HeadUp

Secretarial Studies

IN COMPLIANCE WITH THE NEW *Program of Study*

COORDINATING MULTIPLE TASKS

24

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SOFAD

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INTRODUCTION

The competency *Coordinating Multiple Tasks* is part of the program of study for a DVS (diploma of vocational studies) in Secretarial Studies. The program is divided into 25 competencies representing a total of 1485 hours of training.

Code	Number	Competency	Duration (h)	Credits
960-501	01	The Occupation and the Training Process	15	1
960-515	02	Proofreading	75	5
960-526	03	Word Processing	90	6
960-534	04	Quality of Written English	60	4
960-544	05	Customer Service	60	4
960-554	06	Document Management	60	4
960-562	07	Producing Spreadsheets	30	2
960-572	08	Designing Presentations	30	2
960-584	09	Business Texts in English	60	4
960-596	10	Accounting Operations	90	6
960-605	11	Business Correspondence	75	5
960-613	12	Creating Databases	45	3
960-623	13	Handling Cash	45	3
960-635	14	Translation	75	5
960-644	15	Producing Tables and Charts	60	4
960-656	16	Visual Design of Documents	90	6
960-666	17	Business Texts in French	90	6
960-672	18	Digital Media	30	2
960-833	19	Interacting in French	45	3
960-695	20	Following Up on Business Correspondence	75	5
960-704	21	Meetings and Events	60	4
960-714	22	Producing Reports	60	4
960-722	23	Technical Support	30	2
960-733	**24**	**Coordinating Multiple Tasks**	**45**	**3**
960-746	25	Entering the Workforce	90	6

One credit corresponds to 15 hours of training.

PRESENTATION OF THE LEARNING GUIDE

The general competency *Coordinating Multiple Tasks* is one of the 25 competencies covered in the Secretarial Studies vocational program. The educational aims of the program are to maintain and promote the quality of English, improve the quality of customer service, develop learners' desire to improve their knowledge of technological tools, and develop their sense of autonomy and initiative.

Secretaries today are trained to work independently yet play an integral role in any management team. They are indispensable assistants to managers and professionals, handling a variety of files and assuming multiple responsibilities. The competencies required to meet the needs of modern organizations are numerous and increasingly varied.

This learning guide will help you develop your competencies in coordinating multiple tasks. You will learn, among other things, how to produce a work schedule to plan the performance of your tasks and to use Microsoft Word software functions that will help you increase the efficiency of your work.

This guide is a tool for developing your ability to plan your tasks in order to maximize your performance and the efficiency of your work. You will coordinate the execution of several tasks in a simulated context where you will play the role of a secretary. You will receive several requests, such as producing PowerPoint presentations, advertising posters, a newsletter, reports, as well as writing résumés, forms and letter templates, procedures, agendas, and minutes. You will also be required to perform a mail merge and format various documents using databases. You will perform these tasks in a limited time and according to priorities.

WORK SITUATIONS

This guide consists of three work situations (WS) that will not only lead you to acquire new knowledge but teach you to apply it with ease and use it skillfully. Each situation follows the same structure. First, you read about the work context and the assignment you must carry out. Next, you embark on a series of engaging and motivating tasks. Each task is presented in a dynamic and motivating way. You will be guided step by step through each task. The ideas, techniques, rules and concepts will be explained in detail and supported with multiple exercises to ensure that you acquire this new learning. All the answers to the exercises are in the answer key, at the end of the guide.

EVALUATION OF LEARNING

This guide includes two scored activities, presented in separate booklets that have been provided with the guide. You can also download them from the **portailsofad.com** website. You will find all the information you need in your guide when you reach the appropriate stage for evaluation.

Scored activities must be submitted for correction and grading. You will hand them in to your teacher if you are taking the course in an education centre, or you will send them to your tutor if you are registered for distance learning. In either case, the corrected document will be returned to you.

Scored activities are an excellent way for you to identify areas of difficulty so that you can work to overcome them. The last scored activity in the guide was developed following the same criteria as those of the final evaluation for the course. It therefore serves as a realistic practice test for the official final examination, which will take place under supervision in an adult education centre.

REQUIRED MATERIALS

The materials for this course include the following:

- the learning guide and answer key
- two scored activities
- access to the **portailsofad.com** website
- documents pertaining to Situations 1, 2 and 3 (available on the **portailsofad.com** website)

RECOMMENDATIONS FOR SUCCESS

We recommend that you do all the exercises in the learning guide as well as the two scored activities provided. Carefully compare your answers with the answer key and, if necessary, review content to make sure you fully understand it before going on to the next task.

If you have questions, do not hesitate to ask your teacher or tutor for explanations.

The course is estimated to take approximately 45 hours to complete. Set up a study schedule that takes into account your needs as well as your obligations: family, work or other responsibilities. Follow the schedule you have set as closely as possible.

OVERVIEW OF THE LEARNING GUIDE

Opening Pages

The title page presents the number and title of the work situation.

1

Planning Tasks

The situation begins with a description of the context in which you will complete different tasks to acquire the target competency.

The Your Assignment section summarizes and lists the tasks you will perform during the work situation.

Planning Tasks

TOTAL DURATION 12 h

1

For the past three years, you have been a secretary at Groupe RHE, which specializes in human resources management. Its mandate is to provide human resources support to small and medium companies. This consulting firm also oversees a number of staff reclassification cases — that is, when a company closes its doors, a committee is set up to offer assistance to workers who have lost their jobs, and Groupe RHE is part of this committee. There are two major reclassification projects under way.

Groupe RHE is composed of eight human resources advisors who handle external mandates, including the establishment of human resources policies, the mobilization of staff, the implementation of hiring processes and the creation of training manuals. In addition, two guidance counsellors are dedicated to the reclassification committees, a graphic designer develops marketing and social networks with your help and the help of freelancers for writing and correcting texts. To complete this team, an accountant ensures

the financial management of the group. Finally, Robert and Sophie, the two bosses, are responsible for finding mandates, planning and distributing all the tasks, negotiating with the different parties, recruiting internally, in short, the complete management of the company.

Your job is to greet clients, answer the phone, manage the general email inbox and calendars of your two bosses, prepare and send a monthly newsletter to the reclassification committees, meet with clients and write their résumés, and enter and correct text for the creation of various documents. You are sometimes given some additional tasks. Deadlines are usually tight and priorities vary depending on the work you are asked to do.

To achieve your goals, you must learn to do more in less time, without neglecting the details. You need to develop automatic reflexes that will help you process requests quickly to become even more efficient.

Your Assignment

You must perform several tasks simultaneously in the time allotted, while respecting the requests and the directives formulated according to the procedures, standards, policies and quality requirements in force at Groupe RHE. In addition, you must perform these tasks in collaboration with your colleagues, your bosses, clients and suppliers.

Your assignment consists of:

1. analyzing the request and collecting relevant information
2. recognizing the importance of a work plan
3. producing a work schedule
4. planning and performing tasks

The total length of all the situation tasks includes the scored activity, if applicable.

Situation Highlights

TASK 1.1

Analyzing Requests and Collecting relevant Information

Every Friday afternoon, your bosses, Robert and Sophie, send you their requests for the following week. You must read the requests carefully, make sure you understand them properly and collect all the information you need to carry them out.

Analyzing a request means that you must understand the work to ~~and recognize the relevant elements. There are several~~ pany, and your bosses sometimes send ~~or for which information~~ functions the organi~~

The task number is clearly indicated.

TASK 1.4

Planning and Performing Tasks

The last task presents a situation that is similar to what can happen if you are the secretary of Groupe RHE. You will need to coordinate multiple tasks, make good planning, and execution decisions based on requests and instructions.

At 1 p.m., when you return from lunch, you have several tasks waiting for you. You will need to plan and perform them before you finish your usual day at 5 p.m.

11 Go to **portailsofad.com** and download the files listed under: documents/situation 1/question 11:

- *01_task_table*
- *02_notes_cv_sbisson*
- *03_instructions_ppt*

Make sure you save these files to your workstation so you can access them throughout the activity. Read the content of these files.

a) Read the requests and directives on the following page, then use the workbook (*01_task_table*) to fill in the table, prioritizing the tasks to be performed.

This pictogram indicates that you must download documents from **portailsofad.com**.

This pictogram tells you that you must use the Internet or a computer to complete the task.

In order to have clear ideas, planning is essential, but it is not the only important step. To be able to coordinate multiple tasks, it is important that you maintain your energy at a good level. There are physical factors that should not be overlooked, such as staying hydrated, eating well and exercising. There are free apps to remind you to drink water, others to do exercises at home without equipment, and others to give you meal ideas. Do not hesitate to do research to find the appropriate tools.

Now that you have seen the steps that Christine can take to better plan her personal activities, you can translate these learnings into the planning of your personal and professional activities.

7 Your bosses have asked you to show them your planning for the week.

Before doing your chart for work, you decide to do this exercise for your personal schedule.

Create a new Excel workbook that you will name *Time Use* (e.g. Time Use). Then follow each of the five steps (page 12) to produce...

Tip

Sorting the Data

...use of all Excel ...e sorting data ...isualize data ...cisions more

8 Now insert a new sheet to the workbook... this new worksheet "Work." Th...

Note: Allow a litt...

Not...

...sonal" and ...plan.

2 To the best of your knowledge, answer the following two questions.

a) Do all the requests listed in the table on the previous page concern Marie-Lou exclusively? Justify your answer. If necessary, read the page concerning the responsibilities of each employee (page 2).

_____

_____

_____

b) Does Marie-Lou have all the tools to do her job? Justify your answer.

_____

_____

_____

_____

Compare your answers with the ANSWER KEY. ✓

A regularly repeated instruction points out the best time to compare your answers with the Answer Key (at the end of the guide).

Before starting a task, you should make sure you know the following:

- the person for whom the task is intended (for questions and delivery)
- the date on which you must submit it (due date)
- the responsibilities of each of the parties concerned (proofreading, layout, etc.)
- the criteria to respect, if applicable (colours, fonts, line spacing, etc.)

Here is the list of tasks you must perform as secretary for Groupe RHE.

After their weekly meeting on Friday morning, Robert and Sophie give you their requests for the following week.

- Greet clients.
- Answer the phone.
- Manage the company's inbox.
- Manage the agendas of your two bosses.
- Prepare and send a monthly newsletter.
- Meet with clients and write their résumés.
- Enter and proofread text.
- Perform any other requested task.

1 Planning Tasks **7**

3. SORT THE LIST OF TASKS TO BE DONE PER DAY (D), PER WEEK (W) AND PER MONTH (M)

This step consists in determining task frequency: once a day, once a week and once a month (you could add "per year"—Y—, as needed).

You must then rank the list in order of frequency (D, W, M).

TASKS TO COMPLETE	EXPECTED DURATION (in hours)	D, W, M
Do and fold laundry (1 load per day)		
Organize clothes		
Put toys away	0.5	
Make meals	0.5	D
Study and do homework	0.5	D
Go to school (including lunch)	1.5	D
Travel time	0.5	D
Sleep		D
Eat		D
Take a shower		D
		D
		D
		D
		D

Content is often presented in tables to make it easier to understand.

In order to have clear ideas, planning is essential, but it is not the only important step. To be able to coordinate multiple tasks, it is important that you maintain your energy at a good level. There are physical factors that should not be overlooked, such as staying hydrated, eating well and exercising. There are free apps to remind you to drink water, others to do exercises at home without equipment, and others to give you meal ideas. Do not hesitate to do research to find the appropriate tools.

Now that you have seen the steps that Christine can take to better plan her personal activities, you can translate these learnings into the planning of your personal and professional activities.

🖥 ⑦ Your bosses have asked you to show them your planning for the week. Before doing your chart for work, you decide to do this exercise for your personal schedule.

Create a new Excel workbook that you will name *Time Use* (e.g. Time_Use). Then follow each of the five steps (page 12) to produce the plan. Then rename worksheet number 7 "Personal" and

🖥 ⑧ Now insert a new sheet to the workbook *Time Use*. First, rename worksheet "Work." Then follow each of the five steps (page 12) to produce the work plan. Allow a little more time for each task as you may be interrupted.

Note: Allow a little more time for each task as you may be interrupted.

Note the following information:

- You work 40 hours a week.
- You greet an average of five visitors per day; you spend about five minutes with each one.
- You answer about 20 calls a day, which last on average 2 minutes each.
- You manage emails twice a day; you spend about 30 minutes each time.
- You work from 8 a.m. to 5 p.m. Monday to Friday and have an hour for lunch.
- You must allow about 30 minutes a day for the unexpected.
- You spend about 30 minutes each day to manage your agenda and that of your bosses, and 3 hours on Friday afternoon to plan their next week and yours.
- You have 7 hours to create the Esthetician's Guide.
- You have 3 hours to produce the newsletter.
- You have 2 hours to complete the PowerPoint presentation.
- Rescheduling your bosses' appointments takes about 25 minutes.

Tip ✓

Sorting the Data

Make full use of all Excel features like sorting data to quickly visualize data and make decisions more efficiently.

The **Tip** feature presents practical advice to help you do an exercise.

→

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WORK TO COMPLETE	DEADLINE
1. Meet two clients a day for the Aubin mine reclassification committee to write their résumés.	Friday 4:30 p.m.
2. Reschedule all our appointments on Thursday and Friday because we will be in a meeting with the Woods plant reclassification committee.	Monday 4 p.m.
3. Prepare the next monthly newsletter.	Wednesday 10 a.m.
4. Enter, correct and lay out the text of the training guide (approximately 15 pages) for the new estheticians of Clinique Beauté.	Thursday 4 p.m.
5. Prepare a PowerPoint document for an advisor presentation on Thursday. You can use a theme provided by the software; this way, no layout will be necessary.	Tuesday 4:30 p.m.

3 **a)** Do all these requests concern you? Justify your answer.

b) Write down the information you need to do your job properly.

>> Compare your answers with the ANSWER KEY. ✓

The **Ergo** feature offers suggestions of good posture and working positions to adopt at your desk and elsewhere in the workplace.

Ergo
Layout of Your Workstation
The proper layout of your workstation is essential in order to be effective. Not only is the position of your chair and keyboard extremely important as a way to avoid injuries and ensure comfort, but everything placed on your desk will also affect your efficiency. A cluttered desk can prevent you from fully concentrating, leading you to feel overwhelmed.

If you know what tasks you need to do and you have all the information to perform them, you can now proceed to the planning stage.

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>> Compare your answers with the ANSWER KEY. ✓

Scored Activity 1
👁 **You must now complete Scored Activity 1.**

Go to the SOFAD website at **portailsofad.com** and download the document entitled *Scored Activity 1*. Once completed, return it to your instructor or your tutor according to the instructions given at registration.

At the end of Situations 2 and 3, this pictogram tells you to complete a scored activity.

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COORDINATING MULTIPLE TASKS

A LEARNING GUIDE FROM THE COLLECTION

Head Up
Secretarial Studies

With the Head Up learning guides, students acquire competency through authentic work situations so that they are ready to deal with the demands and needs of the labour market.

The **Coordinating Multiple Tasks** learning guide is fully compliant with the vocational programs in secretarial studies (DVS 5357) in the training sector of administration, commerce and computer technology.

As students perform the assigned tasks, they acquire elements of the competency *Coordinating Multiple Tasks*:

- planning tasks
- ensuring efficiency and quality of work
- tracking the completion of tasks

The *Coordinating Multiple Tasks* learning guide consists of three work situations:

1. Planning Tasks
2. Ensuring Efficiency and Quality of Work
3. Tracking the Completion of Tasks

Discover our new Head Up series: stimulating learning resources for contextualized training that promotes success both at school and in the workplace.

The learning guide and the answer key (PDF), as well as complementary digital resources, are available online at **portailsofad.com**.