
- Outline the procedure used for ordering from a specific supplier

Description of the exercise:

Ordering office supplies

Participants receive six (6) emails with requests from the manager and colleagues regarding orders of items, like stationery.

- A group discussion follows about the possible company policies (who is responsible for each type of stock, depending on the size of the company, when to ask manager for permission to order (amount, price, etc.)).
- Participants form small groups (3-4) and go through these requests, prepare a list of items to be ordered, and then search the internet and call several suppliers to receive more information about the process and conditions of ordering from them. After that, the group reports their findings to the trainer, who then compares and summarizes findings from the groups, if they are different.
- Each participant is asked to prepare a written order. The trainer then asks participants to read their orders, and gives comments on the wording, level of detail, structure etc.

Exercise is accompanied by:

1. **Six (6) requests (should be on separate pieces of paper and in the local language)**
   1. Ink pen Parker Brand; 6 Highlighters different colours; Leather computer case; Post it notes
   2. 120 Envelopes A4, 12 blue pens, scissors, large stapler
   3. Labels, Envelopes, 30 Post stamps, Business card holder, Post it notes-large
   4. Milk, calculator, stapler
   5. Address Book , Table calendar, Highlighters, Scissors
   6. Magnetic wall board and Magnets, Pencils (at least 12), Whiteboard markers-3 sets

EUPA
Validation of Formal, Non-Formal and Informal Learning: The case study of Personal Assistants

2. Equipment in the training room

Computers with internet connection and phone should be available for the participants to use during the simulation.

Exercise solution:

No right solution - learners should notice that the orders are not very specific and they should ask for more details to ensure that the order will be correct. They should also discuss whether the person needs those for his/her work, whether they should order more of those items to have in stock etc.

Other comments to the trainer:

Depending on the size of the company and the person's own responsibilities, he/she may have to order office supplies for himself/herself, the department, or the entire business. He/She can purchase supplies at an office supply store in person or by ordering over the phone, via fax, or via mail, choosing from an office supply catalogue. He/she can also use office supply websites (the trainer should include common websites in his/her country). Purchases can be shipped or delivered.

When one determines an order, he/she should not overestimate their needs. A multiple-item discount is not always useful, because certain items (such as beverages and snacks) cannot be stored for too long. Administrative personnel should keep an inventory of supplies and when they use them. A logbook is a useful way to keep a record of supplies used. In addition to everyday supplies like pens, pencils, staples, paper clips, and file folders, special consideration may be required before ordering other items. For example, fax paper, computer printer toner or ink cartridges, computer CDs, copier replacement cartridges or toner, and copier paper must be ordered with your exact office equipment in mind.

Office supplies should be kept on shelves in a supply cabinet or file cabinet. If co-workers have access to these supplies, consider labelling the shelves to keep them organized. Keep the supply storage area orderly and clean. Items that you use most often should be stored at eye level, where they are easy to see and reach. Those that might spill should be kept on a lower shelf. Try to keep the label from the original packaging attached to the supplies; the information is helpful when reordering the item. For the same reason, keep opened reams of copier and office paper inside the wrapper, leaving the label on one end. There are many different types and weights of office paper, and some are better suited for certain applications than others. Saving the label helps ensure that you have the right product for the job.

The following is a list of common office supplies listed by type:

Audiovisual Equipment and Supplies

- Audiovisual equipment and accessories
- Laminating equipment and supplies
- Binding equipment and supplies

- Message boards, signs, and lettering
- Business presentation tools and supplies
- Wallboards
- Graphic arts and drafting supplies

Basic Supplies and Labels

- Adhesives and tape dispensers
- Message pads, memo books, cash boxes, coin handling, and Post-it Notes™

Key Control Items

- Name tags and tickets
- Clips, pushpins, fasteners
- Paper punches and trimmers
- Rubber bands
- Safes and security items
- Correction fluid and tape
- Stamps and stamp pads
- Labels
- Staplers and staples
- Mailroom supplies

Break room and Safety

- Beverage dispensers
- Cold beverages
- Break room appliances
- Cups, plates, and utensils
- Coffee and hot beverages
- First aid supplies
- Safety products
- Clocks
- Snacks

Business Cases

- Attaché cases
- Computer and multi-use cases
- Backpacks Portfolios
- Briefcases
- Ring-folios and pad holders
- Business card holders and accessories
- Travel accessories

- Catalogue and sample cases

Calendars and Planners

- Address books
- Organizer books
- Appointment books
- Telephone books
- Calendars
- Wall planners
- Organizer book refills and accessories

Cleaning Supplies

- Air fresheners
- Glass cleaners
- Bathroom cleaners
- Mops and buckets
- Brooms and dustpans
- Soap and hand cleaners
- Brushes and dusters
- Sponges and squeegees
- Floor and carpet cleaners
- Trash cans and liners
- General office cleaners
- Vacuums

Custom Printing

- Business and human resource forms
- Engraved products
- Business cards
- Envelopes
- Business stationery
- Labels
- Custom stamps
- Specialty imprints

Filing, Binding, and Storage

- Binder accessories
- Indexes
- Binders
- Portfolios

- Boxes
- Reference systems
- Catalogue racks
- Report covers
- Dividers for binders
- Sheet protectors
- Files
- Tabs
- Index cards

Hardware

- Air purifiers
- Key control items
- Batteries
- Ladders and stools
- Extension cords
- Light bulbs
- Fans
- Tools
- Hand trucks
- Utility cabinets
- Heaters

Organizers and Desk Accessories

- Bookends
- Desktop sorters
- Cord and cable management supplies
- Desktop, wall, and floor literature holders
- Desk pads and blotters
- Hanging wall files
- Desk trays
- Partition organizers
- Desktop and drawer organizers
- Surface protectors
- Desktop collections

Paper, Forms, and Envelopes

- Blank certificates
- Paper
- Business forms

- Paper rolls
- Card products
- Photo and specialty paper
- Clipboards
- Record-keeping materials
- Document Covers
- Seals
- Envelopes
- Tax forms
- Notebooks
- Writing pads
- Pens, pencils, and markers
- Erasers
- Pencil Sharpeners
- Highlighters

Printer and Fax Supplies

- Inkjet cartridges and supplies
- Laser toner cartridges and supplies
- Thermal printer supplies

Restroom Paper Supplies

- Bathroom tissue
- Paper towels and dispensers
- Facial tissue
- Wipes and towels
- Napkins and dispensers

Methodological Tool ID:	**6**
Methodological tool code:	**EUPA_LO_005_M_006**
Title of tool:	**Monitoring Stock level**
Learning Outcome Number and Title:	**LO005: Be able to maintain the right level of stock needed to run the office smoothly using specific procedures and tools**
Individual or group exercise:	Group
Type of methodological tool:	Group discussion

Objective of the methodological tool:

After the completion of this exercise, participants will be able to:

- Maintain the right level of stock needed to run the office smoothly
- Maintain stationery stock items to the required level
- Keep up to date, accurate and legible records of stock delivered and held

Description of the exercise:

At first, the trainer writes these questions on the flipchart (or develops question cards to give to each of the groups):

1. Why is it important to monitor the stock?
2. What are the consequences of inefficient stock monitoring?
3. How would you monitor the stock?
4. How would you decide what level of stock is appropriate?
5. What tools of monitoring would you use?

Participants are divided in small groups, to discuss and prepare answers for the questions. Each group shares their answers with the whole class afterwards. Discussion follows.

Exercise is accompanied by:

1. Background material for the trainer to be used during the lecture.

Other comments to the trainer:

Stock control for production, scheduling and ordering inventory is a core part of managing a business enterprise. Warehouse managers use a variety of stock review techniques that can range from the simplest to the most complex models. The goal of any stock control method, nevertheless, is to maintain efficient inventory that ensures that products and goods are replenished in a timely manner.

Stock control methods

There are several methods for controlling stock, all designed to provide an efficient system for deciding what, when and how much to order.

You may opt for one method or a mixture of two or more if you have various types of stock.

- **Minimum stock level** - you identify a minimum stock level and re-order when stock reaches that level. This is known as the Re-order Level.
- **Stock review** - you have regular reviews of stock. At every review, you place an order to return stocks to a predetermined level.

Basic Forecasts

A simple stock order forecast reviews historical data which allows demand patterns to be measured, in order to determine the number of days it takes for a particular quantity of an item to sell or to be consumed. The forecast then calculates the number of days it takes for the items to be replenished, either through the production or the supplier delivery. Warehouse managers who understand the speed with which an item sells out or is consumed, but also the amount of time it takes for an order to be delivered or replenished through production, can identify the stock amount that triggers a re-order, also called an order point.

Just In Time

Just in time, or JIT, is a cost-cutting inventory control method used frequently in the manufacturing industry to maintain the absolute minimum stock levels. Inventory is ordered when it is needed with the goal of reducing holding or carrying costs. The reliability of a supplier's delivery times is central to efficient JIT operations. If supplier delivery times are not predictably consistent, warehouse management will not be able to use this important factor in JIT forecasting and runs the risk of frequent stock shortages.

Inventory Control Software

Inventory control software automates warehouse stock systems and helps managers to track inventory levels. Stock control software programs generally include systems that notify managers when stock items fall below order points. When order points are triggered, computer tracking systems can place reorders.

Fixed Order Quantities

When an order point occurs, an FOQ is a specific inventory quantity used in stock control administration. Absolute supply quantity and time supply quantity are two kinds of FOQs. An absolute supply quantity directs that a specific number of items be reordered when an order point is triggered. A time supply quantity directs that a specific number of days' supply of an item be reordered.

Economic Order Quantity

Economic order quantity, or EOQ, is a stock control and production scheduling method that aims to establish stock quantities at the lowest possible costs. The EOQ formula uses factors such as a stock item's fixed cost, annual turnover rate and storage and delivery costs to make complex calculations that establish the optimal stock level for an item.

How much stock should you keep?

Keeping little or no stock and negotiating with suppliers to deliver stock as you need it.

Advantages	**Disadvantages**
Efficient and flexible - you only have what you need, when you need it	Meeting stock needs can become complicated and expensive
Lower storage costs	You might run out of stock if there's a hitch in the system
You can keep up to date and develop new products without wasting stock	You are dependent on the efficiency of your suppliers

This might suit your business if it is in a fast-moving environment where products develop rapidly, the stock is expensive to buy and store, the items are perishable or replenishing stock is quick and easy.

Keeping lots of stock

Advantages	**Disadvantages**
Easy to manage	Higher storage and insurance costs
Low management costs	Certain goods might perish
You never run out	Stock may become obsolete before it is used
Buying in bulk may be cheaper	Your capital is tied up

This might suit your business if sales are difficult to predict (and it is hard to pin down how much stock you need and when), you can store plenty of stock cheaply, the components or materials you buy are unlikely to go through rapid developments or they take a long time to re-order.

Stock control systems - keeping track manually

Stocktaking involves making an **inventory**, or list, of stock, and noting its location and value. It is often an annual exercise - a kind of audit to work out the value of the stock as part of the accounting process.

Codes, including barcodes, can make the whole process much easier, but it can still be quite time consuming. Checking stock more frequently - a rolling stock take – prevents a massive annual exercise, but demands constant attention throughout the year. Any stock control system must enable you to:

- track stock levels
- make orders
- issue stock

The simplest manual system is the **stock book**, which suits small businesses with few stock items. It enables you to keep a log of stock received and stock issued.

It can be used alongside a simple **reorder system**. For example, the two-bin system works by having two containers of stock items. When one is empty, it is time to start using the second bin and order more stock to fill up the empty one.

Stock cards are used for more complex systems. Each type of stock has an associated card, with information such as:

- description
- value
- location
- reorder levels, quantities and lead times (if this method is used)
- supplier details
- information about past stock history

More sophisticated manual systems incorporate **coding** to classify items. Codes might indicate the value of the stock, its location and which batch it is from, which is useful for quality control.

Stock control systems - keeping track using computer software

Computerised stock control systems run on similar principles to manual ones, but are more flexible and information is easier to retrieve. You can quickly get a stock valuation or find out how well a particular item of stock is moving.

A computerised system is a good option for businesses dealing with many different types of stock.

There are many software systems available. Upon your requirements, they allow various functions. For example, your needs might include:

- multiple prices for items
- prices in different currencies
- automatic updating, selecting groups of items to update, single-item updating
- using more than one warehouse
- ability to adapt to your changing needs
- quality control and batch tracking
- integration with other packages
- multiple users at the same time

Avoid choosing software that is too complicated for your needs, as this will be a waste of time and money.

Stock control administration

There are many administrative tasks associated with stock control. Depending on the size and complexity of your business, they may be done as part of an administrator's duties, or by a dedicated **stock controller**.

For security reasons, it is a good practice to have different staff responsible for finance than those responsible for stock.

Typical paperwork to be processed includes:

- delivery and supplier notes for incoming goods
- purchase orders, receipts and credit notes
- returns notes
- requisitions and issue notes for outgoing goods

Figures should be checked systematically, either through a regular audit of stock - **stocktaking** - or an ongoing programme of checking stock - **rolling stock take**.

If the figures do not add up, you need to investigate, as there could be stock security problems or a failure in the system.

Stock security

Keeping stock secure depends on knowing what you have, where it is located and how much it is worth - so good records are essential. Stock that is portable, does not feature the business logo, or is easy to sell on, is at particular risk.

Thieves and shoplifters

A thief coming in from outside is an obvious threat. Check the security around your premises to keep the risk to a minimum.

Theft by staff

Theft by employees is a problem. To prevent this:

- Train staff about your security systems and your disciplinary policies and procedures. Training about the cost of stock theft will help, as many people are not aware of the implications for company turnover and job security.
- Set up procedures to prevent theft. Staff with financial responsibilities should not be in charge of stock records. Restrict access to warehouses, stockrooms and stationery cupboards.

Methodological Tool ID:	**7**
Methodological tool code:	**EUPA_LO_006_M_007**
Title of tool:	**Use of office equipment**
Learning Outcome Number and Title:	**LO006: Be able to identify the use of office equipment and services to meet different business requirements and use this equipment, carry out simple trouble shooting in accordance with health and safety legislation and regulations**
Individual or group exercise:	Individual, Group
Type of methodological tool:	Simulation, Exercise using ICT, Group discussion

Objective of the methodological tool:

After this exercise the participants will be in a position to:

- Identify different types of equipment and their use
- Select the equipment needed for specific tasks
- Use the equipment according the manufacturer's guidelines
- Keep the equipment clean and safe in compliance with health and safety standards
- Deal with problems that may arise following manufacturer's guidance
- Perform basic tasks with the Fax, Photocopier, Binding Machine, Scanner, Printer and Telephone system

Description of the exercise:

This exercise consists of several parts:

First, there is a discussion about the use of different types of equipment. Afterwards the participants will try to perform basic troubleshooting using guidance from the manuals.

Later, they will use some types of office equipment:

1. The Telephone - answering a call, redial function, transferring the call, putting a call on hold
2. The Fax machine - sending a fax, receiving a fax
3. The Photocopier - loading paper, one side or duplex photocopy, colour, zooming in or out, using feeder
4. The Printer - black and white or colour print, one side and duplex, 2 pages on one paper, brochure printing
5. The Scanner - colour and black and white, scanning to .jpg and .pdf formats, scanning each page individually or as a continuous document, using feeder, scanning two-sided documents
6. The Binding machine - Binding documents

Exercise solution:

The learners must demonstrate correct usage of equipment as well as simple troubleshooting.

Other comments to the trainer:

The trainers should point out to learners that there are different types of manufacturers and office equipment. Although the principles are quite similar, learners should always test/ ask about the use of every single piece of equipment before performing a certain task.

Exercise is accompanied by:

1. <u>The following types of office equipment (or most of them) should be available during the training</u>

1. Computer with installed printer and scanner drivers
2. Photocopier with duplex, colour – can be part of a multifunctional device
3. Scanner – can be part of a multifunctional device
4. Fax – can be part of a multifunctional device
5. Printer with duplex, color – can be part of multifunctional device
6. Telephone system - call transfer, put on hold and redial function
7. Binding machine
8. User Manuals for equipment used, preferably in local language
9. Paper supplies and binding machine supplies

Methodological Tool ID:	**8**
Methodological tool code:	**EUPA_LO_007_M_008**
Title of tool:	**Hello Mr. President**
Learning Outcome Number and Title:	**LO007: Be able to recall the main principles of effective verbal and non-verbal communication and demonstrate competence in applying these principles in a clear and effective way. Be able to perform PR activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions**
Individual or group exercise:	Group
Type of methodological tool:	Video analysis

Objective of the methodological tool:

After the completion of this exercise the participants will be able to:

- Understand the importance of effective verbal communication

Description of the exercise:

This methodological tool involves watching a very simple and funny video and discussing shortly on the importance of effective communication.

Exercise is accompanied by:

1. A video, downloaded from You Tube (http://www.youtube.com/watch?v=zp23cMni2eY)

Exercise solution:

This exercise also serves as an icebreaker due to the funny nature of the video. After the video, the trainer should ask the participants to discuss what was causing the miscommunication. The exercise should last approximately 5 min.

Attachments to the methodological tools:

The link to a video on You Tube (http://www.youtube.com/watch?v=zp23cMni2eY)

[This attachment can be found in electronic format on the enclosed CD]

Methodological Tool ID:	**9**
Methodological tool code:	**EUPA_LO_007_M_009**
Title of tool:	**MOOZ Exercise; Understand how to communicate verbally inside a group in a clear and effective way.**
Learning Outcome Number and Title:	**LO007: Be able to recall the main principles of effective verbal and non-verbal communication and demonstrate competence in applying these principles in a clear and effective way. Be able to perform PR activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions**
Individual or group exercise:	Group
Type of methodological tool:	Group exercise with cards

Objective of the methodological tool:

After the completion of this exercise the participants will be able to:

- Name and describe the rules of effective communication
- Name and describe the barriers to effective communication

Description of the exercise:

Tips for the trainers

The zooming exercise starts from the clouds and finishes on earth.

The trainers should not explain how the ZOOM exercise works; Participants have to figure out by themselves what to do.

First part

Give all the colour printed cards to the participants in a random way. Depending on the number of the participants some of them might get more than one card.

Second Part

Tell the participants that the exercise is like playing a card game. No one is allowed to see each others cards. They can only *describe* them, and through description they must try to find a logical sequence or form a story using them.

After coming into a conclusion about the order of the cards, participants should place them on the table with the picture facing downwards so that the players do not see the cards.

Once the cards are back on the table, the trainer should inform the participants that they cannot take back the cards or rearrange them. Only the trainer in the end of the exercise should do it in order to explain the task.

Please, give the participants around 15'- 20' minutes to complete their task. The maximum time to complete the exercise, in case they have problems, is 30 minutes.

Exercise is accompanied by:

1. Thirty (30) coloured picture cards

Exercise solution:

The trainer will figure out if there are any Communication Barriers among the participants. Then he/she will explain to the participants how communication channels work. Additionally, the importance of effective questioning techniques will be stressed, how the lack of proper information can make someone creative or not, how to overcome any difficulties, etc.

Other comments to the trainer:

Print the coloured cards. This exercise will help participants to develop their communication skills.

In case the group cannot implement their tasks easily, the trainer can pause the clock for ten (10) minutes to guide the group. During the pause, the trainer can help them understand any communication problems they might have in order to come into a conclusion.

Then the exercise can continue normally.

Attachments to the methodological tools:

1. <u>Thirty (30) coloured picture cards</u>

[This attachment can be found in electronic format on the enclosed CD]

Methodological Tool ID: **10**

Methodological tool code: **EUPA_LO_007_M_010**

Title of tool: **LISTENERS AND NON – LISTENERS Understand how the body language works (non verbal communication) in a clear and effective way**

Learning Outcome Number and Title: **LO007: Be able to recall the main principles of effective verbal and non-verbal communication and demonstrate competence in applying these principles in a clear and effective way. Be able to perform PR activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions**

Individual or group exercise: Group

Type of methodological tool: Role play, Group discussion

Objective of the methodological tool:

After the completion of this exercise the participants will be able to:

- Understand the principles and importance of active listening
- Name and describe the rules of effective communication
- Name and describe the barriers to effective communication

Description of the exercise:

Role play

This role play is divided in three (3) parts:

1. Not-Listening
2. Listening
3. Active Listening

The trainer asks the participants to form groups of two (2) persons.

One of the participants follows the trainer outside of the classroom and is being told to make a short story and tell it later to the other member of the group.

Meanwhile, the trainer asks the remainder of the participants to ignore the first part of the story they will listen (not-listening part).

On the second part, when the trainer secretly gives them a sign (e.g. blinking of the eye, etc.) they should start listening 'passively' to their partner (paying attention, looking at them, but not disturbing - listening part).

On the third part, when the trainer gives another sign, they should start listening "appropriately" - using nonverbal communication body language techniques and asking questions (active listening part).

1. Review:

After the exercise the first group explains how they felt during the role play, and what changes they observed in the behaviour of their partner. The partners on the other end describe what their task was and what they have been doing.

2. Lecture:

The trainer explains the difference between listening and active listening and also explains active listening techniques.

Exercise is accompanied by:

1. Trainer Material
2. Additional exercise (face to face exercise)

Exercise solution:

Understand the principles and importance of active listening.
See the attached document on active listening (Trainer Material).
Alternatively or additionally you can use the attached exercise, Face to Face.

Attachments to the methodological tools:

1. **Trainer material**

The participants should not know in the beginning that the purpose of the exercise is to identify the three stages of listening (not listening - listening - active listening).

Active listening

Is a communication technique that requires the listener to understand, interpret, and evaluate what (s)he hears. The ability to listen actively can improve personal relationships through reducing conflicts, strengthening cooperation, and fostering understanding.

When interacting, people often do not listen attentively. They may be distracted, thinking about other things, or thinking about what they are going to say next (the latter case is particularly true in conflict situations or disagreements). Active listening is a structured way of listening and responding to others by focusing attention on the speaker. Suspending one's own frame of reference, suspending judgment and avoiding other internal mental activities, are important to fully attend to the speaker.

It is important for a listener to observe the speaker's behavior and body language. Having the ability to interpret a person's body language lets the listener develop a more accurate understanding of the speaker's message. When the listener does not respond to the speaker's nonverbal language, (s)he engages in a content-only response which ignores the emotions that guide the message. Having heard, the listener may then paraphrase the speaker's words. It is important to note that the listener is not necessarily agreeing with the speaker—simply stating what was said. In emotionally charged communications, the listener may listen for feelings. Thus, rather than merely repeating what the speaker has said, the active listener might describe the underlying emotion ("You seem to feel angry," or "You seem to feel frustrated, is that because ... ?").

Individuals in conflict often contradict each other. This has the effect of denying the validity of the other person's position. Ambushing occurs when we listen to someone else's argument for its weaknesses and ignore its strengths. The purpose is to attack the speaker's position and support your own. This may include a distortion of the speaker's argument to gain a competitive advantage. Either party may react defensively, and they may lash out or withdraw. On the other hand, if one finds that the other party understands, an atmosphere of cooperation can be created. This increases the possibility of collaborating and resolving the conflict.

A four-step process (termed "Nonviolent Communication" or "NVC")—conceived by Marshall Rosenberg—can help facilitate active listening. "When we focus on clarifying what is being observed, felt, and needed [and requested] rather than on diagnosing and judging, we discover the depth of our own compassion. Through its emphasis on deep listening—to ourselves as well as others—NVC fosters respect, attentiveness, and empathy, and engenders a mutual desire to give from the heart." Rosenberg further clarifies the intricacy of perception and adaptiveness of what he calls "deep listening" by saying, "While I conveniently refer to NVC as a 'process' or 'language,' it is possible to express all four pieces of the model without uttering a single word. The essence of NVC is to be found in our consciousness of these four components, not in the actual words that are exchanged."

To enhance your listening skills, you need to let the other person know that you are listening to what he or she is saying. To understand the importance of this, ask yourself if you've ever been engaged in a conversation when you wondered if the other person was listening to what you were saying. You wonder if your message is getting across, or if it's even worthwhile continuing to speak. It feels like talking to a brick wall and it's something you want to avoid.

Acknowledgement can be something as simple as a nod of the head or a simple "uh huh." You aren't necessarily agreeing with the person, you are simply indicating that you are listening. Using body language and other signs to acknowledge you are listening also reminds you to pay attention and not let your mind wander.

You should also try to respond to the speaker in a way that will encourage him or her to continue speaking, so that you can get the information you need. While nodding and "uh huhing" says you're interested, an occasional question or comment to recap what has been said communicates that you understand the message as well.

<u>Becoming an Active Listener</u>

There are five key elements of active listening. They all help you ensure that you hear the other person, and that the other person knows you are hearing what they say.

1. Pay attention.

Give the speaker your undivided attention, and acknowledge the message. Recognize that non-verbal communication also "speaks" loudly.

- Look at the speaker directly.
- Put aside distracting thoughts. Don't mentally prepare a rebuttal!
- Avoid being distracted by environmental factors.
- "Listen" to the speaker's body language.
- Refrain from side conversations when listening in a group setting.

2. Show that you are listening.

Use your own body language and gestures to convey your attention.

- Nod occasionally.
- Smile and use other facial expressions.
- Note your posture and make sure it is open and inviting.
- Encourage the speaker to continue with small verbal comments like "yes" and "uh huh".

3. Provide feedback.

Our personal filters, assumptions, judgments, and beliefs can distort what we hear. As a listener, your role is to understand what is being said. This may require you to reflect what is being said and ask questions.

- Reflect what has been said by paraphrasing. "What I'm hearing is..." and "Sounds like you are saying..." are great ways to reflect back.
- Ask questions to clarify certain points. "What do you mean when you say....?" "Is this what you mean?"
- Summarize the speaker's comments periodically.

4. Defer judgment.

Interrupting is a waste of time. It frustrates the speaker and limits full understanding of the message.

- Allow the speaker to finish.
- Don't interrupt with counter arguments.

5. Respond Appropriately.

Active listening is a model for respect and understanding. You are gaining information and perspective. You add nothing by attacking the speaker or otherwise putting him or her down.

- Be candid, open, and honest in your response.
- Assert your opinions respectfully.
- Treat the other person as he or she would want to be treated.

Active Listening Techniques

Open questions

Rather than asking questions which only require a yes or no answer, try and ask open questions. For example, instead of saying: 'Has this been going on a long time?', ask 'How long has this been going on?'. That way, instead of closing the conversation down into a yes or no response, you open it out and encourage the other person to keep talking. Another good example to remember is instead of saying "is everything ok?" you can ask "how are things going?".

Summarising

This helps to show that you've listened to, and understood, what's been said. For example, 'I understand you are feeling very stressed, but remember you love your job.'

Reflecting

Repeating back a word or phrase can encourage people to go on. If someone says, 'So it's been really difficult recently,' you can keep the conversation going simply by repeating 'Difficult…'.

Clarifying

We all skirt around or gloss over the most difficult things. If we can avoid saying them, we will. If the person you're speaking with glosses over an important point, saying 'Tell me more about…', or '…sounds a difficult area for you' can help both of you clarify the points. It sounds obvious, but a 'Yes', 'Go on', or 'I see' can really give some much needed encouragement.

Reacting

You do not have to be completely neutral. If whoever you are talking with has been having an absolutely dreadful time, some sympathy and understanding is vital. 'That must have been difficult' – this really helps.

1. **Additional exercise (if there is time)**

FACE TO FACE EXERCISE

This exercise requires your full concentration and attention. Sit face to face with a partner. First observe the facial expression, the mood, the gaze of the other person. Then ask your partner to give you a sentence for you to reflect back to him.

Your partner tells you a sentence or two. You listen, understand, think about it and reflect it back to your partner using *your own* words.

Ask your partner if you reflected the message correctly. Ask him if you were in tune with his feelings and mood. If you successfully completed this exercise, your (reflective) listening will make your partner feel that you have *listened and that they have been understood*.

Sit face to face with someone else. Your partner says a short sentence; you listen to it, and render it back using similar words and sentence structure. Rearrange words or substitute words to give the message back to you partner. Ask the speaker if the message is still the same. Ask your partner if you were able to paraphrase or if you are just repeating. If the speaker tells you that you are just repeating, dare to move words around and to replace them with synonyms until you can successfully paraphrase what your speaker said.

Take turns with your partner, practice this paraphrasing exercise until you both feel you are good at paraphrasing a message.

[This attachment can be found in electronic format on the enclosed CD]

Methodological Tool ID:	**11**
Methodological tool code:	**EUPA_LO_008_M_011**
Title of tool:	**Hold the line please**
Learning Outcome Number and Title:	**LO008: Be able to recall the main principles of effective telephone communication and demonstrate competence in applying these principles in a clear and effective way. Be able to perform Public Relations activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions**
Individual or group exercise:	Group
Type of methodological tool:	Group exercise with cards

Objective of the methodological tool:

After the completion of this exercise the participants will be able to:

- Communicate, speak and use the telephone effectively

Description of the exercise:

The goal of the exercise is to help the participants speak clearly and appropriately during a phone call.

Before the exercise:

- Make photocopies of the attached cards.
- Then cut them.

When the exercise starts:

- Form two (2) groups.
- Give randomly the twenty (20) small cards to the participants. (Ten (10) cards to each group).

During the exercise:

The participants have to match the given cards in order to make an appropriate telephone conversation. In case they cannot match the right ones, they get excluded from the game.

One of the participants reads out his/her card. The rest of the players must check their cards and read out a related statement. There are statements that are appropriate and statements that are not appropriate. If a player reads out an inappropriate statement, even if it matches the initial statement, he/she is being excluded from the game.

For example, one participant goes:

- This is Katerina Ravenidou.

The person who has the card *"Who is calling please*" will respond and will gain the other card also. However, if he/she says *"Your Name"* (that is using a different card), then he/she will be automatically excluded from the game.

Exercise is accompanied by:

1. Two sheets containing twenty (20) cards each with the proper and improper telephone answers (ten (10) for group A and ten for group B).

Exercise solution:

Kindly find attached the right answers and how the telephone communication should look like.
Inappropriate statements are shown in red.

Other comments to the trainer:

All cards should be used during the exercise. At the end, the trainer explains the consequences of an appropriate telephone communication.

Attachments to the methodological tools:
Two sheets containing twenty (20) cards each with the proper and improper telephone answers (ten (10) for group A and ten (10) for group B).

[These attachments can be found in electronic format on the enclosed CD]

Methodological Tool ID:	**12**
Methodological tool code:	**EUPA_LO_009_M_012**
Title of tool:	**Creative Social Skills**
Learning Outcome Number and Title:	**LO009: Be able to understand the organisation's Codes of Conduct within the social, economic and cultural context**
Individual or group exercise:	Group
Type of methodological tool:	Creative group work

Objective of the methodological tool:

After the completion of this exercise the participants will be able to:

- Understand the importance of social skills and be able to apply them in an effective way.

Description of the exercise:

Learners work in groups. They are requested to demonstrate their understanding of social skills, as well as their importance when using a creative method. They are encouraged to use one of the following methods (or any other they can think of):

1. a song (which is videotaped)
2. a story in written form
3. a story accompanied by icons
4. a theatrical play

Exercise is accompanied by:

1. Depending on the type of work the groups will want to carry out, the following materials should be available (learners can also bring their own materials):

    1. magazines
    2. CD player
    3. tape recorder
    4. video camera
    5. coloured pencils/highlighters etc.

Exercise solution:

There is no correct and wrong answer in this exercise. After all groups present their work, the trainer could ask the groups to evaluate other groups on their demonstration of knowledge in social skills. Creativity is also important in this exercise, therefore groups should also vote for the most creative group.

Other comments to the trainer:

The trainer should have the role of the facilitator/supporter during the exercise. The trainer will motivate people to use creativity, but at the same time he/she will look into their notes to make sure that all aspects of social skills are covered.

Methodological Tool ID:	**13**
Methodological tool code:	**EUPA_LO_010_M_013**
Title of tool:	**Shield and protection**
Learning Outcome Number and Title:	**LO010: Be able to recall the key principles of data protection, security and confidentiality within the workplace and apply these principles effectively and efficiently**
Individual or group exercise:	Group
Type of methodological tool:	Group discussion

Objective of the methodological tool:

After the completion of this exercise the participants will be able to:

- Understand issues relating to the confidentiality and the privacy of their colleagues and employees

Description of the exercise:

This exercise has a part A and a part B.

Part A: Describe three types of Internal Customers and three different types of PR activities

Part B: Multiple choice scenarios regarding confidentiality issues.

1. You work as a PA in the Human Resources Department. Where would you place the file with the medical history of each employee?

    1. In the drawer
    2. On the bookcase
    3. On your desk
    4. Locked in the proper place

2. As a PA of the CEO you have the authority to open every item of mail for your boss. Your boss recently filed for a divorce but you did not know about this. One of the mails received included the divorce documents. What do you do?

    1. Ask one of your colleagues to advise you on the issue.
    2. Discuss it during your lunch break with the rest of the team.
    3. Act normally without discussing it any further and give the mail to your boss immediately.
    4. Ask your boss about this issue.

3. You work as a PA in a very prestigious company. A policeman comes and asks for your manager. Your manager is currently in a very important meeting. How would you react?

i You tell the policeman that your manager is not available and ask if he would like to leave a message.
ii You tell the policeman to wait until the meeting finishes and you offer him something to drink.
iii You inform your manager immediately.
iv You tell that your Manager is not available and you ask the policeman to leave.
v You tell the policeman that your manager is not available and if he would like to leave a message. At the same time you inform your manager immediately.

Exercise solution:

Part A:

Three Internal Customers i.e.:

- The receptionist
- The company cleaner
- The HR Manager

Three different PR Activities:i.e.

- Christmas event
- Birthday card and flowers
- Birthday party
- Small surprise
- Visit in the case of a newborn baby

Part B:

Multiple Choice 1: Right answer: iv

Multiple Choice 2: Right answer: iii

Multiple Choice 3: Right answer: v

Methodological Tool ID:	**14**
Methodological tool code:	**EUPA_LO_011_M_014**
Title of tool:	**Identify different types of stakeholders. Maintain good relationships with different types of stakeholders**
Learning Outcome Number and Title:	**LO011: Be able to recall the key principles of good relationships with customers and other external stakeholders, demonstrate competence in applying these principles in a clear and effective way. Be able to perform Public Relations activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions.**
Individual or group exercise:	Group
Type of methodological tool:	Simulation, Group discussion

Objective of the methodological tool:

After the completion of this case study participants will be able to:

- Identify the external customers.
- Describe different kind of PR activities for each one of the external customers.

Description of the exercise:

Participants form two groups and are given the following exercise:

PART A

1. You work as a PA for an organisation. Identify some external customers.
2. Now describe different PR Activities that you would use for each one of them.

PART B

1. Give each group three (3) different kind of letters, as well as a set of birthday wishes. They should answer the following questions:
   i Does the letter target an internal or an external stakeholder?
   ii Does the tone assist in maintaining positive relationships?

Exercise solution:

This exercise will help the participants understand the significance of the development and maintenance of good working relationships, both with the internal and the external customers.

PART A

1. You work as a PA for an organisation. Identify some external customers.

External Customers/stakeholders:

i.e.

- A customer that purchases products or services from your company
- An Outsourcing consultant Company
- The Government
- Suppliers are also external stakeholders.

2. Now describe different PR Activities you would use for each one of them.

For example:

- Events, e.g. a dinner for the associates
- Christmas cards
- Organise thematic events that will promote values or themes your stakeholders are interested in, e.g. corporate social responsibility

PART B

- **Letter 1**

A customer complaint letter. Note that the tone assists the maintenance of a good relationship even in the case of a complaint.

- **Letter 2**

It is probably a communication between different departments, where delay of one department caused a deadline to be missed. The tone assists in maintaining a good relationship.

- **Letter 3**

It can be applied in the case of both internal and external stakeholders. It is a Holiday card.

- **Letter 4**

It is probably an internal communication between different departments. The tone of the letter destroys any form of positive relationship.

- **Birthday wishes**

The ones in italics are informal and must not be used for external stakeholders. Also, they should only be used for internal customers with whom the relationship is very close.

Exercise is accompanied by:

1. Letter 1
2. Letter 2
3. Letter 3
4. Letter 4
5. Birthday wishes

Attachments to the methodological tools:

1. **Letter 1**

Dear Mr. Rodgers,

I am afraid that the enclosed video product does not work. This is the third one I am returning this month (see attached correspondence).

I bought it from ABC stores in Newtown, Big County on the 1st September 2011.

I was careful to correctly follow the user instructions.

Other than the two I had to return recently, I have always found your products to be excellent.

I would be grateful if you could send a replacement and refund my postage.

I really appreciate your help.

Yours faithfully,

Smith (Mrs.)

2. **Letter 2**

Dear Steve,

Firstly, I would like to apologise for the inconvenience caused by our weakness.

We take great care to ensure that important matters such as this are properly processed, although due to technical problems we missed the deadline.

I will contact you soon to make sure that the problem is fixed.

Please contact me should you have any further cause for concern.

Yours,

Ben Neilson

3. **Letter 3**

Steve

Thank you so much for being so unprofessional. Thanks to you and your dream team we managed to miss the deadline.

4. **Letter 4**

Happy Holidays! Regards, MMC Ltd

5. **Birthday wishes**

Happy Birthday! With Sincere Wishes that the coming year be full of Health, Happiness and everything good for you.

Happy Birthday... Lets go out for a beer

Hoping your Birthday is an event to remember!

***Dude**, just wanted to post some birthday wishes on your wall, **happy birthday** you are the best!"*

Happy Birthday... stay cool

Best Wishes on your Birthday and throughout the coming year.

Hope you have a Happy Birthday and may the coming year bring to you Good Health Happiness and Prosperity!

[These attachments can be found in electronic format on the enclosed CD]

Methodological Tool ID:	**15**
Methodological tool code:	**EUPA_LO_012_M_015**
Title of tool:	**Positive organisational behavior**
Learning Outcome Number and Title:	**LO012: Be able to recall the key principles of good working relationships within the organisation and demonstrate competence in applying these principles in a clear and effective way within the organisation. Be able to perform Public Relations activities to improve workplace relations, for example acknowledging birthdays, name days and other special occasions**
Individual or group exercise:	Group
Type of methodological tool:	Group discussion, Case Study

Objective of the methodological tool:

After the completion of this case study participants will be able to:

- Maintain good working relationships, even when under pressure
- Understand their conflict resolution style, using the Kilmann Questionnaire

Description of the exercise:

The exercise consists of two parts.

PART A

In the first part, participants are asked to form two (2) groups (or more – but there should not be more than 5 participants in each group).

Give each group five (5) A4 sheets.

Their goal is to build a paper bridge, in five (5) minutes, without using glue or any other type of office equipment, other than paper.

This exercise becomes more difficult if you give the participants one A2 paper and 2 A4 paper and ask them to build the bridge.

Then give them a toy car to pass over the bridge.

Give the participants a time frame of three (3) to five (5) minutes. The team that manages to carry out the task first is the winner.

Participants are requested to describe their emotions:

- at a personal level

- as members of the team in a potentially stressful situation

ALTERNATIVELY

You can run some experiential exercises, such as treasure hunting, in which good working relationships are important to be able to reach the goals. On the other hand, you also give each group a scenario where two members of the group have a conflict and will not cooperate. In fact, they will sacrifice the benefit of the group to cause problems to one another. Therefore, they will not communicate messages and will try to cause misunderstandings in the group. Through the experiential exercise, the participants should describe the results of this conflict to the success of the group.

PART B

During the second part, participants are asked to complete the Kilmann questionnaire.

Exercise is accompanied by:

1. The Kilmann Questionnaire, interpretation of results material for the trainer. http://www.terencemauri.com/wp-content/uploads/10.Thomas-Kilmann-Conflct-Questionnaire.pdf

Exercise solution:

The bridge exercise will demonstrate the need of good relationships for the success of a goal. The treasure hunting exercise will demonstrate how bad relationships affect the results.

As far as the Kilmann questionnaire is concerned, please consult the material for the trainer.

Attachments to the methodological tools:

1. THOMAS-KILMANN CONFLICT MODE QUESTIONNAIRE

Consider situations in which you find your wishes differing from those of another person.

How do you usually respond to such situations?

On the following pages are several pairs of statements describing possible behavioral responses. For each pair, please circle the "A" or "B" statement which is most characteristic of your own behavior.

In many cases, neither the "A" nor the "B" statement may be very typical of your behavior, but please select the response which you would be more likely to use.

1. **A.** Here are times when I let others take responsibility for solving the problem.

   B. Rather than negotiate the things on which we disagree, I try to stress those things upon which we both agree.

2. **A.** I try to find a compromise solution.

   B. I attempt to deal with all of another's and my concerns.

3. **A.** I am usually firm in pursuing my goals.

   B. I might try to soothe the other's feelings and preserve our relationship.

4. **A.** I try to find a compromise solution.

   B. I sometimes sacrifice my own wishes for the wishes of the other person.

5. **A.** I consistently seek the other's help in working out a solution.

   B. I try to do what is necessary to avoid useless tensions.

6. **A.** I try to avoid creating unpleasantness for myself.

   B. I try to win my position.

7. **A.** I try to postpone the issue until I have had some time to think about it.

   B. I give up some points in exchange for others.

8. **A.** I am usually firm in pursuing my goals.

   B. I attempt to get all concerns and issues immediately out in the open.

9. **A.** I feel that differences are not always worrying about.

   B. I make some effort to get my way.

10. **A.** I am firm in pursuing my goals.

    B. I try to find a compromise solution.

11. **A.** I attempt to get all concerns and issues immediately out in the open.

    B. I might try to soothe the other's feelings and preserve our relationship.

12. **A.** I sometimes avoid taking positions which would create controversy.

    B. I will let the other person have some of their positions if they let me have some of mine.

13. **A.** I propose middle ground.

    B. I press to get my points made.

14. **A.** I tell another my ideas and ask them for theirs.

    B. I try to show him the logic and benefits of my position.

15. **A.** I might try to soothe the other's feelings and preserve our relationship.

    B. I try to do what is necessary to avoid tension.

16. **A.** I try not to hurt the other's feelings.

    B. I try to convince the other person of the merits of my position.

17. **A.** I am usually firm in pursuing my goals.

    B. I try to do what is necessary to avoid useless tensions.

18. **A.** If it makes the other person happy, I might let them maintain their views.

    B. I will let the other person have some of their positions if they let me have some of mine.

19. **A.** I try to get all concerns and issues immediately out in the open.

    B. I try to postpone the issue until I have had some time to think it over.

20. **A.** I attempt to immediately work through our differences.

    B. I try to find a fair combination of gains and losses for both of us.

21. **A.** In approaching negotiations, I try to be considerate of the other person's feelings.

    B. I always lean toward a direct discussion of the problem.

22. **A.** I try to find a position that is intermediate between mine and another person's.

    B. I assert my wishes.

23. **A.** I am often concerned with satisfying all my wishes.

    B. There are times when I let others take responsibility for solving problems.

24. **A.** If the other's position seems important to them, I would try to meet their wishes.

    B. I try to get the other person to settle for a compromise.

25. **A.** I try to show the other person the logic and benefits of my position.

    B. In approaching negotiations, I try to be considerate of the other person's wishes.

26. **A.** I propose a middle ground.

    B. I am nearly always concerned with satisfying all my wishes.

27. **A.** I sometimes avoid taking positions that would create controversy.

    B. If it makes the other person happy, I might let them maintain their views.

28. **A.** I am usually firm in pursuing my goals.

    B. I feel that differences are not always worth worrying about.

29. **A.** I propose middle ground.

    B. I feel that differences are not always worth worrying about.

30. **A.** I try not to hurt the other person's feelings.

    B. I always share the problem with the other person so that we can work it out.

SCORING THE THOMAS-KILMANN CONFLICT MODE QUESTIONNAIRE

	Competing	Collaborating	Compromising	Avoiding	Accommodating
	(Forcing)	(Problem Solving)	(Sharing)	(Withdrawal)	(Smoothing)
1.				A	B
2.		B	A		
3.	A			B	
4.			A		B
5.		A		B	A
6.	B			A	
7.			B	A	
8.	A	B			
9.	B			A	
10.	A		B		
11.		A			B
12.			B	A	
13.	B		A		
14.	B	A			

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	Competing	Collaborating	Compromising	Avoiding	Accommodating
	(Forcing)	(Problem Solving)	(Sharing)	(Withdrawal)	(Smoothing)
15.				B	A
16.	B				A
17.	A			B	
18.			B		A
19.		A		B	
20.		A	B		
21.		B			A
22.	B		A		
23.		A		B	
24.			B		A
25.	A				B
26.		B	A		
27.				A	B
28.	A	B			
29.			A	B	
30.		B			A

	Competing	Collaborating	Compromising	Avoiding	Accommodating
	(Forcing)	(Problem Solving)	(Sharing)	(Withdrawal)	(Smoothing)
Total the number of letters circled in each column.					
	Competing	Collaborating	Compromising	Avoiding	Withdrawing
	(Forcing)	(Problem Solving)	(Sharing)	(Withdrawal)	(Smoothing)
	_____	_____	_____	_____	_____

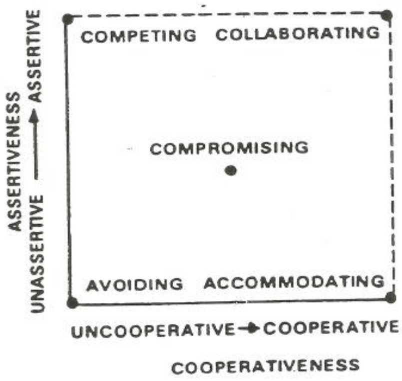
http://www.terencemauri.com/wp-content/uploads/10.Thomas-Kilmann-Conflct-Questionnaire.pdf

Material for Trainer

Interpretation and Theory

The Thomas Kilmann Conflict Mode Inventory, also known as the TKI, has been around since the 1970s. The authors, Ralph Kilmann and Kenneth Thomas, set up their inventory along the same lines as Robert Blake and Jane Mouton, who in a 1964 publication on "The Managerial Grid", described a model that conceptualizes management styles and relations. The Blake and Mouton mode uses two axes. "Concern for people" is plotted using the vertical axis and "Concern for task" along the horizontal axis. Each axis has a numerical scale of 1 to 9. These axes interact so as to diagram five different styles of management.

The Thomas Kilmann Conflict Mode instrument uses these identical axes, and identifies five different styles of conflict: Forcing, Avoiding, Accomodating, Collaborating, Compromising.



CONFLICT

Conflict is embedded in human relations. It arises when there is incompatibility of orientation between individuals or groups, and it can form in such situations as when people form incompatible goals and behaviours, when resources have to be allocated, and when decisions have to be made. Conflict is associated with:

Value: underlying values are different. This is arguably the most important and serious type of conflict because values are entrenched in social interaction and behaviour, and are very difficult to change.

Interests: what promotes one's self-interest opposes another's.

Policy: existing regulations do not reflect current needs.

Goals: there is controversy or disagreement about where a project is going.

Method: there is controversy or disagreement about how to arrive at the desired outcome.

Managed properly, conflict can result in growth because it allows for different points of view to be aired and considered. Managed badly, it can be destructive and costly – in resources and relationships. Groups can suffer from two opposite evils: too little conflict, and too much conflict. A little conflict can be a good thing for change and rejuvenation of outmoded structures and beliefs. A lot of conflict, however, can destroy a project and in serious cases even lead to costly lawsuits and official investigations.

Your profile of scores indicates the repertoire of conflict handling skills that you possess and use in conflict situations.

Interpreting Your Scores

One of the most often asked questions is "What are the right answers?" In this type of test, there are no "right" answers. All five modes of handling conflict are useful in various situations, and each represents a set of useful social skills. Listed below examples:

Collaboration: "Two heads are better than one." The goal is 'to find a win-win solution'
Accommodation: "Kill your enemies with kindness." The goal is 'to yield'.

Compromising: "Split the difference." The goal is 'to find a middle ground'

Avoiding: "Leave well enough alone." The goal is 'to delay'

Competing: "Might makes right." The goal is 'to win'

The effectiveness of any handling any conflict depends on the requirements of the conflict and the skill that is employed.

Each of us is capable of using all five conflict modes, and none of us can be characterized as having a single rigid style of dealing with conflict. However, because of personality traits or by habit, individuals tend to use one or two modes at a greater frequency than the others. Conflict resolution tools that a person employs can be selected based on the personal preference and the requirements of the situation.

The following information may help you judge how appropriately you use the five methods of conflict resolution.

Competing

Is assertive and uncooperative, a power-oriented mode. When competing, an individual pursues his or her own concerns at the other person's expense, using whatever power seems appropriate to win his or her position. Competing might mean standing up for your rights, defending a position you believe is correct, or simply trying to win.

Uses

• When quick, decisive action is vital—for example, in an emergency

• On important issues when unpopular courses of action need implementing—for example, cost cutting, enforcing unpopular rules, discipline

• On issues vital to company welfare when you know you're right

• When you need to protect yourself from people who take advantage of noncompetitive behavior

Signs of overuse

• *Are you surrounded by "yes" people?*

If so, perhaps it's because they have learned that it's unwise to disagree with you or have given up trying to influence you. This closes you off from information.

• *Are others afraid to admit ignorance and uncertainties to you?*

In a competitive climate, one must fight for influence and respect, acting more certain and confident than one feels. This means that people are less able to ask for information and opinions—they are less likely to learn.

In contrast, the fact that you scored high on competing makes it unlikely that you are underusing this mode.

Signs of underuse

• *Feeling powerless in situations.*

People who underuse competing may be unaware of the power they have, unskilled in its use, or uncomfortable with the idea of using it. This may hinder their effectiveness by restricting their influence.

• *Having trouble taking a firm stand, even when one sees the need.*

Concerns for others' feelings or anxieties about the use of power can cause vacillation, which may result in postponing the decision and adding to the suffering and/or resentment of others.

Collaborating

Is both assertive and cooperative. When collaborating, an individual attempts to work with the other person to find a solution that fully satisfies the concerns of both. It involves digging into an issue to identify the underlying concerns of the two individuals and to find an alternative that meets both sets of concerns. Collaborating between two persons might take the form of exploring a disagreement to learn from each other's insights, resolving some condition that would otherwise have them competing for resources, or confronting and trying to find a creative solution to an interpersonal problem.

Uses

• When you need to find an integrative solution and the concerns of both parties are too important to be compromised

• When your objective is to learn and you wish to test your assumptions and understand others' views

• When you want to merge insights from people with different perspectives on a problem

• When you want to gain commitment by incorporating others' concerns into a consensual decision

• When you need to work through hard feelings that have been interfering with a relationship

Signs of underuse

• *Is it difficult for you to see differences as opportunities for joint gain, learning, or problem solving?*

Although conflict situations often involve threatening or unproductive aspects, approaching all conflicts with pessimism can prevent you from seeing collaborative possibilities and thus deprive you of the mutual gains and satisfactions that accompany successful collaboration.

• *Are others uncommitted to your decisions or policies?*

Perhaps their concerns are not being incorporated into those decisions or policies. In contrast, the fact that you scored low on collaborating makes it unlikely that you are overusing this mode.

Signs of overuse

• *Spending time discussing issues in depth that don't seem to warrant it.*

Collaboration takes time and energy. Trivial problems don't require optimal solutions, and not all personal differences need to be hashed out. Overusing collaboration and consensus sometimes represents a desire to minimize risk—by diffusing responsibility or postponing action.

• *Failing to elicit collaborative responses from others.*

The exploratory nature of collaborative behavior may make it easy to disregard, and others may take advantage of the trust and openness shown. Overusers may miss signs of defensiveness, competitiveness, or conflicting interests.

Compromising

Is intermediate in both assertiveness and cooperativeness. When compromising, an individual has the objective of finding an expedient, mutually acceptable solution that partially satisfies both parties. Compromising falls on a middle ground between competing and accommodating, giving up more than competing but less than accommodating. Likewise, it addresses an issue more directly than avoiding but doesn't explore it in as much depth as collaborating. Compromising might mean splitting the difference, exchanging concessions, or seeking a quick middle-ground position.

Uses

• When goals are moderately important but not worth the effort or the potential disruption involved in using more assertive modes

• When two opponents with equal power are strongly committed to mutually exclusive goals—as in labor–management bargaining

• When you want to achieve a temporary settlement of a complex issue

• When you need to arrive at an expedient solution under time pressure

• As a backup mode when collaboration or competition fails

Signs of overuse

• *Do you concentrate so heavily on the practicalities and tactics of compromise that you sometimes lose sight of larger issues?*

Doing so may lead to unintended and costly compromises of principles, values, long-term objectives, or company welfare.

• *Does an emphasis on bargaining and trading create a cynical climate of gamesmanship?*

Such a climate may undermine interpersonal trust and deflect attention from the merits of the issues being discussed.

Signs of underuse

• *Do you sometimes find yourself too sensitive or embarrassed to engage in the give-and-take of bargaining?*

This reticence can keep you from getting a fair share in negotiations—for yourself, your team, or your organization.

• *Do you sometimes find it difficult to make concessions?*

Without this safety valve, you may have trouble gracefully getting out of mutually destructive arguments, power struggles, and so on.

Avoiding

Is unassertive and uncooperative. When avoiding, an individual does not immediately pursue his or her own concerns or those of the other person. He or she does not address the conflict. Avoiding might take the form of diplomatically sidestepping an issue, postponing an issue until a better time, or simply withdrawing from a threatening situation.

Uses

• When an issue is unimportant or when other, more important issues are pressing

• When you perceive no chance of satisfying your concerns—for example, when you have low power or you are frustrated by something that would be very difficult to change

• When the potential costs of confronting a conflict outweigh the benefits of its resolution

• When you need to let people cool down—to reduce tensions to a productive level and to regain perspective and composure

• When gathering more information outweighs the advantages of an immediate decision

• When others can resolve the issue more effectively

• When the issue seems tangential or symptomatic of another, more basic issue

Questions to Ask

Because you scored low on avoiding, there is a good chance that you are underusing this mode. To help you determine whether that is the case, consider the following questions:

Signs of underuse

• *Do you sometimes find yourself hurting people's feelings or stirring up hostilities?*

You may need to exercise more discretion and tact, framing issues in nonthreatening ways.

• *Do you sometimes feel harried or overwhelmed by a number of issues?*

You may need to devote more time to setting priorities—that is, deciding which issues are relatively unimportant and perhaps delegating them to others.

In contrast, the fact that you scored low on avoiding makes it unlikely that you are overusing this mode. However, you may be interested in these signs of overuse in others:

Signs of overuse

• *Causing coordination to suffer because people have trouble getting one's input on issues.*

• *Creating an atmosphere of "walking on eggshells."*

Sometimes a disproportionate amount of energy is devoted to caution and avoiding issues, indicating that those issues need to be faced and resolved.

• *Decisions on important issues getting made by default.*

Accommodating

Is unassertive and cooperative—the opposite of competing. When accommodating, an individual neglects his or her own concerns to satisfy the concerns of the other person; there is an element of self-sacrifice in this mode. Accommodating might take the form of selfless generosity or charity, obeying another person's order when you would prefer not to, or yielding to another's point of view.

Uses

• When you realize that you are wrong—to allow a better solution to be considered, to learn from others, and to show that you are reasonable

• When the issue is much more important to the other person than it is to you—to satisfy the needs of others and as a goodwill gesture to help maintain a cooperative relationship

• When you want to build up social credits for later issues that are important to you

• When you are outmatched and losing and more competition would only damage your cause

• When preserving harmony and avoiding disruption are especially important

• When you want to help your employees develop by allowing them to experiment and learn from their mistakes

Accommodating as a Style

Accommodators tend to see conflicts as social/emotional issues to be settled with support and sensitivity. They often believe in the Golden Rule ("Do unto others . . .") and believe that generosity will eventually be rewarded in kind. They regard coworkers as friends—people to be supported and looked after—and value support, generosity, goodwill, and team cohesiveness. They often see compassion and friendship as more important than the minor issues involved in most conflicts. Accommodators help coworkers meet their concerns—for the sake of the coworker and to help build cohesiveness and goodwill.

Contributions of an Accommodating Style

Accommodators' compassion and generosity can serve an important role in the interpersonal relations of their organization—as a kind of shock absorber when people are under stress. Accommodators help maintain goodwill and trust. They provide psychological support and a sympathetic ear and can serve as peacemakers to restore harmony. Their style helps soothe hurt feelings and resentments.

Signs of overuse

• *Do you feel that your ideas and concerns sometimes don't get the attention they deserve?*

Deferring too much to the concerns of others can deprive you of influence, respect, and recognition. It can also deprive the organization of your potential contributions.

• *Is discipline lax?*

Although discipline for its own sake may be of little value, some rules, procedures, and assignments are crucial and need to be enforced. Accommodating on these issues may harm you, others, or the organization.

In contrast, the fact that you scored high on accommodating makes it unlikely that you are underusing this mode. However, you may be interested in these signs of underuse in others:

Signs of underuse

• *Having trouble building goodwill.*

Accommodating on minor issues that are important to others is a gesture of goodwill.

- *Being viewed as unreasonable.*
- *Having trouble admitting when one is wrong.*
- *Failing to recognize legitimate exceptions to the rules.*
- *Refusing to give up.*

[These attachments can be found in electronic format on the enclosed CD]

Methodological Tool ID: **16**
Methodological tool code: **EUPA_LO_013_M_016**
Title of tool: **Creative demonstration of your writing skills**
Learning Outcome Number and Title: **LO013: Be able to recall the main principles of effective forms of written communication and demonstrate competence in applying these principles in a clear and effective way**
Individual or group exercise: Group
Type of methodological tool: Competition

Objective of the methodological tool:

After the completion of this exercise the participants will be able to:

- Recall the main principles of effective forms of written communication
- Understand their use

Description of the exercise:

The participants should split into two or more groups.

The objective of each group is to prepare a presentation accompanied by a poster for the principles of written communication.

The presentation should last about five minutes. After the presentation, participants must answer questions for about three minutes. A committee will judge the groups on the following factors (on a scale of 1-5)

- in depth understanding of principles of written communication
- quality of the poster
- body language during the presentation
- response to questions

Other comments to the trainer:

You should encourage the participants to adopt a holistic approach to the issue of business writing but to compose their presentation and their poster in a creative way. They should focus on the following main principles.

- Easy to read.
- Visually appealing.
- Knowledge of subject.

- Respect to the reader.
- Use techniques for handling large sets of data easily.
- Appropriate tone.
- Who is the receiver? How formal/informal the document should be.
- Use of appropriate words that can make the difference.

Methodological Tool ID:	**17**
Methodological tool code:	**EUPA_LO_014_M_017**
Title of tool:	**Making an order**
Learning Outcome Number and Title:	**LO014: Be able to produce a variety of routine business documents (based on predefined templates)**
Individual or group exercise:	Individual
Type of methodological tool:	Simulation

Objective of the methodological tool:

After the completion of this exercise the participants will be in a position to:

- Make an order (based on predefined templates).

Description of the exercise:

The participants will receive an email from their boss. Their task is to make the appropriate order based on predefined templates.

Exercise is accompanied by:

For the participants:

1. An email from your boss asking you to make an order on behalf of him/her.
2. An order template.

For the trainer:

1. A sample order letter.
2. Do's and Don'ts tips when you are writing an order letter.

Exercise solution:

The participants will be able to conduct an order letter effectively.

Other comments to the trainer:

Check the do's and don'ts tips when you are writing an order letter and guide the participants appropriately.

Attachments to the methodological tools:

<u>For the participants</u>

1. An email from your boss asking you to make an order on behalf of him/her

Dear Maria

I need to have the following items by Friday. Please treat this as urgent.

A new HP black and white printer (budget 70,00 €),

1 keyboard (budget 50,00 €),

1 black leather briefcase (budget 52,00€).

Ms. Sheila at "Runway office supplies" will assist you.

2. An order template

Fax/Email Transmission

To:			
Company/Organization:			
From:	**[YOURNAME], [Your Organisation]**		
Fax :	Of the receiver	**Pages:**	Number of pages
Telephone:	Of the receiver	**Date:**	/ /2012 , Time:

Dear **[Title & Surname]**,

Purchase Order [date]

Thank you for your cooperation. Kindly find below our purchase order.

Date:	
Supplier Name:	
Specifications:	
Requested Delivery Date/Time:	
Delivery Address:	
Net Amount:	
VAT:	
Total Amount:	
Comments:	

OTHER DETAILS

- To confirm the acceptance of this purchase order please sign this document and return it to us by fax on *234567*.
- Written confirmation is required
- Please invoice **Management Org. 25, Neapolis Ave. Rome, Italy**

Kind Regards,

[Signature]

[Name Surname]

[Title]

[email]

FOR THE SUPPLIER

☐ **We hereby confirm the acceptance of this purchase order**

Date:

Signature:

Name:

For the trainer

1. **A sample order letter**

Fax/Email Transmission

To:	**Ms Sheila**		
Company/Organization:	**Runway Office Supplies**		
From:	**Maria and the Surname, Management Company**		
Fax :	222222	**Pages**:	2
Telephone:	222221	**Date:**	/ / 201 , Time:

Dear **Mrs. Ranos**,

Purchase Order [17/05/2011]

Thank you for your cooperation. Kindly find below our purchase order.

Date:	17/05/2011
Supplier Name:	**Runway Office Supplies**
Specifications:	A HRP Black and white printer (70,00 €), 1 keyboard (50,00 €), 1 black briefcase for women (52,00€)
Requested Delivery Date/Time:	Friday, xx/xx/xxxx, any time
Delivery Address:	25, Neapolis Ave. Rome, Italy
Net Amount:	172 €.
VAT:	None.
Total Amount:	172 €.
Comments:	

OTHER DETAILS

- To confirm the acceptance of this purchase order please sign this document and return it to us by fax on *234567*.
- Written confirmation is required
- Please invoice **Management Org. 25, Neapolis Ave. Rome, Italy**

Kind Regards,

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[Signature]

Name and Surname

PA

An email, i.e. maria@management.com

FOR THE SUPPLIER

☐ **We hereby confirm the acceptance of this purchase order**

Date:

Signature:

Name:

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2. Some do's and don'ts while writing an order or purchase order letter

An order letter, also known as a purchase order or PO, begins the paper trail of a specific purchase. The objective is to provide the vendor with detailed instructions for fulfilling an order. It also serves as a legal record of the transaction and, consequently, should be written with care.

- This type of letter should be written as soon as the decision on a particular product has been made.
- You should give enough time after the order is placed to the vendor to execute the order.
- The letter should indicate the product code or an item number and also the quantities being ordered.
- Mention clearly the date when the order letter is generated as this is will identify the time when the order is being placed.
- Also indicate when you would like to receive the order.
- If necessary mention how the order should be delivered (there may be extra charges).
- You may need to clarify the payment method you will follow for this specific order.
- It is important that you and the supplier agree on the amount to be paid for this specific order. That is why the cost per item as well as the total of the cost to be paid, including any taxes, should be clearly indicated on the purchase order.
- Make sure that you do not make any grammatical and punctuation mistakes in the letter. The purchase order is a document that promotes the image of your company.

[These attachments can be found in electronic format on the enclosed CD]

Methodological Tool ID:	**18**
Methodological tool code:	**EUPA_LO_015_M_018**
Title of tool:	**Writing appropriately**
Learning Outcome Number and Title:	**LO015: Be able to communicate in writing at a level that is appropriate for business (use business terms, avoid jargon, etc.)**
Individual or group exercise:	Group
Type of methodological tool:	Group discussion

Objective of the methodological tool:

After the completion of this exercise the participants will be able to:

- Communicate in writing at a level that is appropriate for business.

Description of the exercise:

Participants are given a text document. They should discuss on issues such as the following:

1. grammar or spelling mistakes
2. the structure
3. the tone
4. formal/informal
5. clarity of key points
6. clarity of the presentation

Exercise is accompanied by:

1. An 'inappropriate' letter of interest.
2. An 'appropriate' letter of interest.

Exercise solution:

Participants should:

- Format the text
- Check the spelling
- Check the tone
- Check the grammar, etc.

Other comments to the trainer:

The trainer may use the enclosed document or any other document. The document should contain different types of mistakes including formatting mistakes.

Inform the participants that the text below should be formatted into a professional form (i.e. bullets, paragraphs, grammar check, etc.).

Attachments to the methodological tools:

1. **An 'inappropriate' letter of interest**

Hello Mr./ Mrs.,

How are u?

I saw Company X's retail management training program at *College Graduate Magazine* and I wanna know the possibility of openings. I like having in a career in retail management and I wanna relocate to New York City. I d love to learn about the college and the available training programmes oportunity. Regarding my academics I have: 1. a Bachelor of Science degree in Management and Business, 2. Master in Marketing, 3. Certification in Project Management. Furthermore, and I have retail experience as a Sales Associate and Key Holder. And, I did complete two internships on retail management.

My resome, has additional information on my experience and skills. I would appreciate the opportunity to discuss the training program with you and to provide further information on my candidacy. I can be reached anytime, 555-555-5555.

Regards.

Robert

2. <u>An 'appropriate' letter of interest</u>

Dear Ms. Willow,

I am referring to the retail management training programs that have been presented in the C*ollege Graduate Magazine,* and I would like to inquire about the possibility of enrolment.

I am interested in a career in retail management and I am planning to relocate to New York City in the near future. I would be interested in learning more about the college and the available training program opportunities.

Regarding my academics, I am a holder of:

1. A Bachelor of Science degree in Management and Business,
2. A Masters of Science in Marketing and
3. Certification in Project Management

Moreover, I had some retail experience as a Sales Associate and Key Holder. I have also completed two internships focusing on retail management.

My resume, which is enclosed, contains additional information on my experience and skills.

I would appreciate the opportunity to discuss the training program with you and to provide further information on my candidacy. I can be reached anytime via my cell phone, 555-555-5555.

Thank you for your time and consideration. I look forward to speaking with you about this exciting opportunity.

Yours sincerely,

Robert Wilson

[These attachments can be found in electronic format on the enclosed CD]

Methodological Tool ID: **19**

Methodological tool code: **EUPA_LO_016_M _019**

Title of tool: **Practice Filing Systems**

Learning Outcome Number and Title: **LO016: Be able to maintain established manual and electronic filing systems**

Individual or group exercise: Individual

Type of methodological tool: Written exercise

Objective of the methodological tool:

After the completion of this exercise the participants will be in a position to:

- Understand the importance of filing system
- Be able to design a simple filing system

Description of the exercise:

The learners receive the following information:

1. A filing structure of a company.
2. File Name Policy of the company.
3. Two documents, one from a supplier and the other from a customer.
4. An excel sheet called 'the control of documents'.

The learners are requested to write the codes of the files as well as to indicate the code of the file where the documents are to be stored.

Exercise is accompanied by:

1. Filing structure
2. File name policy
3. Two documents
4. Customer document
5. Supplier document
6. Control of documents (in excel format)

Exercise solution:

The code for the customers file is:

CUS_UK_HOUSE_CR and the document code is 2011_07_22_(serial no)

The code for the suppliers file is :

SUP_UK_COSMET_CR and the document code is 2011_07_23_(serial no)

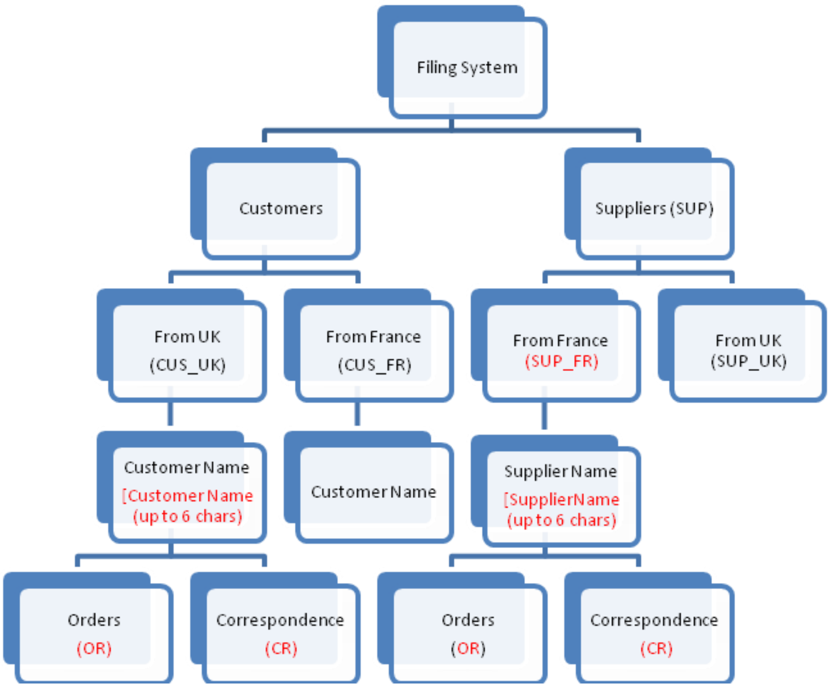
Other comments to the trainer:

With these exercises the learners should be able to identify the code of the file where the documents should be placed. In other words they should perform the following procedure: Give a code to the document, enter it into the control of documents and identify the file in which it will be stored.

Attachments to the methodological tools:

1. Filing Structure

BEAUTY PRODUCTS LTD is a company that imports and distributes cosmetics. Their filing system is presented by the following diagram:



2. File Name Policy of the company

The files of the company are given a code, which is in fact the concatenation of the different codes of the levels. E.g. *LOREAL's codes are*: SUP_FR_LOREAL_OR

When a document is produced or delivered to the company, the document has a **serial number that consists of the date** (8 digits as 2011-03-02) **and a three digit serial number.** Therefore, a code would be 2011-03-02-211. This code is entered in the control of documents and is also typed with red ink on the top right of the document.

3. Two documents

a. Customer document

The HOUSE OF COSMETICS

Manchester UK

To**: BEAUTY PRODUCTS LTD**

Nasia Tsantilli

Martiou 68,

Thessaloniki, 54248,

Greece

TEL: 3333569

Date: 22/7/11

Dear Ms Tsantilli,

Delivery of expired stock

I am referring to our order 50333, which has been delivered on the 15th of July 2011. I am very sorry to inform you that the stock received contained items which have already expired or will expire some time in the following month. As a result, we regret to say that we are unable to accept the delivery. The stock has been sent back to you today through ACS.

We expect our account to be credited with the amount of the order plus the cost of returning the stock, as soon as possible.

I look forward to your reply.

Best regards,

Debbie Johnson

Purchase Manager

The house of cosmetics

b. <u>Supplier Document</u>

COSMETICS FROM EARTH

Cosmetics manufacturer

London UK

To: BEAUTY PRODUCTS LTD

Martiou 68,

Thessaloniki, 54248,

Greece

Tel: 3333569

Date: 23/07/2011

Dear Ms Tsantilli,

Thank you for your order. At this time we cannot fill your order due to an unexpected shipment delay from our overseas suppliers.

We will hold your order for arrival of the merchandise, and ship shortly thereafter. Unfortunately, we cannot provide you with a specific shipping date at this time.

Thank you for your anticipated patience in this matter.

Best Regards,

Polizos Stefan

Customer Relations Manager

Cosmetics from Earth

4. Control of documents (blank and completed)

A/A	NAME OF THE COMPANY	DATE OF RECEIPT	MONTH OF RECEIPT	YEAR OF RECEIPT	TYPE OF DOCUMENT	INCOMING-OUTGOING	Distributed to	FILE NAME	CODE

A/A	NAME OF THE COMPANY	DATE OF RECEIPT	MONTH OF RECEIPT	YEAR OF RECEIPT	TYPE OF DOCUMENT	INCOMING-OUTGOING	Distributed to	FILE NAME	CODE
1	COSMETICS FROM EARTH	28	July	2011	LETTER	INCOMING	Nasia Tsantilli	2011_07_23_001	SUP-UK-COSMET_CR
2	**BEAUTY PRODUCTS LTD**	28	July	2011	LETTER	INCOMING	Nasia Tsantilli	2011_07_22_002	CUS_UK_HOUSE_CR

[These attachments can be found in electronic format on the enclosed CD]

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Methodological Tool ID: **20**
Methodological tool code: **EUPA_LO_017_M _020**
Title of tool: **Identify mistakes in business documents**
Learning Outcome Number and Title: **LO017: Be able to prepare, interpret and check entries of business documents**
Individual or group exercise: Group
Type of methodological tool: Written exercise

Objective of the methodological tool:

After the completion of this exercise the participants will be in a position to:

- Prepare, interpret and check entries of business documents
- Be able to design and identify troubleshooting documents

Description of the exercise:

The participants will receive three receipts and one email. They have to identify possible mistakes in these documents.

Exercise is accompanied by:

1. Receipt 1
2. Receipt 2
3. Receipt 3
4. Email

Exercise solution:

1. **Receipt (1), No1757:**

Some errors have been found in the above receipt which makes it invalid as a document.

- 1st error: There is no official stamp from MMC, which must be placed near the signature.
- 2nd error: Inconsistency between the payment method field and the cheque number field: The payment method field indicates cash but a cheque number is indicated in the cheque number field.

2. **Receipt (2), No 7268:**

Some errors have been found in the above receipt.

- 1st error: The amount indicated in the alphabetic field (two hundred and fifty nine) is different from the one mentioned in the numeric field (184.00 Euros).
- 2nd error: The date (25/08/2013) is not valid (as it is a future date).

3. Receipt (3) is correct

General Notes and Comments:

A valid receipt should mention:

1. The name of the person or the organisation which has made the payment (and to whom we issue the receipt),
2. The official stamp of the company that is involved in the transaction,
3. The number of receipt,
4. Date of issue of the receipt,
5. Time of issue of the receipt,
6. The amount paid in words,
7. The amount paid in numbers,
8. The payment method (cash, cheque, visa, etc.),
9. Bank Name (in case of cheque) and the cheque number,
10. Signature of the person who has issued the receipt.

4. Email:

Subject: Job inquiry

The email mentions an attached CV but no attachment has been received. The receiver of this email should not forward the email. Instead, a reply email should be sent indicating that the attachment is missing. After receiving the email with the attachment, the receiver should forward it to the appropriate person.

Other comments to the trainer:

The documents included in this methodological tool are just indicative. The trainer should provide other documents as well, or develop his/her own documents. Objective is for the learners to develop attention to detail so that they will be able to spot mistakes.

Attachments to the methodological tools:

1. Receipt 1

MMC Mediterranean Management Centre

VAT. REG. NO:10127492 TAX ID: 12127492 CO. REG. NO:127492

RECEIPT

Received From: **CUSTOMER NAME** Receipt No: **1757**

For the Training of:

The Sum of: **Six hundred eighty nine Euros only**

689

For settlement of invoice 6852

Payment method: cash

Bank: BANK NAME Cheque No: 9652354

RECEIPT

For MMC LTD

....

Date

....

MMC LTD, 16 Imvrou Str., Nicosia 1055, Cyprus Tel: 22466633/36 Fax: 22466635 Email: mmc@editc.com

2. Receipt 2

EDIT·C
EDUCATION & INFORMATION TECHNOLOGY CENTRE

Receipt

No 7268

Received From:	**CUSTOMER NAME**		
The Sum of:	Two hundred fifty nine		**Euros and**
zero	**cents**	**Amount:**	€184.00
For Settlement of Invoices:		08960	
Cash/Cheque No:		CHEQUE NUMBER / BANK NAME	

25/08/2013 **John Smith**

....

Date **The Recipient** **Signature and Stamp**

Company Details:

EdITC Ltd.

Tax ID: No. 12076110Y

Company Registration Number: 76110

16 Imvrou Str., Nicosia 1055, Cyprus Tel: 22466633/36 Fax: 22466635

Email: editc@editc.com

Visit us at www.editc.com

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3. Receipt 3

EDIT·C
EDUCATION & INFORMATION TECHNOLOGY CENTRE

Receipt

No 7268

Received From:	**CUSTOMER NAME**		
The Sum of:	One hundred eighty four		**Euros and**
zero	**cents**	**Amount:**	€184.00
For Settlement of Invoices:		08960	
Cash/Cheque No:		CHEQUE NUMBER / BANK NAME	

25/08/2011 **John Smith**

....

Date **The Recipient** **Signature and Stamp**

Company Details:

EdITC Ltd,

Tax ID: No. 12076110Y

Company Registration Number: 76110

16 Imvrou Str., Nicosia 1055, Cyprus Tel: 22466633/36 Fax: 22466635

Email: editc@editc.com

Visit us at www.editc.com

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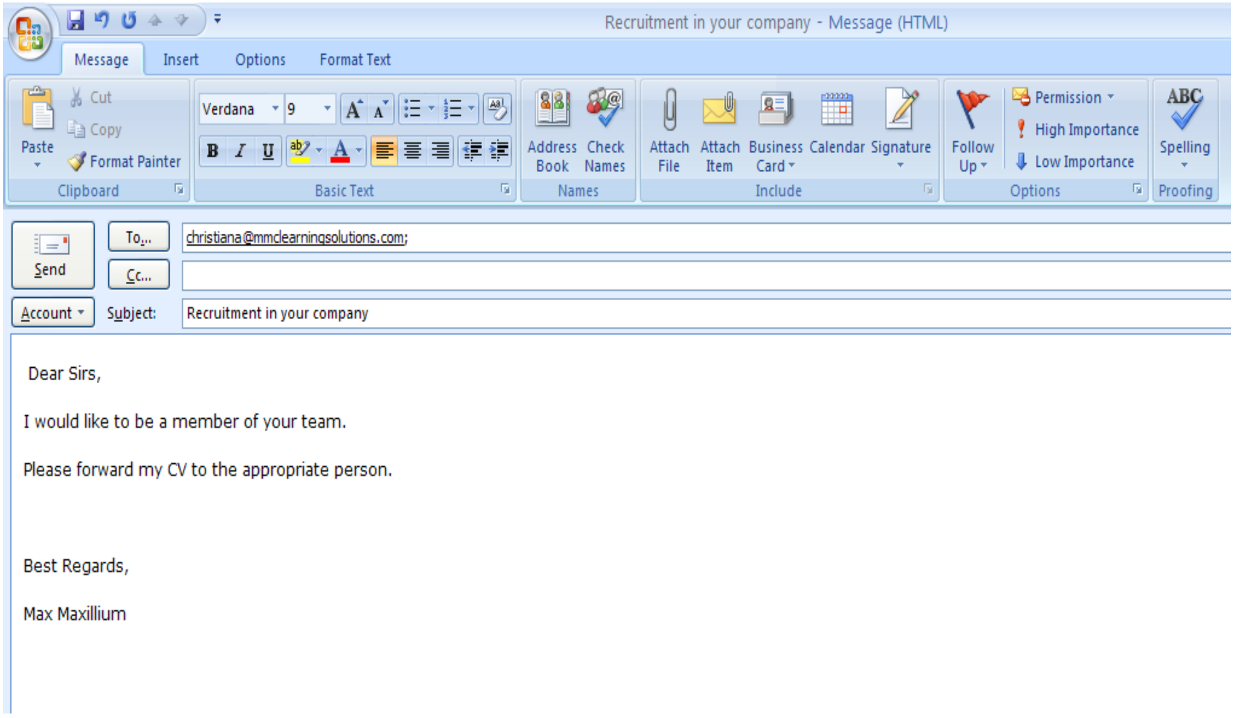
4. Email



[These attachments can be found in electronic format on the enclosed CD]

Methodological Tool ID:	**21**
Methodological tool code:	**EUPA_LO_018_M _021**
Title of tool:	**Create a simple travel agents database**
Learning Outcome Number and Title:	**LO018: Be able to enter accurate and relevant data in an existing database system (electronic or manual)**
Individual or group exercise:	Individual
Type of methodological tool:	Written exercise

Objective of the methodological tool:

The objective of this exercise is for the learners to:

- design the structure of a very simple database (that is to identify the type of information they should store for each travel agent)
- design the database in an electronic format (using any type of software they prefer) or non electronic format
- enter data in the database

Description of the exercise:

Learners are requested to design and create a simple travel agent's database. Database could be electronic or non electronic.

Learners will have access to laptops or PCs with connection to internet. Alternatively, the learners may be given telephone (or other) directories where they can find the relevant information for travel agents.

Exercise is accompanied by:

1. Telephone or other directories (containing information on travel agents)
2. Laptops or PCs with connection to the internet

Exercise solution:

A possible structure will contain the following:

- Name of travel agent
- Address
- City
- Postal Code
- Email
- Size
- General Manager
- Receptionist
- Contact person
- Contact person email

(more complex structure may also be suggested)

Other comments to the trainer:

Attention should be paid on the way the learners design the database as well as their attention to detail (e.g. phone numbers entered correctly, addresses entered correctly etc).

Methodological Tool ID: **22**

Methodological tool code: **EUPA_LO_019_M _022**

Title of tool: **Receipts**

Learning Outcome Number and Title: **LO019: Be able to use Business Transaction and Payment procedures**

Individual or group exercise: Group

Type of methodological tool: Written exercise

Objective of the methodological tool:

After the completion of this exercise the participants will be in a position to:

- Understand and follow Basic Business Transactions
- Understand Payment procedures

Description of the exercise:

1. The participants are given an invoice for which they have to identify whether there are any missing parts.
2. Participants are given two receipts and they have to identify the correct one which contains no missing parts.

Exercise is accompanied by:

1. Invoice
2. Receipt (1)
3. Receipt (2)

Exercise solution:

Invoice 1

Some errors have been found in the above invoice which makes it invalid as a transactional document.

- Invoice number is missing
- City is missing (in the address of MMC)

Receipt 1

A minor mistake is the fact that the contact details of the company which gave the donation are not presented.

Receipt 2

Although the amount was paid in cash, a cheque number and the bank name appear on the receipt.

Other comments to the trainer:

The above exercises will help the trainer realise the extent to which the participants are familiar with different kinds of payment documents.

Attachments to the methodological tools:

1. <u>Invoice</u>

MMC Management Center Ltd

INVOICE

16 Imvrou street

INVOICE No

DATE: 6 July, 2012

Billing Address:

TTT University

123 SuperAvenue

Nicosia Cyprus

22466633

Comments or special instructions:

QUANTITY	DESCRIPTION	UNIT PRICE	AMOUNT
20	Body Language Books	17.87	357.40
		SUBTOTAL	357.40
		SALES TAX	0%
		P&P	
		TOTAL DUE	357.40

Make all cheques payable to **MMC Management Center Ltd**

If you have any questions concerning this invoice, contact Mary Thomson at 22466633

THANK YOU FOR YOUR BUSINESS!

2. Receipt (1)

Donation Receipt from My Company Ltd	
Donated by	My Company Ltd
State/ Province	England
Type of donation	Scholarship
Description	For Mrs. Yevgenia Davidson
Value	22000 euros
Thank you for your generosity. We appreciate your support!	

3. Receipt (2)

Receipt					Date: 11/29/2011 Receipt # 100
My Company 17, Random Str. Rome, Italy, 11111 4567893 Fax 2356357 mycompany@com		Sold To			Mrs. Robert Klablought Company 14, Seldom Str. Rome, Italy, 22222 4214567 Customer ID [ABC12345]
Payment Method		*Cheque No.*			*Name of Bank*
Cash		1237687			England Bank
Qty	*Item #*	*Description*	*Price*	*Discount*	
1	Laptop	HP	460,00	-182,00	379
Total Discount				182,00	
Thank you for your business! ***Total***					278

[These attachments can be found in electronic format on the enclosed CD]

Methodological Tool ID:	**23**
Methodological tool code:	**EUPA_LO_020_M _023**
Title of tool:	**Payments through the development of posters**
Learning Outcome Number and Title:	**LO020: Be able to make payments to suppliers and receive payments from customers in conformity with organisational procedures**
Individual or group exercise:	Group
Type of methodological tool:	Creative Group Work

Objective of the methodological tool:

After the completion of this exercise the participants will be in a position to:

- Make payments to suppliers
- Receive payments from customers

Description of the exercise:

The participants form two groups and they are given the task to create a poster through which they will demonstrate their understanding in making payments to suppliers or receiving payments from customers.

Participants are encouraged to demonstrate the procedure of payment and also to demonstrate their understanding of the importance of paying attention to detail.

Exercise solution:

There is no right or wrong answer. However, through their posters, the participants should demonstrate their understanding of the different stages involved in the payment procedure, as well as important details they should take into account.

Methodological Tool ID:	**24**
Methodological tool code:	**EUPA_LO_021_M _024**
Title of tool:	**Organise my trip to London**
Learning Outcome Number and Title:	**LO021: Be able to recommend business travel and accommodation arrangements in accordance with a deadline and in line with budget requirements and organisational procedures**
Individual or group exercise:	Individual, Group
Type of methodological tool:	Simulation

Objective of the methodological tool:

After the completion of this simulation the participants will be in a position to:

- make recommendations and arrangements for business travels

Description of the exercise:

Participants are provided with the following scenario and are being requested to identify flights and hotel that meet the criteria. To achieve this objective the participants have access to a telephone and to an internet connection.

SCENARIO:

Your manager needs to attend a meeting on the 13th and the 14th of September. The meeting will take place in London (Hammersmith). The meeting will commence on the 13th of September at 09:00 o'clock and will be completed on the 14th of September at 17:00 o'clock. However, your manager wants to spend the 15th of September in London and return on the 16th.

The hotel should have internet connection in the room. A single room is needed. The reservation should be on a bed and breakfast basis.

The budget for this business trip is 950 Euros.

Exercise solution:

The participants must be in a position to search alternatives in terms of travelling and accommodation. The best alternative should be suggested. The learners should take into account the area of the meeting and suggest a convenient hotel, probably through the use of Google maps.

Methodological Tool ID: **25**

Methodological tool code: **EUPA_LO_022_M _025**

Title of tool: **Prepare the itinerary**

Learning Outcome Number and Title: **LO022: Be able to produce and collate travel documentation within an appropriate timescale in order to meet traveller's needs and legal requirements (e.g. visa procedures)**

Individual or group exercise: Individual, Group

Type of methodological tool: Simulation

Objective of the methodological tool:

After the completion of this simulation the participants will be in a position to:

- produce and collate travel documentation within an appropriate timescale

Description of the exercise:

This exercise is a continuation of the exercise in the previous methodological tool.

The following information is added to the scenario mentioned in the methodological tool with number 24.

1. During his trip to London, the manager has to also arrange to meet an advertising agency that will probably handle the marketing campaign of the company. Moreover, he wants to meet with an old university friend.
2. The secretary has already booked the two meetings. On the 13th of September he will meet with his university friend for dinner and drinks. On the 14th of September, at 18:30 o'clock, he will have a meeting with the marketing agency at the hotel, and then the manager is invited by the marketing agency for dinner (place to be confirmed).

The participants are requested to develop the itinerary for the journey.

The following is a draft, since the exact itinerary will depend on the flights selected.

12/09/2012

xx:xx Departure from residence to Lanraca airport

xx:xx Departure from Lanraca airport to London (…………… airport).

xx:xx Arrival to London

You can take a taxi to take you to the hotel (hotel details shown on the travel contact list)

13/09/2012

09:00 Meeting

The meeting venue details are presented on the travel contact list. It will take approximately 30 minutes by taxi to get to the meeting venue

17:00 Meeting is completed

The host will arrange a taxi to take you to the hotel

20:00 Your friend will pick you up from the hotel

Friend's mobile number is 0044-61-393938

14/09/2012

09:00 Meeting

17:00 Meeting is completed

The host will arrange a taxi to take you to the hotel

18:30 Meeting with Mr Ryde and Ms Smith from the marketing agency. Their phone numbers are listed on the travel contact list.

15/09/2012 - Free day

Here is a list of suggestions

- …………………………
- …………………………
- …………………………

16/09/2012 - Departure day

xx:xx Departure from the hotel

xx:xx Departure from London (…………… airport) to Lanraca airport.

Other comments to the trainer:

The trainers should take into account both the traditional ways of organising a business trip and the modern ways (web check in, offers via net, etc.)

Methodological Tool ID:	**26**
Methodological tool code:	**EUPA_LO_023_M _026**
Title of tool:	**Eliminate the risks involved in travelling**
Learning Outcome Number and Title:	**LO023: Be able to state the importance of checking travel plans immediately prior to the journey and carry out the process in a clear and effective way**
Individual or group exercise:	Group
Type of methodological tool:	Simulation, Group discussion

Objective of the methodological tool:

After the completion of this exercise the participants will be in a position to realize and state the importance of checking travel plans immediately prior to the journey.

Description of the exercise:

Participants are asked to identify scenarios where last minute checking would save the traveller from a lot of trouble, and to describe their actions in each of the situations.

Exercise solution:

There is no right or wrong answer. Participants are expected to mention scenarios similar to the following (and maybe some others):

1. Delay in the departure of the flight. Knowing this, saves the traveller from spending too much time at the airport.
2. Checking the weather beforehand enables the traveller to be in a position to face bad weather.
3. Confirming with the hotel just before the arrival saves the traveller from facing a situation where no booking was made due to miscommunication.
4. Checking for any scheduled strikes also enables the traveller to have a contingency plan, in case the strikes affect his scheduled meeting.

Methodological Tool ID:	**27**
Methodological tool code:	**EUPA_LO_024_M _027**
Title of tool:	**Develop your own simple checklist**
Learning Outcome Number and Title:	**LO024: Be able to prepare for a routine meeting by drawing up a simple checklist, liaising with the Chair of the meeting, and produce the relevant documents required**
Individual or group exercise:	Group
Type of methodological tool:	Simulation

Objective of the methodological tool:

Through this exercise the participants will learn to develop their own checklist in order to follow the activities needed for the preparation of a meeting.

Description of the exercise:

Participants are given a memo, which has been received by Mary from her manager. The memo suggests that a meeting with important partners from abroad will take place, and that Mary has to arrange all details.

Participants are requested to produce their own checklists containing the activities needed for the preparation of a meeting.

Exercise is accompanied by:

1. A memo to Mary from her manager
2. Sample checklists *(to be provided as the solution to the exercise)*

Exercise solution:

The participants should demonstrate ability to analyse what is requested for the meeting and focus on the details.

Sample meeting checklists are attached. However, it should be explained to the participants that these are indicative.

Other comments to the trainer:

The participants have to work in groups in order to develop checklists for the meeting.

Attachments to the methodological tools:

1. A memo to Mary from her manager

Dear Mary,

I have just been informed that the European committee responsible for our organisation in Brussels will be visiting us for a progress meeting on the 2nd of December. This meeting is vital for us. Please make sure that everything will be in order, taking into account the following:

1. *Three people will visit us. All of them will arrange their own travelling but we need to make their accommodation arrangements.*
2. *The meeting duration will be 2 days.*
3. *The head of our EU projects department I and will be making a presentation.*
4. *We will be taking lunch at the office during the meetings but we have to arrange for two formal dinners also.*
5. *Please also arrange for reminder gifts.*

I am sure you will figure out the rest of the details yourself.

Let me know if you have any questions.

Mark

2. Sample checklists

MEETING TYPE

☐ **EU Projects Meeting**		**Project Name**	
Project Coordinator		**Contact Name, telephone and Email**	
☐ **Customer Meeting**		**Customer Name**	
Contact Name, telephone and Email		**Contact Name, telephone and Email**	
☐ **Customer Meeting**		**Association Name**	
Official Representative of the organisation		**Person Responsible for the meeting**	

PARTICIPANT DETAILS

Number of participants		**Participants from**	☐ **Cyprus** ☐ **Abroad**
Responsible for accommodation arrangements?	☐ **Yes** ☐ **No**	**Participants Booking form attached**	☐ **Yes** ☐ **No**
Other comments related to participants			

MEETING DETAILS

<table>
<tr><td>Meeting Title:</td><td colspan="4"></td></tr>
<tr><td>Start Date:</td><td></td><td>End Date:</td><td colspan="2"></td></tr>
<tr><td>Start Time:</td><td></td><td>End Time:</td><td colspan="2"></td></tr>
<tr><td>Duration:</td><td colspan="2">Xxx days/ xxx hours</td><td>Language:</td><td>☐ Greek
☐ English</td></tr>
<tr><td>Venue (include room name if applicable):</td><td colspan="4"></td></tr>
<tr><td>Venue room layout</td><td colspan="4">☐ Classroom
☐ U shape (Π)
☐ In Groups (enter no of groups)
☐ No tables in the room
☐ Other (please specify):
____
______________________________</td></tr>
<tr><td>Person responsible at venue</td><td colspan="4"></td></tr>
<tr><td>Other comments related to the venue</td><td colspan="4"></td></tr>
</table>

COFFEE AND LUNCH BREAKS

Day #(1,2 etc) and time of break	Type of break	Please include

OUR RESPONSIBILITIES

☐ Booking of accommodation for participants

☐ Arranging taxis for participants

☐ Composition of agenda

☐ Dissemination of agenda

☐ Preparation of folders

☐ Other1____

☐ Other 2____

☐ Other 3____

Comments

____
____
____

Attachments

☐ Booking Accommodation list

☐ Agenda

☐ Hotel confirmations (Enter No of confirmations)

☐ Other____

BEFORE THE MEETING

RELATED TO THE MEETING

☐Book room

☐Order catering

☐Order snacks

☐Prepare attendance form with appropriate logos

☐Print welcome note with appropriate logos

☐Prepare meeting room (projector, pads, pens)

☐Inform the hotel on the setup and other details

☐Print evaluation forms

☐Prepare participant nametags

☐Ensure all of the above are transferred to the hotel room

☐Organise official dinners

RELATED TO PARTICIPANTS

☐ Send agenda and details of meeting (place, time, duration) to participants

AFTER THE MEETING

☐ Prepare evaluation report

☐ Sent evaluation report to manager

[These attachments can be found in electronic format on the enclosed CD]

Methodological Tool ID:	**28**
Methodological tool code:	**EUPA_LO_025_M _028**
Title of tool:	**Compose post meeting documentation**
Learning Outcome Number and Title:	**LO025: Be able to produce all post-meeting documentation after a routine meeting and explain the organisation and support provided for meetings**
Individual or group exercise:	Group
Type of methodological tool:	Written Exercise, Role Play

Objective of the methodological tool:

After the completion of this simulation the participants will be in a position to:

- Compose meeting minutes

Description of the exercise:

The trainer selects three members of the group and provides them with a scenario for a meeting. The trainer also participates in the meeting and has the role of the facilitator. The rest of the learners have the role of the minutes' takers. After the end of the meeting, the learners, with the aid of laptops, compose and finalise their minutes. The different sets of minutes are provided to the participants participating in the meeting, and they are asked to identify those minutes that mostly reflect the meeting reality.

Exercise is accompanied by:

1. A minutes template

There is no right or wrong structure for minutes documents, provided that all necessary information is included. One minutes template provided by Microsoft Office is attached.

Attachments to the methodological tools:

1. **A minute templates**

Minutes	**[Meeting Title]** **[Meeting Date]** **[Meeting Time]** **[Meeting Location]**	
Meeting called by: **Type of meeting:** **Facilitator:** **Note taker:** **Timekeeper:** **Attendees:**		
	Agenda topics	
[**Time allotted**]	[**Agenda topic 1**]	
Discussion:		
Conclusions:		
Action items:	Person responsible:	Deadline:
[**Time allotted**]	[**Agenda topic 2**]	
Discussion:		
Conclusions:		
Action items:	Person responsible:	Deadline:

[This attachment can be found in electronic format on the enclosed CD]

Methodological Tool ID: **29**
Methodological tool code: **EUPA_LO_026_M _029**
Title of tool: **Using MS Outlook and a mobile phone calendar**
Learning Outcome Number and Title: **LO026: Be able to operate an electronic diary for business purposes to meet the needs of workgroups and customers**
Individual or group exercise: Individual
Type of methodological tool: Simulation

Objective of the methodological tool:

After the completion of this simulation the participants will be in a position to:

- Understand how to set up new diary entries in Outlook as well as in their mobile phones.

Description of the exercise:

The participants are given a page of a paper-based diary and are requested to enter the information in Microsoft Outlook, as well as in their mobile phones.

Exercise is accompanied by:

1. A paper-based daily calendar

Exercise solution:

The electronic calendar entries should be the same as the ones on the paper-based one provided.

Other comments to the trainer:

The important thing to note is whether the participants are able to use electronic calendars, that they have inputted all the information correctly and that they can actually use different types of electronic calendars.

Attachments to the methodological tools:

1. A paper-based daily calendar

Today's Work (02/02/2012)	
08:30	Meeting with Mr Smith My Office Estimated duration: 1 hour Reminder: ON
11:00	Attend the sales meeting Hilton Hotel Estimated duration: 3 hours Reminder: ON
20:00	Dinner with the Jefferson family The Ranch Reminder: ON

Methodological Tool ID:	**30**
Methodological tool code:	**EUPA_LO_027_M _030**
Title of tool:	**Electronic Vs Manual Systems**
Learning Outcome Number and Title:	**LO027: Be able to compare and contrast paper and electronic diary systems and report on findings to line manager**
Individual or group exercise:	Group
Type of methodological tool:	Simulation

Objective of the methodological tool:

After the completion of this simulation the participants will be in a position to:

- Compare the differences between paper and electronic diary systems

Description of the exercise:

The theme of the exercise is the reservation system for booking halls. Different reservations are being made by different employees in the company and each of them uses a daily reservation sheet to record the reservations made.

The participants are given four different daily reservation sheets.

The participants are requested to find a way to convert the system into an electronic one and, after doing so, to be able to discuss on the advantages of the electronic versus the manual system.

Exercise is accompanied by:

Four daily reservation sheets

Exercise solution:

The participants are expected to suggest one of the following solutions:

- Developing a different electronic calendar for each hall and sharing them between the co-workers dealing with reservations. They are not expected at this stage to actually develop the shared calendars but to suggest the content. They may print a calendar from Outlook and photocopy it for each hall.
- Development of an excel workbook where each worksheet will be the calendar for each hall.
- Other solutions may also exist.

Other comments to the trainer:

This exercise will help participants understand the benefits of an electronic diary system.

With an electronic diary system we can share the information with our colleagues. In this way common mistakes, such as double booking of the conference hall, can be avoided.

Information updates are made easily without the use of corrective pen or eraser.

Other issues should be highlighted.

- The current system does not allow the user to spot any mistakes visually.

Attachments to the methodological tools:

1. **Four daily Reservation sheets**

HALL DAILY RESERVATION SHEET
Date: 17/10/2011
Day: Monday
Name: Tsantili Athanasia
9:00 - 14:00 Hall B1 9:30 - 15:00 Hall B2 10:30-12:00 Hall B4
Date: 18/10/2011
Day: Monday
Name: Tsantili Athanasia
14:00-18:00 Hall G2 17:00-20:00 Hall B2
HALL DAILY RESERVATION SHEET

HALL DAILY RESERVATION SHEET
Date: 17/10/2011
Day: Monday
Name: Apostolidou Christina
9:00 - 14:00 Hall B1 10:00-15:00 Hall B2 10:30-12:00 Hall B4
Date: 19/10/2011
Day: Wednesday
Name: Apostolidou Christina
14:00-18:00 Hall G2 17:00-20:00 Hall B2
HALL DAILY RESERVATION SHEET

EUPA
Validation of Formal,Non-Formal and Informal Learning:
The case study of Personal Assistants

HALL DAILY RESERVATION SHEET
Date: 3/10/2011
Day: Monday
Name: Kordela Eleftheria
9:00 - 14:00 Hall G1 9:30 - 15:00 Hall G2 10:30-12:00 Hall B4
Date: 24/10/2011
Day: Monday
Name: Kordela Eleftheria
14:00-18:00 Hall G2 17:00-20:00 Hall B2 10:00-14:00 Hall B3 11:00-15:00 Hall B4
HALL DAILY RESERVATION SHEET

HALL DAILY RESERVATION SHEET
Date: 03/10/2011
Day: Monday
Name: Mesimeri Fay
9:00 - 14:00 Hall G1 9:30 -15:00 Hall B2 10:30-12:00 Hall B4
Date: 24/10/2011
Day:Monday
Name: Mesimeri Fay
15:00-18:00 Hall G2 17:00-20:00 Hall B1 17:00-20:00 Hall B2 10:00-14:00 Hall B4
HALL DAILY RESERVATION SHEET

[These attachments can be found in electronic format on the enclosed CD]

EUPA
Validation of Formal,Non-Formal and Informal Learning:
The case study of Personal Assistants

Methodological Tool ID:	**31**
Methodological tool code:	**EUPA_LO_028_M _031**
Title of tool:	**Please help Mary**
Learning Outcome Number and Title:	**LO028: Use diary systems to handle requests from others for new or modified diary entries in order to provide effective business support**
Individual or group exercise:	Group
Type of methodological tool:	Case study

Objective of the methodological tool:

After the completion of this case study the participants will be in a position to:

- Understand how to handle requests from others and organise the diary systems effectively

Description of the exercise:

The participants are given a case study and are requested to help Mary to cope with a very difficult situation.

The groups should read the case study and discuss it. Then each group must prepare a list of suggestions for Mary and present them to the class.

Exercise is accompanied by:

1. Case study: Please help Mary

Exercise solution:

Participants should demonstrate attention in the following:

- Identification of the need to leave some time during the day for urgent issues that may arise
- Flexibility for rescheduling if urgent issues arise
- In this case study, it is possibly better to reschedule the two supplier meetings, rather than to cancel the workshop which only takes place once every two years.

Other comments to the trainer:

Participants must demonstrate their understanding in handling urgent versus important issues. They should also demonstrate that they are able to realise that it is not feasible to add the activities required in the day (provided that Mary has to also attend the dinner) and therefore rescheduling is needed to accommodate urgent and important issues.

Attachments to the methodological tools:

1. **CASE STUDY: PLEASE HELP MARY**

Mary has been Mr Thomson's personal assistant for the last five years. Working with a company of 204 employees, Mary is Mr. Thomson's most important person in the company. She is basically managing his office.

Today is Wednesday the 7th of March and Mary has the following daily plan (calendar and task list):

09:00-10:00	Briefing by Mr Thomson regarding the conference (discussion on the details) (1)
11:00-11:30	Meeting with a new supplier on new file management system (2)
13:00-13:30	Meeting with an existing supplier to discuss an issue with the quality with some of his supplies
14:00-16:00	Attend a workshop for executive secretaries and personal assistants (3)

1. The conference is a very important event organised by the company every year. It is an international event. The conference will take place on the 3rd of July. Mary has the key responsibility for this event. Today, they will finalise the list of speakers and will take some decisions on the layout of the invitation. The venue will also be confirmed.

2. The meeting was requested by the supplier. He wants to present to Mary a new type of file management system. Although it is not in the near future plans of the company to change the file management system, Mary thought that it would be a good idea to have it in mind. Also, the supplier was very eager to get this appointment.

3. This workshop is organised by the leader in organising events for personal assistants. It is only organised once every two years and always handles very specific and advanced issues needed by personal assistants.

This year the topic is event management for personal assistants.

Task list

- Prepare the invitations for the conference. This can only be done once the meeting with Mr Thomson is completed and decisions have been taken (Estimated duration of activity: 2 hours)
- Finalise venue for the conference and send confirmed booking by email (Estimated duration of activity: 2 hours)

Mary arrived at the office at 7:45 as usual (15 minutes earlier than her working time). She prepared her coffee and reviewed her calendar and task list.

She started dealing with the mail and then she prepared for the meeting with Mr Thomson. She needed to:

- Take to the meeting all the venue tenders to finalise the decision regarding the venue.
- Take to the meeting the samples of the invitation in order to finalise the decision on the invitation.

At 8:30 Mr Thomson arrives at the office and at 9 o'clock they have the meeting as scheduled and all needed decisions are finalised. Mary returns to her desk to start working on her tasks before her next meeting.

The telephone rings to change her day completely. She diverts the phone to Mr Thomson and they are being informed that one of their key associates, Mr Perry, is arriving to Cyprus unexpectedly tonight for something urgent and he wants to take the opportunity to discuss about a new contract with Mr Thomson. They have received the proposal ten days ago but they did not have time to look into it. . .

Mr Thomson calls her at his office immediately. She can tell that he is stressed.

Mary has to make all the arrangements (except the flight - he has already taken care of it). More specifically:

- She needs to book for accommodation
- She needs to book for a taxi to take him to the hotel
- She has to make dinner arrangements for tonight and she also has to attend the dinner
- She has to cancel all next day's appointments for Mr Thomson since he will have to spend the whole day with Mr Perry

Mary is panicking. She has three more meetings in the day and many unfulfilled tasks. It seems that time is not enough to complete her work.

What do you suggest she should do?

Methodological Tool ID:	**32**
Methodological tool code:	**EUPA_LO_029_M _032**
Title of tool:	**Maintain it up to date**
Learning Outcome Number and Title:	**LO029: Be able to make accurate diary entries and maintain an up to date system**
Individual or group exercise:	Individual
Type of methodological tool:	Case study

Objective of the methodological tool:

After the completion of this case study the participants will be in a position to:

- Make accurate entries and Maintain an up to day diary

Description of the exercise:

The participants are given some tasks that a PA has to fulfil and are related to diary entries. They have to add entries in the diaries and spot any issues. Whenever a diary entry is possible it is being added to the calendar. Whenever a diary entry is not possible an action is entered on the master list.

Exercise is accompanied by:

1. Case study
2. A paper-based diary in monthly form (copies of the daily form may be made by the trainer)
3. A master list

Exercise solution:

Participants need to pay attention to the details. For example, the cocktail on the 10th of July requires travelling to another city, therefore the meeting with the government agency must be rescheduled.

A similar issue appears on the 4th of July with the project meeting and the meeting regarding photocopiers.

In addition to the above, there are meetings that are conflicting, such as on the 4th of July at 15:00; we have the customer meeting and the meeting regarding the photocopiers that should be rescheduled since there is another meeting at 14:00.

The following should appear on the Master List:

- Propose a different day for the customer meeting (and inform the line manager that the proposed day for Mr. Gregory is not available)
- Propose a different day for the government agency

1. **<u>Case Study: Maintain it up to date</u>**

Imagine that you are Mr. Gregory's personal assistant Susan. You work at 'The Perfectionists' in Nicosia. Follow the instructions below:

1. Susan starts the day by opening the mail.

i One mail item is a cocktail party on the 10th of July at 18:00 organised by the Chamber. Mr. Gregory is an active member of the Chamber. The cocktail will take place at the Crown Resort in Limassol.

ii A personal letter from the headmaster of Mr. Gregory's daughter inviting him to attend a meeting to discuss vital issues related to the operation of the school. The meeting is on the 4th of July at 16:00 at the school premises.

2. (Mr. Gregory), "Susan, I finally managed to get the appointment with the minister. You realise how important this is. Please add it in my diary immediately"

Meeting with the minister: 3rd of July 2012 at 10:00

3. Phone call

(Caller) 'Good morning, I am calling regarding the photocopiers. I would like to make an appointment with Mr. Gregory.'

(Susan) Hello, this is Susan. May I ask who is calling please?

(Caller) Oh hello Susan. My name is Ms. Smith.

(Susan) Hello Ms Smith. Mr. Gregory is actually very busy in July due to the forthcoming exhibition but I will speak to him and let you know. May I ask the reason of the meeting?

(Caller) Sure. A while ago we spoke for a maintenance contract for your printers and photocopiers. I am ready to present our proposal.

(Susan) Great. I will get back to you.

i. Susan calls her boss right away but the line is busy. In the meantime his next appointment comes and she goes to the kitchenette to bring some coffee.

[Move from your desk to the coffee area or somewhere else in the office and return in five minutes]

ii. The following email arrives

Dear Susan

I am referring to the project ICT-EQ and I would like to inform you that the meeting has been arranged tentatively for the 4th of July at 14:00. Due to the high level of importance of the meeting, we request that all stakeholders will be present. Please confirm Mr. Gregory's availability. Lunch will be provided during the meeting.

iii Susan calls Mr. Gregory again to arrange the meeting regarding the photocopiers. He suggests the 4th of July at 15:00.

4. Another email arrives from a government department responsible for monitoring and evaluating the work of your organisation

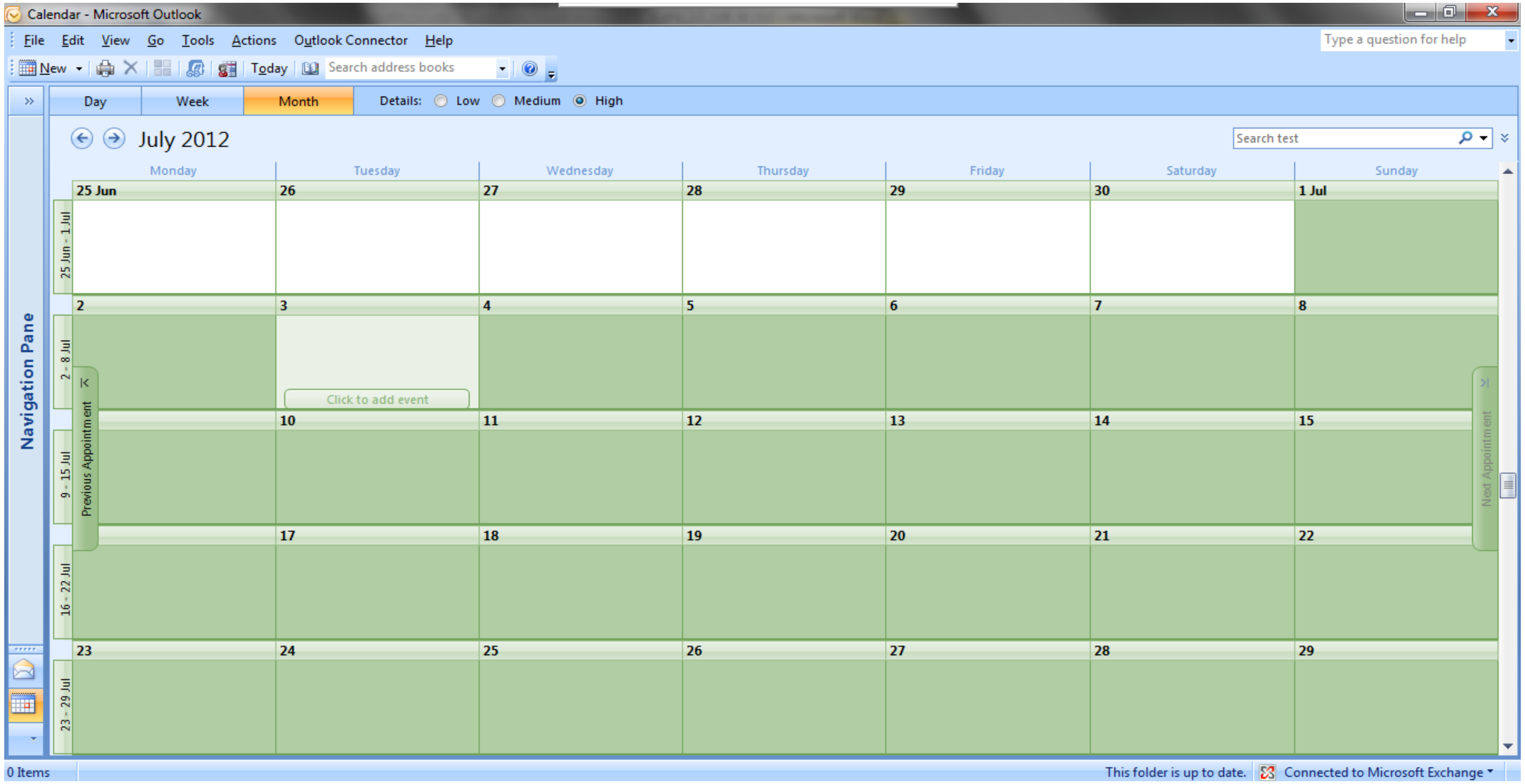
Dear Susan,

I do hope you are very well. As you know the evaluation period is approaching and I would like to organise a meeting with "The Perfectionists" in order to present your work for the current semester. Mr. Maggie and I suggest the 10th of July at 16:00. The meeting will take place in our offices. Presentation equipment will be provided (please let me know what you will need). Please confirm your and Mr. Gregory's availability at your earliest convenience.

5. Telephone call from one of the line managers

Hi Susan. I am closing a deal with a very important customer. He wants to meet Tony (Mr. Gregory).
Can we do it on the 4th of July at 15:00?

2. **A paper-based diary**



[These attachments can be found in electronic format on the enclosed CD]

3. **Master List**

Methodological Tool ID:	**33**
Methodological tool code:	**EUPA_LO_030_M _033**
Title of tool:	**Different types of customers, always professional!**
Learning Outcome Number and Title:	**LO030: Be able to welcome visitors and customers in a professional manner, identify the purpose of their visit and make them feel welcome during their period of waiting**
Individual or group exercise:	Group
Type of methodological tool:	Role Play

Objective of the methodological tool:

After the completion of this simulation the participants will be in a position to:

- treat visitors with professionalism

Description of the exercise:

The learners are requested to play a role in order to demonstrate their ability to handle visitors. The trainer will select two members of the group, one to have the role of the personal assistant and the other to have the role of the customer/visitor. The learner-visitor will move outside the room with the trainer and will select a scenario card. The scenario will be discussed with the trainer (to ensure that the learner will fulfill the requirements of the role) and then both trainer and learner will move back to the training room where the role play begins.

The challenge is for the learner having the role of the personal assistant to welcome and respond appropriately to the customer.

The role play should last 2-5 minutes. The rest of the group takes notes on several issues of the role play, such as words used, body language, actions etc.

Exercise is accompanied by:

1. Scenario cards

Exercise solution:

Not Applicable

Other comments to the trainer:

The trainer should also be taking notes during the role play and discuss on the comments of the group. One addition to the exercise would be for the trainer to videotape the role play, so that it can be played back after the discussion, for more in-depth analysis.

Attachments to the methodological tools:

1. **Scenario Cards**

SCENARIO 1 A polite visitor that has an appointment with the manager. However, the previous appointment is running a bit late.
SCENARIO 2 A very angry customer. He bought our product but it stopped working after a week. Moreover, he is not happy with the response of one of our co-workers and demands to see the manager. He does not have an appointment.
SCENARIO 3 An international associate. He came for a scheduled project meeting, but his flight arrived earlier. He came directly to our offices because his hotel room is not going to be ready until twelve. He did not sleep all night because he was travelling, and he carries his luggage and laptop. He wants to send an email from his laptop but his adaptor is not appropriate for use in our country.

[These attachments can be found in electronic format on the enclosed CD]

Methodological Tool ID: **34**
Methodological tool code: **EUPA_LO_031_M _034**
Title of tool: **Different scenarios of customers, always appropriate body language**
Learning Outcome Number and Title: **LO031: Be able to use appropriate tone and body language when dealing with visitors and customers**
Individual or group exercise: Group
Type of methodological tool: Role Play

Objective of the methodological tool:

After the completion of this methodological tool the learners will be able to identify that the appropriate body language can enhance customer relationships, and also understand that the body language can act as a barrier to positive customer relationships.

Description of the exercise:

The learners are requested to play a role **using only their body language** in order to demonstrate their ability to handle visitors. The trainer will select two members of the group, one to have the role of the personal assistant and the other to have the role of the customer/visitor. The learner-visitor will move outside the room with the trainer and will select a scenario card. The scenario will be discussed with the trainer (to ensure that the learner will fulfill the requirements of the role) and then both trainer and learner will move back to the training room where the role play begins. It should be noted that both learners use only their body language.

The challenge is for the learner having the role of the personal assistant to welcome and respond appropriately to the customer using his/her body language.

The role play should last 2-3 minutes. The rest of the group must comment on the body language of the learner-personal assistant, although it is also of interest to comment on the body language of the customer/visitor to identify whether the first learner has also managed to play his/her role appropriately.

Exercise is accompanied by:

1. Scenario cards

Exercise solution:

Not Applicable

However an appropriate handshake, open movement, and a smile are some of the body language signals that support customer relationships.

Other comments to the trainer:

The trainer should also be taking notes during the role play and discuss on the comments of the group. One addition to the exercise would be for the trainer to videotape the role play, so that it can be played back after the discussion, for more in-depth analysis.

Attachments to the methodological tools:

1. **Scenario Cards**

SCENARIO 1 A polite visitor that has an appointment with the manager. However, the previous appointment is running a bit late.
SCENARIO 2 A very angry customer. He bought our product but it stopped working after a week. Moreover, he is not happy with the response of one of our co-workers and demands to see the manager. He does not have an appointment.
SCENARIO 3 An international associate. He came for a scheduled project meeting, but his flight arrived earlier. He came directly to our offices because his hotel room is not going to be ready until twelve. He did not sleep all night because he was travelling, and he carries his luggage and laptop. He wants to send an email from his laptop but his adaptor is not appropriate for use in our country.

[These attachments can be found in electronic format on the enclosed CD]

Methodological Tool ID:	**35**
Methodological tool code:	**EUPA_LO_032_M _035**
Title of tool:	**A picture for customer care**
Learning Outcome Number and Title:	**LO032: Demonstrate a basic understanding of customer care principles and be able to apply these in an effective way, including the ability to solve routine problems using simple rules to the satisfaction of visitors and customers**
Individual or group exercise:	Group
Type of methodological tool:	Creative Group Work

Objective of the methodological tool:

After the completion of this methodological tool the learners will be able to summarise and have an in depth understanding of the key principles of customer care.

Description of the exercise:

The learners form groups of 4 or 5 players and are requested to create a poster on customer care, using several types of materials (magazines, highlighters, and any material they want). The poster should summarize the key principles of customer care in a clever and creative way. Each of the groups will present their work to a committee explaining why and how their poster reflects customer care principles.

The committee will vote for the best poster.

Exercise is accompanied by:

1. Different materials such as highlighters, magazines and so on.

Exercise solution:

Not Applicable

Other comments to the trainer:

This methodological tool is not an exercise on the artistic skills of the group. This should be made very clear to the group. The main principle is to demonstrate an in depth understanding of customer care principles.

Methodological Tool ID:	**36**
Methodological tool code:	**EUPA_LO_033_M _036**
Title of tool:	**Creating professional documents**
Learning Outcome Number and Title:	**LO033: Demonstrate ability to use word processing software safely and securely to produce simple presentations that meet the requirements of the office**
Individual or group exercise:	Individual
Type of methodological tool:	Exercise using ICT

Objective of the methodological tool:

After the completion of this exercise the participants will be in a position to:

- Create, format, save and print a document.
- Create and format a table

Description of the exercise:

Part A:

The participants are given the document presented in the next page and are requested to create, format, save and print it. Then, participants must close and open the document again.

PART B:

Participants are requested to create two tables.

Exercise is accompanied by:

1. A document to be reproduced by the learners
2. A table to be reproduced by the learners

Exercise solution:

As presented by the document to be reproduced by the learners.

Other comments to the trainer:

The trainer should pay attention to details of formatting.

Attachments to the methodological tools:

1. **A document**

Create the following document

Measuring Customer Satisfaction - Theory and Practice

The theory on customer satisfaction

Center, Bold, 12 points

A customer is satisfied when his expectations are met.

Expectations are desires or wants of consumers which are formed on the basis of previous experience with a company and its marketing mix inputs ([physical evidence, process and people) i.e. if the customer expects to receive an accurate bill when he checks out from the hotel then this is an expectation.

Left and right indent of 1", bold and Italics, justified paragraph, double line spacing

Therefore identification of the customers' expectations is important for two major reasons:

1. It enables the marketing researcher to identify the determinants of customer satisfaction
2. It enables the firm to allocate its resources correctly i.e. the firm should not invest in resources that the customer does not value.

Numbering

Customer expectations are influenced by:

- **Word of mouth communications**
- **Personal Needs and**
- **Past Experience**

Bold 14 points

2. A table

1. Create the following table

Seminar Code	**Seminar Description**	**Duration**	**Price**
2309WINVISTA	Introduction to Windows Vista	12	69.00
1010WORD	Word 2003 for Windows	24	109.00
2010ACCESS	Database design, Creation and use for efficient management and strategic marketing	33	159.00

2. Format your table to look like the one below

SEMINARS			
Seminar Code	Seminar Description	Duration	Price
2309WINVISTA	Introduction to Windows Vista	12	69.00
1010WORD	Word 2000 for Windows	24	109.00
2010ACCESS	Database design, Creation and use for efficient management and strategic marketing	33	159.00
Total Seminar's Price			337.00

[These attachments can be found in electronic format on the enclosed CD]

Methodological Tool ID: **37**

Methodological tool code: **EUPA_LO_034_M _037**

Title of tool: **Practice the creation of spreadsheets with formulas**

Learning Outcome Number and Title: **LO034: Use a spreadsheet safely and securely to enter, edit and organise numerical and other data. Select and use appropriate formulas and data analysis tools and techniques to meet the routine requirements of the office. Use tools and techniques to present, format and publish spreadsheet information**

Individual or group exercise: Individual

Type of methodological tool: Exercise using ICT

Objective of the methodological tool:

After the completion of this exercise the participants will be in a position to:

- Create and format an excel spreadsheet
- Use basic tools of excel software

Description of the exercise:

Learners are requested to develop a spreadsheet, which is presented in the next page. The yellow cells in the spreadsheet indicate the need for the learner to enter a formula. The learner should also pay attention to the merged cells, the formatting of the cells, the page layout etc.

Exercise is accompanied by:

1. A printout of an Excel spreadsheet to be created

Other comments to the trainer:

Attention should be paid to detail in terms of formatting, as well as the correct use of formulas. The trainer should ensure that formulas have actually been entered and that the learner did not just enter the number.

Attachments to the methodological tools:

1. **The Excel spreadsheet**

Exercise 1 - Practice on AutoSum

Students:

Cells which are shaded contain formulas

	First Quarter	Second Quarter	Third Quarter	Totals
Period 1	147000	227000	458000	**832000**
Period 2	169050	261050	526700	**956800**
Period 3	194408	300208	605705	**1100321**
Period 4	223569	345239	696561	**1265369**
Totals	**734027**	**1133497**	**2286966**	**4154490**

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Exercise 2 - Practice on Subtraction

Months	Sales	Expenses	Profits
January	320	115	**205**
February	195	100	**95**
March	230	125	**105**
Total	**745**	**340**	**405**

Exercise 3 - Practice on Multiplication

Product	Qty	Unit Price	Total Cost
Chairs	£ 60.00	£ 25.00	**£ 1,500.00**
Tables	£ 20.00	£ 55.00	**£ 1,100.00**
Plates	£ 200.00	£ 15.00	**£ 3,000.00**
Cutlery	£ 500.00	£ 15.00	**£ 7,500.00**

Linen	£ 100.00	£ 35.00	**£ 3,500.00**

Exercise 4 - Practice on Division

Variance Amount =

Variance % =

Food Distributors Ltd

		Standard Performance	Actual Performance	Variance Amount	Variance
	Total Sales	6000	7000	**1000**	**0.16667**
	Total Expenses	3100	3500	**400**	**0.12903**
	Net Revenue	2900	3500	**600**	**0.2069**
Region A	Miles Travelled per Salesman	600	550	**-50**	**-0.08333**
	Units sold per person	180	210	**30**	**0.16667**
	Pounds sold per salesman	800	900	**100**	**0.125**
	New accounts opened	100	160	**60**	**0.6**
			Total	**2140**	**1.3109**

	Total Sales	8000	7000
	Total Expenses	4500	5000
	Net Revenue	3500	3000
Region B	Miles Travel per Salesman	500	500
	Units Sold per person	50	40
	Pounds sold per salesman	100	900
	New accounts opened	20	30
			Total

[These attachments can be found in electronic format on the enclosed CD]

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Methodological Tool ID:	**38**
Methodological tool code:	**EUPA_LO_035_M _038**
Title of tool:	**Creating a professional presentation**
Learning Outcome Number and Title:	**LO035: Demonstrate ability to use presentation software safely and securely to produce simple electronic presentations that meet the requirements of the office and evaluate the outcomes**
Individual or group exercise:	Individual
Type of methodological tool:	Exercise using ICT

Objective of the methodological tool:

After the completion of this exercise the participants will be in a position to:

1. Produce a simple presentation using PowerPoint.

Description of the exercise:

Learners are asked to develop a presentation on a topic of their selection (5- 10 slides). Their effort should demonstrate their ability to add pictures to the presentation as well as to use different slide layouts.

Learners are encouraged to develop a presentation related to their role as a personal assistant. For example, some topics could be:

- The role of personal assistant in a modern EU company
- The profile of a successful personal assistant
- Presenting myself and my work

Other comments to the trainer:

Presentations can be created in their mother language. Learners may present the presentations they have created.

Methodological Tool ID:	**39**
Methodological tool code:	**EUPA_LO_036_M _039**
Title of tool:	**Internet**
Learning Outcome Number and Title:	**LO036: Demonstrate ability to connect to internet sites safely and securely using browser software and search tools including identification of relevant business sites and communicating information online as required by the office**
Individual or group exercise:	Individual
Type of methodological tool:	Exercise using ICT

Objective of the methodological tool:

After the completion of this exercise the participants will be in a position to:

- Use the world wide web to perform simple tasks

Description of the exercise:

Participants will be asked to:

- Search and provide information on a specific topic, such as providers of filing services or green entrepreneurship and companies.
- Search and identify possible flights and accommodation for a specific destination.

Other comments to the trainer:

The trainer should focus on the amount of information identified through the search and the ability of the participant to utilise different search engines, etc. As far as the possible flights and accommodation are concerned, the ability of the participant to provide alternatives together with detailed information for each of the alternatives should be considered.

Methodological Tool ID:	**40**
Methodological tool code:	**EUPA_LO_037_M _040**
Title of tool:	**Email**
Learning Outcome Number and Title:	**LO037: Demonstrate ability to use email software tools techniques to compose and send messages; manage incoming email efficiently, safely and securely to meet the requirements of the office**
Individual or group exercise:	Individual
Type of methodological tool:	Written Exercise, Exercise using ICT

Objective of the methodological tool:

After the completion of this exercise the participants will be in a position to:

- Send a simple email
- Use Instant messaging
- Use social networking programs

Description of the exercise:

Learners are requested to create and send an email, which is presented in the next page. The learner should pay attention to the formatting of the text.

Exercise is accompanied by:

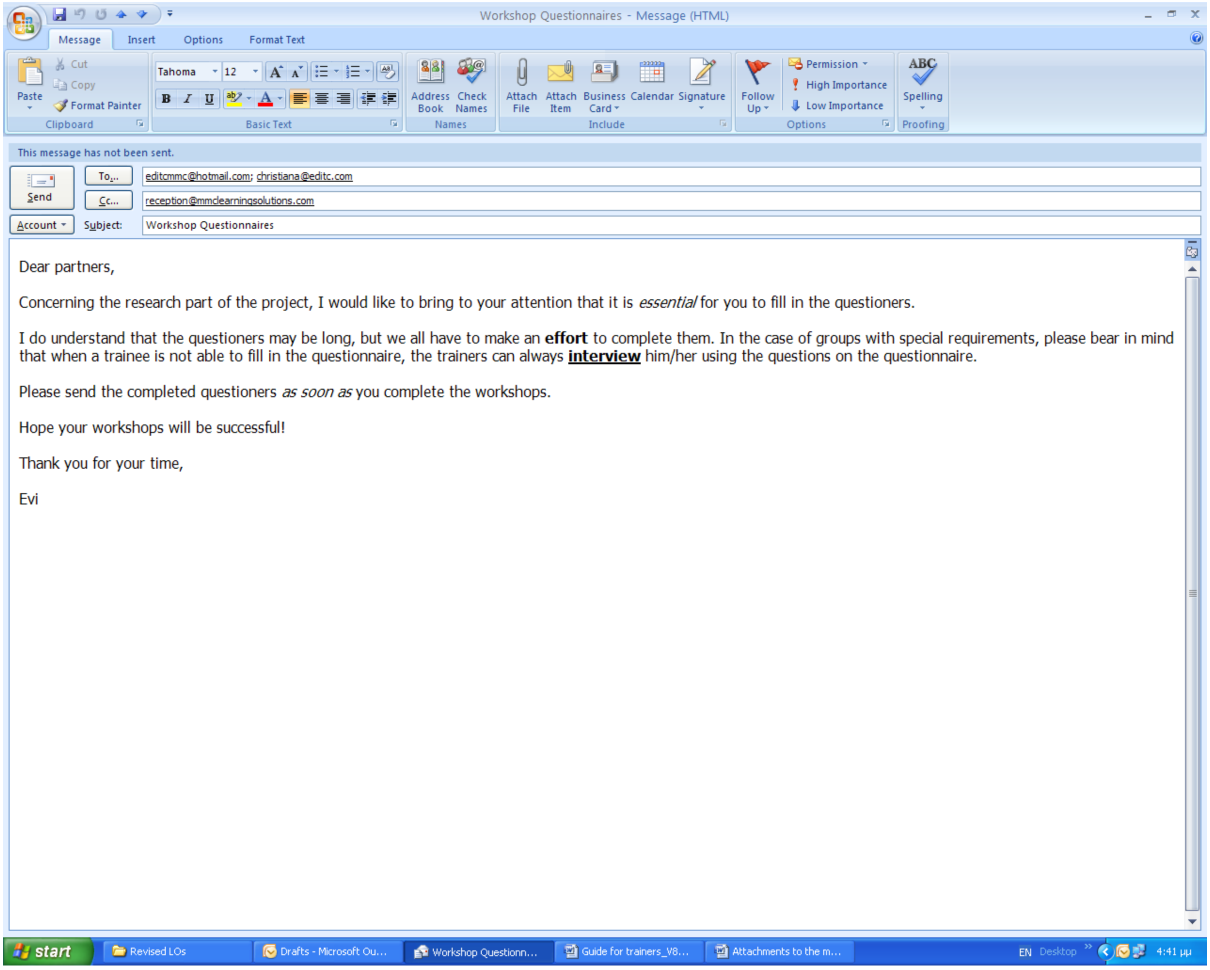
1. A printout of an email to be created, to be sent to:
   - editcmmc@hotmail.com
   - christiana@editc.com

Other comments to the trainer:

An attachment can be provided electronically, so that participants use this function as well.

Attachments to the methodological tools:

1. Email



[This attachment can be found in electronic format on the enclosed CD]

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