

# Office Administration

**6622 18 weeks**

**6621 36 weeks**

## Instructional Scenarios

### Time Management

#### How Can I Help Everybody?

##### Duty Areas

- Developing Communication Skills
- Organizing and Planning Functions

##### Scenario

Mary, a receptionist, has been employed at Washington Business Systems for less than a year. Her attendance record and the quality of her work are excellent. Her employer has often complimented Mary on her excellent rapport with customers. Mary comes from a large family. Her siblings have frequent problems and rely on her for advice. As a result, she receives between three and five telephone calls at work each day from her family. In addition, Mary may receive emails from her family members at work each day. Mary was raised with a strong sense of family commitment, so she believes all these personal family problems can and should be given attention, even during work time. Mary feels that these calls and emails are not affecting her customers on the telephone or at her desk because they receive her immediate attention and are her priority.

##### Big Question

Should personal calls be allowed during the workday? Explain.

##### Focused Questions

1. What do you think of Mary's attitude and beliefs?
2. Do you think that Mary's customers are receiving her immediate attention and are her priority all day on the job? Explain.
3. What are some possible solutions to Mary's dilemma?

##### SOL Correlation

*English 11.4, 11.10, 12.4*

##### Project-Based Assessment

- Small-group presentation/discussion on big and focused questions

- Written report/assignment, answering all questions

## Resources

- *Office Skills*. Thomson/South-Western. ISBN: 0-538-43485-6
- *Personal Development for Life and Work*. Thomson/South-Western. ISBN: (8th ed.) 0-538-69795-4 or (9th ed.) 0-538-44148-8

## Help, I'm Drowning!

### Duty Areas

- Developing Communication Skills
- Organizing and Planning Functions

### Scenario

Walter works as an administrative assistant for five real estate agents. He also answers the phone and greets potential clients when they drop in at the agency office. He shares his feelings as follows: “It seems like I’m in a swamp with a bunch of alligators. The agents are constantly bringing in work that they want done immediately. They always seem to expect me to drop everything to do their work. Even when the workload slacks off, I feel so disorganized; it seems impossible to get caught up. I can’t concentrate on anything for very long because clients keep coming in and interrupting me. Then there’s the telephone—the worst interruption of all. I think I’m going to scream! I don’t even have time to check my personal email some days.” You are a close friend of Walter’s. He confides his opinion to you one day while you are having lunch together.

### Big Question

As a trusted friend, what advice would you give Walter?

### Focused Questions

1. What do you think of Walter’s attitude and beliefs in this situation?
2. Do you think that Walter might try keeping a daily time log? Why, or Why not?
3. Does prioritizing help with organizing work and time management? How?
4. Should employees communicate with their personal email on the job? Explain.

### SOL Correlation

*English* 11.4, 11.10, 12.4

### Project-Based Assessment

- Small-group presentation/discussion on big and focused questions
- Written report/assignment, answering all questions
- Detailed daily time log and written follow-up. Did you learn of any time management strategies you could use to improve your performance? Explain.

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## **Where's My Work Desk?**

### **Duty Areas**

- Developing Communication Skills
- Organizing and Planning Functions

### **Scenario**

Jasper Wallace has a basket on his desk marked for incoming work. He has asked his supervisor several times to place any work for his attention in this basket, since his desk tends to get cluttered because of interruptions throughout the day. Nevertheless, his supervisor repeatedly comes in asking for work that Jasper has never seen. When he looks through the piles of paper on this desk, Jasper finds the requested items.

### **Big Question**

Does an organized desk assist with effective time management? Explain.

### **Focused Questions**

1. What could Jasper do to help improve this situation?
2. Would it be helpful to communicate once again with his supervisor?
3. What might he say to his supervisor?

### **SOL Correlation**

English 11.4, 11.10, 12.4

### **Project-Based Assessment**

- Small-group presentation/discussion on big and focused questions
- Written report/assignment, answering all questions

### **Resources**

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## **Time Is Money**

### **Duty Areas**

- Developing Communication Skills
- Organizing and Planning Functions

## Scenario

The clerk in a law office has been asked to keep a daily log of the work assignments that are completed. This log is to include the amount of time spent on paperwork for individual clients as well as the amount spent on general office tasks. The employer uses this log to determine how much time should be billed to each client. The clerk sometimes spends more time on a project than the boss would consider reasonable, so the clerk will adjust the time record. On other occasions the clerk might forget to make note of the time spent on each task and will construct a log based on estimates. Since the employer has never questioned the recordings in the daily log, the clerk is confident that the entries are reasonable.

## Big Questions

1. Does the clerk handle this situation ethically?
2. Does keeping a daily log of assignments help an employee stay organized and manage their time effectively? Explain.

## Focused Questions

1. Is this method of keeping the daily log ethical? Why, or why not?
2. How might the clerk and the employer benefit by providing the precise length of time spent on each task?

## SOL Correlation

English 11.4, 11.10, 12.4

## Project-Based Assessment

- Small-group presentation/discussion on big and focused questions
- Written report/assignment, answering all questions

## Resources

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## Let Me Check the Calendar

### Duty Areas

- Developing Communication Skills
- Organizing and Planning Functions

## Scenario

Katie was in the habit of scheduling her employer's appointments and carefully keeping a calendar of events. One day, Katie woke up with a terrible cold and felt she should not go to the office. She called her employer and explained. When Katie returned to the office, someone else had done the scheduling. That person had set

some overlapping appointments and had not blocked out time for a special meeting for her employer. In addition, the person had ignored a block of time (two weeks) that Katie had blocked due to her employer's vacation. There are now twelve clients scheduled during this time period on her employer's calendar.

## **Big Question**

How can Katie fix the scheduling (calendar) situation?

## **Focused Questions**

- How should Katie prioritize the scheduling events for her employer's calendar?
- How should Katie explain the corrections to the clients?
- What could be done in the future to avoid this problem?

## **SOL Correlation**

English 11.4, 11.10, 12.4

## **Project-Based Assessment**

- Small-group presentation/discussion on big and focused questions
- Written report/assignment, answering all questions

## **Resources**

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## **Assisting Employees**

### **Duty Area**

- Assisting Employees

### **Scenario**

Crystal, a human resources analyst, has recently been assigned the task of timekeeping and entering employee deductions for payroll. She needs to ensure that no errors are made and that each employee receives their proper pay for the month. While Crystal understands that these duties have been assigned to her, she notices that her two other co-analysts are not nearly as busy. Among her responsibilities are ensuring that employees have signed their timesheets, entering the correct number of hours worked for each week, notifying employees when their hours are not sufficient, and ensuring that benefit deductions have been updated in the payroll system, as well as any salary changes in multiple systems. Crystal feels overwhelmed by her workload but doesn't feel like she is in a position to assign tasks to others as she is not a supervisor.

## **Big Questions**

- Should Crystal ask for help?

- How can Crystal minimize the feeling that she is drowning in work?

### **Focused Questions**

- How should Crystal approach her supervisor for help?
- What documents might Crystal present to explain the overwhelming workload she has?
- What tools might Crystal use to manage her duties more effectively?

### **Project-Based Assessment**

- Create a task list with payroll priorities as a team project.
- Create a dialogue of what Crystal should say to her supervisor asking for help and act it out in front of the class.
- Write a one-page paper about workload fairness and the distribution of tasks within a team setting.

### **Resources**

SHRM, the Society for Human Resource Management ([www.shrm.org](http://www.shrm.org))

### **Keep It Together**

#### **Duty Area**

- Managing Information
- Processing Information and Data

#### **Scenario**

Skylar recently accepted a position as an administrative assistant for a growing consulting firm. The company added more services to their profile, which doubled their clientele and created the need for additional consultants.

Skylar quickly learned that the current filing system lacked consistency and overall organization. It was difficult to determine which consultants handled the various accounts held by clients. As a result, Skylar often contacted clients to gather information that was previously given. Since the company only had two desktop computers, the clients' profiles and other pertinent information were stored in boxes near Skylar's desk.

#### **Big Question**

- What is the most effective way to store clients' records for easy access?

### **Focused Questions**

- What steps should management take to develop a new filing system?
- How should the manager implement this change?
- Once the filing system is in place, which employees should be responsible for routine updates and maintenance?

### **Project-Based Assessment**

- Small-group presentation/discussion on big and focused questions
- Written assignment answering all questions
- Rubric scoring

## **Resources**

- ARMA International. [www.arma.org](http://www.arma.org). (2021).
- Professional Communication. The Goodheart-Wilcox Company, Inc. ISBN: 978-1-63126-128-2
- Professionalism Skills for Workplace Success. Lydia E. Anderson, Sandra B. Bolt. ISBN: 10:0-32-195944-2

## **How Should I Say This?**

### **Duty Area**

- Developing Communication Skills

### **Scenario**

Morgan works as a supervisor who monitors home-based customer service representatives. Her job involves assisting representatives, instilling a sense of belonging within the organization, and finding solutions to maintain and/or improve the overall quality of work.

It was recently brought to Morgan's attention that two clients had complained about a representative making frequent errors on their accounts. Morgan has to talk to the representative to address the situation. She doesn't know the representative very well, and has never met him in person, and she is not sure how to approach him.

### **Big Question**

- How should Morgan address this issue?

### **Focused Questions**

- What form of communication should Morgan choose to reach out to the representative?
- How can Morgan ensure that her tone is constructive and will be received well by the representative?
- Should Morgan involve other people in the conversation?

### **Project-Based Assessment**

- Small-group discussion on big and focused questions
- Written assignment answering all questions
- Role playing

## **Resources**

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- Professionalism Skills for Workplace Success. Lydia E. Anderson, Sandra B. Bolt. ISBN:10:0-32-195944-2

- Rubin, D. (2016) Wait, How Do I Write This Email? ISBN: 978-0-9963499-2-5

## **Can I Cash My Paycheck?**

### **Duty Area**

- Managing Financial Functions

### **Scenario**

A large marketing firm started receiving complaints from vendors and contractors who had not yet received payments for work completed. Later, the company discovered that even their own employees had not received scheduled salary increases in their accounts. After an extensive audit of all financial records, it was discovered that the administrative assistant had not been making timely deposits of income received, was placing funds in the incorrect accounts, and was entering erroneous information into the payroll system. In the three months she had been employed in this company, she had not reconciled the bank statement nor had any contact with the financial institutions handling the company funds.

### **Big Question**

- Should only one employee be allowed to have total control over the financial records of a company?

### **Focused Questions**

- How can employees ensure that new hires have the necessary skills to perform well in a position?
- What are possible solutions for correcting financial errors and ensuring employees and contractors receive payment for their services?

### **Project-Based Assessment**

- Small-group presentation and/or discussion on big and focused questions
- Individual research relating to proper accounting practices in a business setting
- Written report/assignment, answering all questions

### **Resources**

- MBA Office Management Modules

## **Attention to Detail**

### **Scenario**

You are an assistant to a local accountant. Your manager asked you to look over a client's previous year's tax return and compare it to the information they submitted this year. You noticed that the client received a K-1 from XYZ Corporation last year, but received a 1099 from the same corporation this year. Receiving a 1099 from XYZ Corporation may cause your client to owe more taxes this year than they should have to pay.

### **Big Question**



- Why is attention to detail important in the office setting?

### **Focused Questions**

- Should you bring this detail to your manager's attention, or mark off that you received information from XYZ Corporation? Explain your answer.
- How would you explain the different tax implications of a K-1 and a 1099 to the client?

### **Project-Based Assessment**

- Oral discussion, answering all questions
- Written report/assignment, answering all questions

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