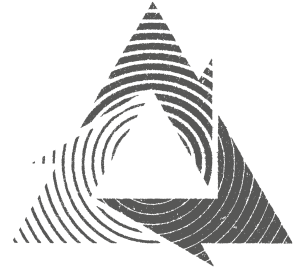

9

TRAINING MODULE 9

The Office



Module updated: 09 June 2020

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Introduction

This module is a bit different from those you have done before. It is pretty much all based on practical work.

The office is where the IT and any other office equipment necessary to run the enterprise is kept. Most ‘paperwork’ is now done on the computer, so learning a bit about some of the programmes used and how they relate to the various office functions is important.

You might already be proficient in the office environment. In that case, you’ve just got less work to do on this module. But remember that everything in this module will help you develop ‘transferable skills’ relevant to any employment you end up in. Should you have no computer experience, your Trainer will take you through basic computer functions and programmes until you are ready to complete Sections 2 and 3.

In **Section 1** we outline the importance of good telephone manner. In **Section 2** we look at the kind of things done on the computer and in **Section 3** there are some computer-based tasks to carry out.

The learning outcomes of module 9

After successfully completing this module, you will be able to:

- Adopt a good telephone style
- Understand the main functions of the computer at your enterprise
- Understand the uses of various Microsoft programmes
- Get more proficient at carrying out basic computer functions

Section 1—The telephone

The telephone

In wood recycling enterprises, as in most organisations, the phone is a vital way of communicating with customers, potential customers, workers and suppliers. It is the way many people first encounter the enterprise—and first impressions count! So how we handle phone calls is extremely important. Business can be won or lost on the strength of how we come across on the phone.

So we must always sound **organized, interested** and, above all, **courteous**.

By now we guess that you will have a reasonable understanding of the workings of the enterprise you're at, so you should be able to deal with a good proportion of the calls that come in. Of course, be guided by your manager on when you should be answering the phone, what information you give out and what aspects of the business you should be talking about.

Answering the phone

The words each of us use when answering the phone might differ, but the approach will be the same. When answering the phone, always start by giving the name of the organisation, and offering assistance, so we could answer the phone something like this:

"Brighton & Hove Wood Recycling, how can I help you?"

If you can't help the caller, politely say that you will pass them over to whoever the best person is. You could try saying:

"Can I take your name please?" [...caller gives name, e.g. Mrs Jones]. *"I will just pass you over to John, Mrs Jones. Can you hold the line for a second?"*

If you need to ask/tell someone something whilst the caller is waiting, always cover the handset or press the mute button so that the caller can't hear your conversation.

If the person they need to speak to isn't available, then tell the caller that you will get that person to call them back. You could try:

"I am sorry Mrs. Jones; John isn't around at the moment. If you give me your number I will get him to call you back as soon as he returns."

You will develop your own style but the key to a good telephone manner is being **polite, honest**, and **offering a solution**. This could be finding the required information and calling them back, getting someone else to call them back or giving the caller an alternative—for example, telling them about another item that could be used if what they want is not in stock.

Telephone 'don'ts'

- Never be rude (even if the caller seems to be).
- Don't make jokes to people you don't know well.
- Don't keep callers waiting for more than a few seconds before talking to them again—even if just to say "sorry to keep you".

- Don't mumble.
- Don't pass responsibility or blame (never say *"it's not my fault"* or *"well, we're busy"*).
- Don't be aggressive.
- Don't be vague.

People will call the enterprise you are working in for a variety of reasons but—even in the internet age— two of the most common are:

- Asking for **opening times**
- Wanting to know exactly **where the enterprise is** and/or **how to get there**.

Other common enquiries from callers will include:

- Checking whether **we sell**/have **in stock** what they are looking for
- Enquiring about **prices**
- Wanting information about the **collection service**
- Checking on the **progress of an order**

You will need to find out the correct way to deal with these enquiries from your Trainer. In Section 3 you will be asked to deal with these queries.

Section 2—The computer

The vast majority of what is done on computers can be broken down in to five functions:

- Emailing
- Internet searching
- Completing online forms and writing general information, such as price lists, flyers and brochures
- Keeping accounts—most bookkeeping systems are now cloud-based
- Collating and analysing data

Although there are lots of companies making different (including free 'open source') software, most computers come ready loaded with Microsoft software to carry out these basic tasks. As they are so popular, we'll expect you to be trained on them.

Email

It is the easy and almost instant way of communicating with people. Most of us use Microsoft Outlook software or Gmail. Not only can you write to people, you can also send all sorts of documents along as attachments. Along with the phone, emailing is the most useful way that enterprises communicate with suppliers and customers.

Like post, emails are often intended for an individual, even if they are sent to a common address. Ask what emails you should deal with and which you should just leave. If you open an email that is intended for someone else, inform them so they can deal with it.

Web browsing

Surfing the internet is usually done with Google as the search engine (90% of all searches are done by Google). But Google is accessed by your browser software—which is usually Google Chrome, Firefox or Microsoft internet Explorer (now called Edge).

The browser software has useful features such as being able to open several websites at once and saving useful sites to your ‘favourites’. These days we browse the web for a phone number than use a paper directory like *Yellow Pages*. We also search the internet for goods and services, to learn about what our competitors are doing and for general fact gathering—information that not so long ago, might involve a visit to the library.

Writing text

The software Microsoft Word (part of Microsoft’s Office package) is a versatile and easy to use way of writing letters and creating lots other documents. In fact, it is by far the most popular way for most of us to produce brochures, flyers, handouts, price lists and reports. It is extremely versatile and easy to use. The Microsoft Office package also includes Publisher, an even better way of designing documents.

Data management

Excel is another part of Microsoft’s Office package and is an amazing tool for collating and analysing things that have a number of ‘variables’ such as customer records, sales figures or collections from builders. It is perfect for statistics and can produce pie and bar charts.

Accounts

Microsoft Excel used to be a popular way of keeping income and expenditure records and even preparing simple accounts. The programme can manipulate columns of figures, automatically adding or subtracting to produce month by month budgets and cash flow forecasts. Although taken over by cloud-based accounts packages, Excel is still mightily useful for doing budgets/cash flow forecasts.

Computer file management

This term computer file management refers to the way documents and files are stored on a computer—a bit like having cardboard folders and filing cabinets. So when you create a new document file or folder, or edit an existing one, you’ll need to save it somewhere; hopefully in a place that other users will feel is logical and therefore east to find.

Section 3—Trainee exercises and questions

There are some exercises for you to complete on the following pages.

Remember: don’t hesitate to ask for help from your Trainer, Supervisor, or any other member of staff.

Module 9: Exercise 1

Read the telephone checklist below and familiarize yourself with the correct way to deal with each enquiry. Your Trainer will work with you to find out how your enterprise's system is set up to deal with each point. Ensure that you always give the caller clear and polite answers.

- Asking for opening times
- Wanting to know exactly where the enterprise is and/or how to get there
- Checking whether we sell/have in stock what they are looking for
- Enquiring about prices
- Wanting information about the collection service
- Checking on the progress of an order

Office use only					
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Trainer's signature:					

Module 9: Exercise 2

Using different computer programmes

a. Send and receive an email: send an email with an attachment (such as a Microsoft Word document) and receive an email with an attachment and file the attachment to the right place (ask your trainer) on the computer you're using.

b. Connect to and browse the internet: search for some other community wood recycling enterprises and save some of their websites to the 'favourites' section of the web browsing programme you are using.

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c. Create a document in Word: make sure you create something in Microsoft Word (or a similar programme) from scratch. You could try to produce a CV for yourself if you don't already have one. Get used to changing the typeface (font) style (try using bold and italics), size and line-spacing. Use a different typeface and try using different colours. Try inserting a table. Then file it in the right place.

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d. Excel skills: either browse an existing Excel database with your Trainer and learn how to add to and amend some information it contains, **or** using the 10 names and addresses below, create your own database. Then produce a pie/bar chart of any variable from the database you have practiced on or from the one you have created. The chart could highlight the different postcodes, titles, gender or profession of those on the list.

Mr B Brown, Director, J Brown & Co, Builders,
123 High Street, Anytown, AN2 1PP

Mr J Smith, Director, Smith & sons, Builders,
12 Town Road, Anytown, AN1 2WE

Mr P Jones, Manager, Allbuild Ltd, Builders,
34 Wood Place, Anytown, AN1 5RT

Mrs I Rich, Director, CR Design and Build, Construction,
65 High Street, Anytown, AN2 6TG

Mrs D Lees, Manager, Bodgit & Co, Carpenters,
78 Ivy Road, Anytown, AN1 7YT

Mr G Plate, Director, Plate & Co, Construction,
21 New Road, Anytown, AN2 9UI

Mrs H Lung, Director, Lung Ltd, Builders,
46 Castle Road, Anytown, AN2 7PZ

Mr C Spade, Manger, Woodmen Ltd, Carpenters,
56 North Ave, Anytown, AN2 5TD

Mr B Stubb, Manager, Build-it & Sons, Construction,
45 Hay Place, Anytown, AN1 3BB

Mrs T Healey, Director, Healey Bros, Builders,
78 Crow Street, Anytown, AN1 3WE

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e. More Excel skills: using Excel, together with your Trainer, make a monthly budget of income and expenditure for a fictional household over 6 months using the information below.

Income (all per month): Wages = £1200 (months 1 to 3)

then £1300 (months 4 to 6)

Child Benefit = £80

Working tax credits = 120

Expenditure (all per month): Rent = £560

Council tax = £60

Utilities (gas, electricity, water) = £110

Food/household = £400

Broadband = 12

Other = £90

Make sure each column is added or subtracted automatically (and is correct) and that a monthly 'surplus' or 'deficit' figure is produced at the bottom.

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