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Management & Entrepreneurship
and Professional Skills Council

Facilitator Guide

Sector
Management, Entrepreneurship
and Professional Skills

Sub-Sector
Office Management & Professional Skills

Occupation
Office Support

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Office Operations Executive

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> **"** Skilling is building a better India.
> If we have to move India towards
> development then Skill Development
> should be our mission. **"**

Shri Narendra Modi
Prime Minister of India

About this Guide

This Facilitator Guide is designed for providing skill training and /or upgrading the knowledge level of the Trainees to take up the job of an "Office Operations Executive" in the Management and Entrepreneurship Sector.

This Facilitator Guide is designed based on the Qualification Pack (QP) under the National Skill Qualification framework (NSQF) and it comprises of the following National Occupational Standards (NOS)/topics and additional topics.

1. MEP/N0204: Managing routine office activities
2. MEP/N0216: Use computers to store, retrieve and communicate information
3. MEP/N0224: Check forms and applications for completeness as per norms
4. MEP/N0225: Co-ordinate with internal and external agencies to complete operational requirements
5. MEP/N9903: Apply health and safety practices at the workplace
6. MEP/N9912: Apply principles of professional practice at the workplace
7. MEP/N9914: Communicate with clients, visitors and colleagues effectively
8. DGT/VSQ/N0102: Employability Skills

Symbols Used

Ask	Explain	Elaborate	Notes	Objectives	Do
Demonstrate	Activity	Team Activity	Facilitation Notes	Practical	Say
Resources	Example	Summary	Role Play	Learning Outcomes	Exercise

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1. Introduction to the Training Program

Unit 1.1 - Types of Organizations and Their Purpose

Unit 1.2 - Structure of an Organization and Administration Orientation

Unit 1.3 - Office Management

Unit 1.4 - Job Responsibilities of an Office Operations Executive

Key Learning Outcomes

By the end of this module, the trainees will be able to:

1. Describe the various types of organizations and their purpose
2. Explain the organizational structure and related functions
3. Describe an organization's departments and hierarchy
4. Describe the importance of office management
5. Describe the job responsibilities of an office operations executive
6. Explain the common policies and procedures followed in organizations

Unit 1.1: Types of Organizations and Their Purpose

Unit Objectives

By the end of this unit, the trainees will be able to:

1. Interpret the meaning of an 'Office'
2. Identify the importance of an 'Office'

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

This is the first session of the program. Talk about the Office industry in India briefly and welcome the participants.

• Please ensure that while introducing yourself, you share at least one personal information such as your hobbies
• Take an active interest in the needs and aspirations of the participants before beginning

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

• Start by welcoming all the participants to the training program and conveying a message of encouragement.
• Thank all the participants for joining and being a part of this training program
• Introduce yourself briefly to participants, your name and background, and your role in the training program
• Explain the rules of the game

Ask

Ask the participants the following question:

• What is the meaning of an office?
• What stands to be the importance of an office?

Elaborate

In this session, discuss the following points:

- Meaning of an Office
- Importance of an office

Say

Before we begin training, let us spend some time getting to know the importance of an office.

Activity

Chart making

1. **Objective of the Activity:** To understand the different types of organization along with their purposes
2. **Materials required:** Participant handbook. pen, chart paper, pencil, sketch pens, etc.
3. **Steps required:**
- The students need to research regarding the different types of organizations
- Then they are required to jot them down in a chart paper in a systematic manner along with their purposes
- After completion, each student needs to come one by one in front of the class and explain their chart work.
- The trainer needs to assess the chart made by the student as well as their explanation and mark them accordingly.
4. **Conclusion drawn:** The activity helps in understanding the different types of organization along with their purposes.

Say

Did you all enjoy this activity? The purpose was to make the students understand the different types of organization along with their purposes.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 1.2: Structure of an Organization and Administration Orientation

Unit Objectives

By the end of this unit, the participants will be able to:

1. Describe the major functions of an office in business activities
2. Explain the operations of the major functional areas/departments in an organisation
3. Illustrate the organisational structure of an organisation

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools

Note

In this unit, we will be discussing regarding the structure of an organization and also talk about the administration orientation.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive"

Do

- Start by greeting all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this session of training
- Make the concept illustrative while the session and also try and make it interesting

Ask

Ask the participants the following question:

- What are the functions of an office?
- What are the different departments in a typical office involving their functions?

Elaborate

Ask the participants the following question:

- Functions of an office
- Departments in a typical office and their functions
- Organizational structure

Say

Good morning and welcome back to the program "Office Operations Executive"." Today, we shall learn about the structure of an organization and the administrative orientation.

We will play a game where we learn how to research about the organizational structure of the institution, we are in.

Activity

Determine the organizational structure

1. **Objective of the Activity:** To identify the organizational structure
2. **Materials required:** Participant handbook, pen, paper, etc.
3. **Steps required:**
   - List different projects the organization is running
   - Tell the participants about the project heads and whom they report.
   - Also, learn about their downlines Help them formulate the reporting structure and make a hierarchy diagram of the organization
4. **Conclusion drawn:** The activity helps in determining the organizational structure.

Say

Did you like the activity? The purpose was to get to know about the organizational structure of the institution we are in.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 1.3: Office Management

Unit Objectives

By the end of this unit, the trainees will be able to:

1. Explain the term office management
2. Identify the importance of office management for smooth flow of work

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In this unit, we will be acquiring knowledge on the concept of office management.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following question:

- What appears to be the importance of office management?

Elaborate

In this session, discuss the following points:

- Office management
- Importance of office management

Say

Good morning and welcome back to the program "Office Operations Executive".

Today, we will learn about the importance of office management.

Activity

Industry Expert session

1. **Objective of the Activity:** To understand the concept of Training Organisation System and Organizational Record Management System.
2. **Materials (if required):** Computer, notebook, pen, marker, participant handbook, etc.
3. **Steps required:**
   • Organise an interactive session
   • A training coordinator will brief the students on the Training Organisation System and Organizational Record Management System.
   • Encourage the students to ask questions and make important notes
4. **Conclusion drawn:** This activity helps in understanding the concept of Training Organisation System and Organizational Record Management System.

Say

Did you enjoy the activity? It was to understand the functions that are required to regulate the office by an Office Operations Executive.

Notes for Facilitation

• Answer all the queries/ doubts raised by the participants in class
• Encourage other participants to answer problems

Unit 1.4: Job Responsibilities of an Office Operations Executive

Unit Objectives

By the end of this unit, the trainees will be able to:

1. Analyse the prerequisites of the job of an Office Operations Executive
2. Describe the importance of the Office Operations Executive's role in the organization
3. Discuss the required skills and the career progression for the role of Office Operations Executive

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In this specific unit, we will be tending to understand the job responsibilities of an office operations executive.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive"

Do

- Start by greeting every participant to the training program and conveying a message of motivation.
- Thank all the participants for joining the particular session, and being a part of this training program

Ask

Ask the participants the following question:

- What stands to be the importance of the office operations executive's role in an organization?
- What are the skills required for the role of office operations executive?

Elaborate

In this session, discuss the following points:

- Prerequisites of the job of an office operation executive
- The importance of the office operations executive's role in an organization
- Skills required for the role of office operations executive

Say

Good morning and welcome back to the program "Office Operations Executive" Today, we will understand the job responsibilities of an office operations executive.

Activity

Identifying the responsibilities of an Office Operations Executive

1. **Objective of the Activity:** To identity the responsibilities of an Office Operations Executive.
2. **Materials (if required):** Participant handbook, notebook, pen, etc.
3. **Steps required:**
   - Arrange the class in a semi-circle
   - Start calling out the responsibilities (easy ones) of an Office Operations Executive
   - One by one, observe which participant moves forward when the right roles are being called out
   - Also, notice the ones who take a step forward when the wrong role is called out
   - Clarify doubts that any students may have
4. **Conclusion:** This activity helps in understanding the responsibilities played by an Office Operations Executive.

Say

Did you all enjoy this activity? The purpose was to get acquainted with some of the basic roles of an Office Operations Executive, which will help us better understand the main roles in our session.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Answers to the Exercise Questions

Answer the following questions by choosing the correct option:

1. a. customer
2. b. data bank
3. a. organisational structure
4. a. fundamental skills
5. d. all of the given options

Answer the following questions briefly.

2.

    i. Anil Kumar Pokhriyal

    ii. Manish Kumar

    iii. Admin Department is important to any company because it works across all departments and with all kinds of work. The functions of the Admin Department include:

        • General Office Management

        • Asset Management

        • Transport Management

        • Security and Safety Management

2. Check Forms and Applications for Completeness as per Norms

Unit 2.1 - Types of Form

Unit 2.2 - Pre-set Forms and Templates for Data Entry

Unit 2.3 - Data Entry Errors

Unit 2.4 - Guidelines for Checking Forms and Applications for Completeness
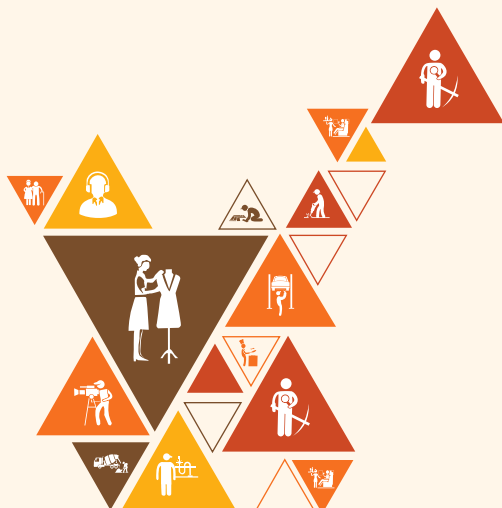
MEP/N0224

Key Learning Outcomes

By the end of this module, the participants will be able to:

1. State the various types of forms, applications and files that may need to be checked in an organization
2. Identify applicable norms and guidelines for checking the forms or applications
3. Undertake agreed procedural action when applications are unacceptable
4. Explain the measures that can be taken to protect physical and digital documents from damage or loss
5. Explain the importance of Information security and safety measures that can be taken to protect documents and the information they contain from unauthorized access
6. Operate and use a standard alphanumeric keyboard.
7. Apply procedures for coding, entering, storing, retrieving and communicating data manually and using a computer
8. Verify correctness and completeness of all the data entered and adherence to instructions
9. Ensure entries are made in a legible and presentable format
10. Explain the various parameters on which forms and applications may require checking
11. Ensure approval from authorized person is taken for first few completed checks
12. Undertake agreed procedural action when applications are unacceptable
13. Handover the documents after checking and marking for further processing to the authorized personnel as per instructions
14. Explain the measures that can be taken to protect documents from damage
15. Maintain workplace confidentiality standards

Unit 2.1: Types of Form

Unit Objectives

By the end of this unit, the participants will be able to:

1. Identify office forms and discuss its advantage
2. Distinguish between various types of forms
3. Identify different fields in a form
4. Ensure that correct entries are filled in a given form

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

This unit shall mainly stand to focus on the different types of form. Having a knowledge on this particular topic would act to be a major aspect for the role of an Office Operations Executive.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following question:

- What are the different types of office forms?
- What do you understand by digital and physical form?

Elaborate

In this session, discuss the following points:

- Forms
- Types of office forms
- Fields in a digital form
- Fields in a physical form

Say

Good morning and welcome back to the program "Office Operations Executive". Today, we will learn about types of forms. We shall play a game to better understand it.

Activity

Group Activity

1. **Objective of the Activity:** To understand the different types of office forms
2. **Materials required:** Participant handbook, pen, notebook, etc.
3. **Steps required:**
   - Divide the class in two sections
   - One group should be assigned to discuss about the features of a digital form and the other group about the physical form.
   - One student representing each group should come up after the discussion and explain the outcome that they had.
   - The trainer should be marking the students accordingly as per the appropriateness in their illustration.
- **Conclusion drawn:** The activity helps in understanding the types of forms.

Say

Did you enjoy the game? It was to understand the types of forms.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
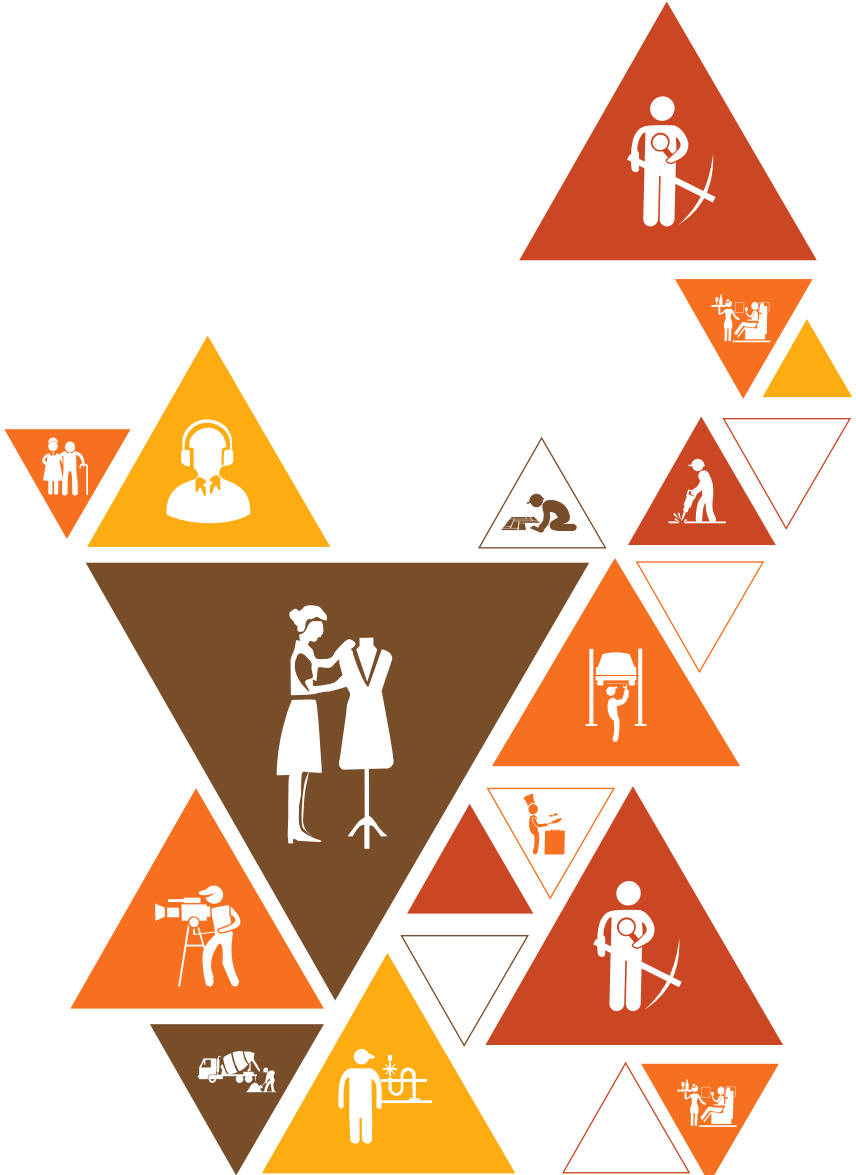- Encourage other participants to answer problems

Unit 2.2: Pre-set Forms and Templates for Data Entry

Unit Objectives

By the end of this unit, the participants will be able to:

1. Identify the task to enter data in pre-set forms and template
2. Identify the guidelines to enter and save data

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In this particular unit it can be seen that the discussion would be based on the pre-set forms and templates for data entry, which appears to be an important factor that an Office Operations Executive requires to have the knowledge of.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for participating in the session and being a part of this training class.

Ask

Ask the participants the following question:

- What is the procedure of checking the forms and applications?
- What stands to be the significance of the pre-set forms and templates for data entry?

Elaborate

In this session, discuss the following points:

- Understanding the task
- Check forms and applications
- Significance of pre-set forms and templates for data entry

Say

Good morning and welcome back to the program "Office Operations Executive".

Today, we will learn about the pre-set forms and templates for data entry. We will be doing an activity on it.

Activity

Chart Making

1. **Objective of the Activity:** To understand the structure of the pre-set forms and templates for data entry.
2. **Materials required:** Participant handbook, pencil, sketch pens, pen, chart paper, etc.
3. **Steps required:**
   - The students require to prepare the structure of a pre-set form and a template which is used for the purpose of data entry.
   - After completion they need to come up one by one and present their chart work in front of the class.
   - The trainer needs to mark the students as per their chart work presentation.
4. **Conclusion drawn:** The activity helps in understanding the structure of the pre-set forms and templates for data entry.

Say

Did you enjoy the activity? It was to understand structure of the pre-set forms and templates for data entry.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 2.3: Data Entry Errors

Unit Objectives

By the end of this unit, the participants will be able to:

1. Explain the types of data entry errors
2. Identify the possible errors in the data entry fields

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In this particular unit, the errors which tend to occur in data entry would be discussed.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by greeting all the participants to the training session and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following question:

- What are the errors that tend to occur in the fields of data entry?
- What are the tips to reduce common data entry errors?

Elaborate

In this session, discuss the following points:

- Types of data entry errors
- Errors in data entry fields
- Tips to reduce common data entry errors

Say 💬

Good morning and welcome back to the program "Office Operations Executive". Today, we will learn about the data entry errors. We will see a presentation to better understand it.

Activity ⚙

PowerPoint Presentation

1. **Objective of the Activity:** To understand the various types of data entry errors
2. **Materials required:** Participant handbook, projector, screen, laptop, notebook, pen, etc.
3. **Steps required:**
   - The trainer requires to show a presentation to the students based on the various types of data entry errors
   - The students need to identify the main points and take running notes in their notebooks
   - After the video, the trainer needs to hold a question answer round for the students based on the video shown to them
   - The trainer requires to mark the students accordingly.
4. **Conclusion:** The activity helps in understanding the various types of data entry errors.

Say 💬

Did you like the presentation? It was to understand the various types of data entry errors.

Notes for Facilitation 📝

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 2.4: Guidelines for Checking Forms and Applications for Completeness

Unit Objectives

By the end of this unit, the participants will be able to:

1. Explain the guidelines to follow while working with forms and applications

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In this specific unit the guidelines for checking forms and applications for completeness would be discussed and kept the focus on.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive"

Do

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following question:

- What are the important guidelines which are required to be followed?
- What are the ways to protect the official documents?

Elaborate

Ask the participants the following question:

- Important guidelines to follow
- The ways to protect the official documents

Say

Good morning and welcome back to the program "Office Operations Executive".

Today, we will learn about the guidelines for checking forms and applications for completeness. We will be conducting a class activity to better understand this topic.

Activity

Chart Making

1. **Objective of the Activity:** To understand the guidelines for checking forms and applications.
2. **Materials required:** Participant handbook, chart paper, pen, pencil, markers, etc.
3. **Steps required:**
   - The students are required to be divided in groups of 5
   - They need to make a chart providing a list on the guidelines for checking forms and applications
   - After completion each group need to bring their chart in front of the class and explain it.
   - The trainer then needs to make them accordingly based on their presentation as well as explanation.
- **Conclusion drawn:** The activity helps in understanding the guidelines for checking forms and applications for completeness.

Say

Did you like the activity? It was to learn about the guidelines for checking forms and applications for completeness.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Answers to the Exercise Questions

Answer the following questions by choosing the correct option:

1. b. form
2. d. checklist
3. a. Radio button
4. b. Text box
5. d. None of the given options
6. a. Aadhaar Card or Ration Card
7. a. Put in the desired format
8. b. mm/dd/yyyy

Answer the following questions briefly.

1. The difference between optional and mandatory fields in a form/application are as follows:
   - **Optional fields:** Many apps use optional fields as an opportunity to gain knowledge about the user for research purposes. They treat it like a survey form and ask them a lot of prying questions. Users don't get any benefit, and it causes them to skip those fields. A sign-up or registration form isn't the place to survey your users.
   - **Mandatory fields:** Many forms have fields that must be filled in by the user. One of the advantages of using mobile forms over paper or spreadsheets is that you can prevent the user from submitting the form until all of the mandatory information has been filled in.

2. Checklists have the objective of overseeing tasks or projects and ensuring nothing important is forgotten during execution. This way, you don't omit anything that might end up compromising your results. Additionally, they ensure activities are completed in orderly, organized fashion.

3. The ways by which the official documents can be protected are as follows:
   - **Store documents of similar security levels together:** It's critical to use a classification system that makes sense today and tomorrow when developing a digital file system to store your sensitive papers. In other words, documents with similar levels of sensitivity should all be stored in the same location on your local or cloud infrastructure. There are two effects. To begin with, you always know where to go for specific types of documents. Second, rather than classifying each document separately, you can standardize the sorts of security you apply to them based on their overall security level.
   - **Prefer group permissions over individual access:** Controlling access to secret material is critical; not everyone in a law firm has the authority or permission to read certain papers. Access control systems, such as Microsoft's Active Directory Rights Management Services, are useful for determining which files are available to which users. Leaving protected documents in unsecured locations on your computer networks or in the cloud increases the chance of a leak from within your company as well as an event caused by an outside invader. It is, at the very least, an unacceptable risk.
   - **Use software that enables secure document management:** It's difficult to overestimate the importance of software that puts security features at your fingertips. Law firms are increasingly working in a paperless world, necessitating low-cost programmes that make safe document management simple. The correct tools make all the difference, whether it's redacting information before giving over discovery materials, affixing a certifiable signature, or encrypting data entirely.

- **Protect and encrypt your most sensitive files:** When it comes to encryption, it's best to keep your files locked down in general. An intern or clerk should not be able to open a file folder containing sensitive customer information and begin exploring and reading with a few mouse clicks. Password-based encryption is a simple technique to ensure that unauthorized access to information is prevented.

- **Safeguard against tampering with secure digital signatures:** Modern digital signatures use cryptographic certificates to provide irrefutable proof of who signed a document and when. The importance of document validity in the legal field cannot be overstated. Use tools with built-in anti-tampering features to ensure that your documents can withstand the rigorous inspection that legal documents face.

- **Keep safe backups:** Nothing is more damaging to a company than losing critical documents that cannot be replaced. Keeping your legal papers safe in the cloud eliminates the need for additional physical storage space, making it easier to ensure access today and in the future. Continue to use the principles indicated here, regardless of the backup solution you pick. Make logical backup folders for your files, and make sure your papers are password-protected and the backup is encrypted. You can exert finegrained control over permissions and security settings when your document management solution easily interacts with conventional cloud services like Microsoft Sharepoint.

3. Workplace Related Routine Texts and Correspondence

MEP/N0204

Key Learning Outcomes

By the end of this module, the participants will be able to:

1. Describe the various types of workplace texts and correspondence
2. Review a draft text to identify errors and scope for improvement for achieving accuracy 3
3. Revise and finalize text to achieve professional standards of written communication as per organization protocols
4. Explain business communication and basic numeracy
5. Demonstrate business writing skills
6. Describe writing strategies to complete routine formal workplace texts
7. Use drafting strategies to write formal text, efficiently
8. Explain grammar and vocabulary for routine formal workplace texts
9. Describe writing conventions for routine formal workplace texts
10. Review a draft text to identify errors and scope for improvement, to achieve better accuracy, and adherence to professional protocols for effective communication
11. Revise and finalize text to achieve professional standards of written communication as per organization protocols.
12. Write simple emails and letters using the right form of address and starting and ending correctly
13. Explain business letter writing principles
14. Make routine written enquiries, requests and invitations politely as per professional protocols
15. Write routine instructions or advice, accurately
16. Write accurately using correct grammar, familiar words and language structures to convey a professional impression on the reader.
17. Explain routine numerical terms in figures and word, including roman numerals

Unit 3.1: Office Correspondence

Unit Objectives

By the end of this unit, the participants will be able to:

1. Describe various types of workplace texts and correspondence
2. Describe the characteristics of workplace texts and correspondence

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In this unit, the various sorts of workplace texts and correspondence has been outlined. In addition to this, the characteristics of workplace texts and correspondence has also been discussed.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by greeting all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following question:

- What are the various types of office texts and correspondence?
- What stands to be the characteristics of office texts and correspondence?

Elaborate

In this session, discuss the following points:

- Various types of office texts and correspondence
- Characteristics of office texts and correspondence
- Purpose of office correspondence

Say

Good morning and welcome back to the program "Office Operations Executive".

Today, we will learn about the various sorts and characteristics of workplace texts and correspondence.

Activity

Group Discussion

1. **Objective of the Activity:** To understand the different types of organization along with their purposes
2. **Materials required:** Participant handbook. pen, chart paper, pencil, sketch pens, etc.
3. **Steps required:**
    - The students are required to be divided in three groups
    - The groups will be given topics and they need to discuss it amongst themselves:
        - Topic 1: Various types of office texts and correspondence
        - Topic 2: Characteristics of office texts and correspondence
        - Topic 3: Purpose of office correspondence
    - After completion, one student from each group need to come forward and put up the outcome they had from their discussion.
    - The trainer needs to mark them accordingly.
4. **Conclusion drawn:** The activity helps in understanding the different types of organization along with their purposes.

Say

Did you all enjoy this activity? The purpose was to make the students understand the different types of organization along with their purposes.

Activity

Group Discussion

1. **Objective of the Activity:** To understand the idea on office texts and correspondence.
2. **Materials (if required):** Participant handbook, notebook, pen, etc.
3. **Steps required:**
   - The students are required to be divided in three groups
   - The groups will be given topics and they need to discuss it amongst themselves:
     - Topic 1: Various types of office texts and correspondence
     - Topic 2: Characteristics of office texts and correspondence
     - Topic 3: Purpose of office correspondence
   - After completion, one student from each group need to come forward and put up the outcome they had from their discussion.
   - The trainer needs to mark them accordingly.
4. **Conclusion drawn:** The activity helps in understanding the idea on office texts and correspondence.

Say

Did you like the activity? It was to learn about the office texts and correspondence.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 3.2: Business Communication and Basic Numeracy

Unit Objectives 🎯

By the end of this unit, the participants will be able to:

1. Describe business communication
2. Explain methods of business communication
3. Use numeric skills to solve simple mathematical problems

Resources to be Used ⚙️

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note 📝

The unit tends to highlight the system of business communication and basic numeracy.

Say 💬

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do ✓

- Start by greeting all the participants to the training session and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask 💬

Ask the participants the following question:

- What do you understand by business communication?
- What are the methods of business communication?

Elaborate ⚙️

In this session, discuss the following points:

- Business communication
- Methods of business communication
- Basic numeracy

Say

Good morning and welcome back to the program "Office Operations Executive".

Today, we will learn about the system of business communication and basic numeracy.

Activity

PowerPoint Presentation

1. **Objective of the Activity:** To understand the methods of business communication.
2. **Materials required:** Participant handbook, projector, white screen, laptop, notebook, pen, etc.
3. **Steps required:**
- The students are required to prepare a PowerPoint presentation based on the methods of business communication.
- They are needed to play it in front of the class and explain it to them.
- Based on the presentation and explanation the trainer needs to mark the students.
4. **Conclusion drawn:** The activity helps in understanding the methods of business communication.

Say

Did you like the activity? It was to learn regarding the methods of business communication.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 3.3: Basic Writing Skills

Unit Objectives

By the end of this unit, the participants will be able to:

1. Identify basic writing strategies to complete routine formal workplace texts
2. Use writing strategies for effective writing

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In this unit, the basic writing skill for the job role of an Office Operations Executive has been discussed.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program
- Introduce yourself briefly to participants, your name and background, and your role in the training program
- Explain the rules of the game

Ask

Ask the participants the following question:

- What are the basic writing strategies?

Elaborate

In this session, discuss the following points:

- Writing strategies

Say

Good morning and welcome back to the program "Office Operations Executive".

Today, we will learn about the basic writing skills.

Activity

Individual Activity

1. **Objective of the Activity:** To understand the basic writing skills.
2. **Materials required:** Participant handbook, pen, notebook, etc.
3. **Steps required:**
   - Each student requires to write an article on the topic of the importance of Office Operations Executive in an office
   - After completion the students need to come one by one and read out their article in front of the class.
   - The trainer then needs to mark them assessing their basic writing skill.
4. **Conclusion drawn:** The activity helps in understanding the basic writing skills.

Say

Did you like the activity? It was to help understand the basic writing skills strategies.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 3.4: Business Writing

Unit Objectives

By the end of this unit, the participants will be able to:

1. Practice writing letters
2. Practice writing minutes of meeting
3. Practice writing emails and notices
4. Practice expressing everyday opinions, feelings, wishes, needs and preferences in clear and concise writing

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In this unit, the business writing skill has been discussed. This are the writing skill which are mostly needed to write business related contents.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following question:

- What is the procedure of writing of business letter?
- What do you understand by minutes of meeting?

Elaborate

Ask the participants the following question:

- Letters
- Minutes of meeting
- Emails
- Notices
- Overview of business writing

Say

Good morning and welcome back to the program "Office Operations Executive".

Today, we shall learn more about the business writing skill has been discussed.

Activity

E-mail writing

1. **Objective of the Activity:** To understand the procedure of writing a business e-mail.
2. **Materials required:** : Participant handbook, pen, notebook, etc.
3. **Steps required:**
   - The students require to write a business e-mail
   - The e-mail should address a letter to the manager expressing various initiation that needs to be taken in order to develop an organization.
   - After completion, the students need to come one by one and read out their email in front of the class.
   - The trainer then requires to mark them accordingly.
- **Conclusion drawn: :** The activity helps in understanding the procedure of writing a business e-mail.

Say

Did you like the activity? It was to help learn about the procedure of writing a business e-mail.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Answers to the Exercise Questions

Answer the following questions by choosing the correct option:

1. Letter
2. Newsletter
3. Minutes
4. All of the given options
5. Communication from the supervisor to subordinates
6. Email
7. XX
8. Prewrite
9. Proofreading
10. Use of incorrect tense

Answer the following questions briefly.

1. The writing process might be different for individuals, but there are five basic steps that help to structure your time when writing any kind of text. These five steps enable the writer to produce relevant and correct output. For example, the five steps are relevant while you draft a letter, minutes of meeting, email, memo, report etc. These 5 steps are:

   - **Prewriting:** Before you start writing you should always do the necessary research. This research will be for collecting the primary and secondary data to gather useful information about the writing assignment. This research will help you to make notes and identify points on which you will elabo-rate your writing. For example: collecting the relevant information about attendees while writing the minutes of meeting or making notes of the important facts and figures to be included in the letter.

   - **Planning and Outlining:** It is important to use a logical structure to convey information effectively. This will help you to work out the main ideas you want to focus on and also organize them. Identi-fying the topic headings and deciding the logic of each paragraph helps you to plan and outline. For example: identifying the flow and logic in paragraphs of the letter.

   - **Writing the first draft:** Once you have identified the structure you should start writing the full first draft. The first draft gives a clear idea of what is required in the piece of writing. You should also al-locate time effectively so that reasonable duration is given to revising, editing and proofreading.

   - **Revising and Redrafting:** Now look critically at your first draft find areas of improvement. Redraft-ing means substantially adding or removing content, while revising involves making changes to structure by reformulating arguments. Evaluate your first draft, for example, drafting the introduc-tion, body and conclusion of the letter. Writing the main points discussed in the meeting also comes in the first draft.

   - **Editing and Proofreading:** Editing focuses on concerns like clarity and sentence structure. Proof-reading involves reading the text closely to remove typos and ensure stylistic consistency. When editing and proofreading, ensure your text is clear, concise, and grammatically correct.

2. It is important to proofread a letter because letter writing is an art and one can become better gradually through practice. Letter is used to convey an important communication to a specific reader. The language should be clear so that it easily understood by the reader.

Therefore, while proofreading a letter it is important to check for the following points:

• The subject of writing the letter is mentioned in the beginning of the letter
• Divide the letter into paragraphs, to mark changes related to discussion points
• Include all the relevant information
• Be courteous and gentle while highlighting suggestions or complaints
• Keep sentences short and precise
• Use simple and direct language
• Avoid spelling, grammatical and careless mistakes
• Format and indent the letter appropriately

3. 28th June, 2022

   ABC Pvt. Ltd

   New Delhi

   The Sales Manager,

   Fast Sports Ltd,

   Chota Bazaar, Nai Sarak, Delhi

   Subject: To Place an Order for Stationery items

   Dear Sir,

   We would like to purchase stationery items for our organisation as per the list given below. Please ensure the stationery items are of good quality. Please deliver the items within 2 days and note that the payment will be made in cash.

S. No	Item Name	Item Quantity
1.	A4 sheet	50 sheets
2.	Stapler pins	10 boxes
3.	Cello Tape	1
4.	Pen	10
5.	Diary	20

Thanking You

Yours Truly

Karan Singh

HR Department

4. To all employees;

   Subject: Instructions to follow health and hygiene guidelines

   Dear all,

   Welcome Back to the New Normal. We, at PCQ group welcome every employee back to office after the COVID-19 pandemic lockdown. Also, for everyone's health and safety, we encourage you to strictly follow the following guidelines.

   • Wear a mask always
   • Sanitize your hands at regular intervals
   • Maintain social distancing
   • Follow all hygiene protocols

   It is very important to get vaccinated. Please ensure your family is vaccinated. We wish you a great work experience in the 'New Normal'.

   Best Wishes

   Human Resource Department

4. Receive and Make Phone Calls

Unit 4.1 - Listening Skills

Unit 4.2 - Telephone Etiquette

Unit 4.3 - Query, Resolution, Complaint (QRC) Process
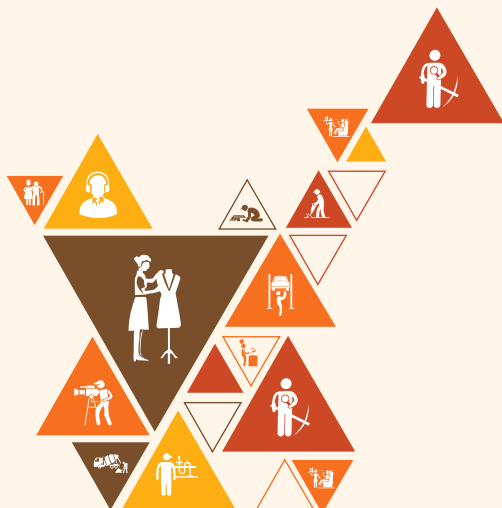
MEP/N0204

Key Learning Outcomes

By the end of this module, the participants will be able to:

1. Attend to phone calls of various stakeholders and channelize them to appropriate authority
2. Greet callers and verify their details, following your organization's procedures over the phone or face to face
3. Comply with relevant standards, policies, procedures and guidelines when dealing remotely with queries
4. Listen carefully to callers/visitors and ask appropriate questions to understand the nature of queries
5. Summarize and obtain confirmation of, your understanding of queries
6. Refer queries outside your area of competence or authority promptly to appropriate people
7. Access your organization's knowledge base for solutions to queries, where available
8. Resolve queries within your area of competence or authority in line with organizational standards

Unit 4.1: Listening Skills

Unit Objectives 🎯

By the end of this unit, the participants will be able to:

1. Analyze the importance of active listening skills
2. Resolve queries within your area of competence and authority

Resources to be Used ⚙️

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note 📋

This unit mainly attempts to highlight the importance of active listening skills. Also, the method of resolving queries within the area of competence and authority has also been outlined.

Say 💬

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do ✓

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask 💬

Ask the participants the following question:

- What stands to be the importance of active listening skills?
- What are the queries within and outside the area of competence?

Elaborate ⚙️

In this session, discuss the following points:

- Importance of active listening skills
- Queries within and outside the area of competence

Say

Good morning and welcome back to the program "Office Operations Executive". Today we will discuss the importance of active listening skills. Also, the method of resolving queries within the area of competence and authority will be elaborated.

Activity

Role Play

1. **Objective of the Activity:** To understand the importance of having proper listening skill for an Office Operations Executive.
2. **Materials (if required):** Participant handbook, pen, notebook, etc.
3. **Steps required:**
   - The class should be divided in two groups
   - The students need to perform a role play based on a business conversation between a manager and an Office Operations Executive.
   - After completion, the trainer needs to make the student accordingly relying on the aptness of their role play topic.
4. **Conclusion drawn: :** The activity helps in understanding the importance of having proper listening skill for an Office Operations Executive.

Say

Did you like the activity? It was for you to understand the importance of having proper listening skill for an Office Operations Executive.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 4.2: Telephone Etiquette

Unit Objectives

By the end of this unit, the participants will be able to:

1. Analyze the importance of telephone etiquette
2. Discuss the dos and don'ts of telephone etiquette

Resources to be Used

Computer, projector, white board/ flip chart, marker and duster, sample document with queries and its answer, sample documents with gendered language.

Note

After completing this session, participants will have a better appreciation of the idea of receiving and managing phone calls as per basic organizational protocol of a cooperative and improving the listening skills. Also, explain and illustrate the technique of resolving customer queries.

Say

Good morning and welcome back to this training program, "Office Operations Executive". Today we shall learn an important unit regarding the process of receiving and managing phone calls as per organizational protocol, improving the listening skills. Also, explain and illustrate the technique of resolving customer queries.

Do

- Start by greeting all the participants to the training session m and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following question:

- What is the importance of maintain telephone etiquette for an Office Operations Executive?

Elaborate

In this session, discuss the following points:

- Telephone etiquette

Say

Let us participate in an activity to explore the unit a little more. We are now going to take part of an interesting session.

Activity

Video Activity

1. **Objective of the Activity::** To understand the importance of maintaining telephone etiquette for an Office Operations Executive.

2. **Materials required:** Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, etc.

3. **Steps required:**
   - This session will have a video activity.
   - You will play a video.
   - The video will give a brief idea about the technique of maintaining business telephone etiquette.
   - They can note down pointers from the video that they may find relevant.
   - After the videos end, the participants can ask questions of you.
   - The participants will raise their hands, and you will pick up the participants who will place their questions.
   - The answering session will be in the form of a discussion where either you or any of the participants knowing the answer can give the answers.

4. **Conclusion drawn:** The activity helps in understanding the importance of maintaining telephone etiquette for an Office Operations Executive.

Say

Did you find this activity interesting? I hope you all enjoyed this session today.

Notes for Facilitation

Did you like the activity? It was for you to understand the importance of maintaining telephone etiquette for an Office Operations Executive.

Unit 4.3: Query, Resolution, Complaint (QRC) Process

Unit Objectives

By the end of this unit, the participants will be able to:

1. Explain the Query, Request, Complaint (QRC) Process
2. Categorize telephone calls as per the QRC process of your organization for better understanding and resolution

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In this section, we will be discussing regarding the query, resolution, compliant (QRC) process.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following question:

- What is the process of Query, Request, Compliant (QRC)?

Elaborate

In this session, discuss the following points:

- Query, Request, Compliant (QRC) process

Say

Good morning and welcome back to the program "Recruitment Executive".

Today, we will learn about the query, resolution, compliant (QRC) process.

Activity

Video Activity

1. **Objective of the Activity:** To understand the technique of resolving customer queries and asking for feedback.
2. **Materials required:** Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer.
3. **Steps required:**
   - This session will have a video activity.
   - You will play a video.
   - The video will give a brief idea about the technique of resolving customer queries and asking for feedback.
   - The YouTube link for the video is: https://www.youtube.com/watch?v=WphIXqTp_es
   - They can note down pointers from the video that they may find relevant.
   - In case of any queries or confusions, participants will write those down in their notebooks.
   - After the videos end, the participants can ask questions of you.
   - The participants will raise their hands, and you will pick up the participants who will place their questions.
   - The answering session will be in the form of a discussion where either you or any of the participants knowing the answer can give the answers.
4. **Conclusion drawn:** This activity helps in understanding the technique of resolving customer queries and asking for feedback.

Say

Did you find this activity interesting? I hope you all enjoyed this session today.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Answers to the Exercise Questions

Answer the following questions by choosing the correct option:

1. Share
2. Greet the caller
3. All of the given options
4. Query, Request, Complaint
5. How can I reach your office location?
6. Kindly refund my money
7. The service you offered is of very quality

Answer the following questions briefly.

1. It is very important to understand the customer's queries and concerns. Only when you have identified the problem, you will be able to provide a resolution to the customers. In many cases you may not be competent enough to provide a resolution. In such a scenario, you should always con-sult your supervisor, a senior colleague or an expert in the field.

2. Providing a resolution or answer to the customer is very important. The answer may come from anyone competent enough to provide the resolution. Therefore, it always beneficial to access the organisation's knowledge base. The following points should be remembered.

   • **Listen:** Be attentive to customers and listen to their queries, in order to understand what the cus-tomer wants.

   • **Acknowledge:** Always let the customer know that you have recognised and documented the que-ry. This gives respite to the customer that they have contacted the required person or depart-ment.

   • **Understand the Concern:** It is very important to identify the customer's concern/query. Only when you have understood it clearly, you will be able to:
     o Check for a resolution yourself
     o Consult a senior colleague/supervisor if required

   • **Provide Resolution/Alternative:** Once you have understood the concern and have identified the type of resolution, you may either provide the required resolution or move to step 5 as given

   • **Consult a Competent Person:** While understanding the concern you may realize that you are not the right person who can provide the resolution. In such a scenario inform the customer that you will get back to them after consulting the right person. If required, you may even share the details of the required person with the customer

   For example,

   • A customer wants to get information regarding his invoice clearance. For this, you may need to consult with the accounts department and then get back to the customer.

   • A customer wants to meet with a senior official in your organization. For this, you will have to speak with the concerned person, check availability and then inform the customer.

3. Listening is the ability to receive and interpret messages in the communication process accurately. Listening is the key to all effective communication. Without the ability to listen effectively, messages are easily misunderstood. As a result, communication breaks leaving the sender and the receiver frustrated and confused. Listening skills are so important that many top employers provide listening skills training for their employees. This is not surprising when you consider that good listening skills can lead to better customer satisfaction, greater productivity with fewer mistakes, and increased sharing of information, leading to more creative and innovative work. Many successful leaders and entrepreneurs credit their success to effective listening skills.

Listening is not the same as Hearing. Hearing refers to the sounds that enter your ears. It is a physical process that happens automatically, provided you do not have any hearing prob-lems. Listening, however, requires more than that: it requires focus and concentrated ef-fort, both mental and sometimes physical as well. Listening means paying attention not only to the story but how it is told, the use of language and voice, and how the other per-son uses his or her body. In other words, it means being aware of both verbal and non-verbal messages. Your ability to listen effectively depends on the degree to which you perceive and understand these messages.

Listening is not a passive process. In fact, the listener can, and should, be at least as en-gaged in the process as the speaker. The phrase 'active listening' is used to describe this process of being fully involved. Listening within the work context is how you understand the needs, demands, and preferences of your stakeholders through direct interaction. A stakeholder could be anyone from your boss, a client, customer, co-worker, subordinate, upper management, board member, interviewer, or job candidate. As a result, active lis-tening skills are very important.

5. Prepare to Co-ordinate Work Tasks

Unit 5.1 - Task Management

Unit 5.1 - Task Management

Unit 5.3 - Operational Requirements in the Office
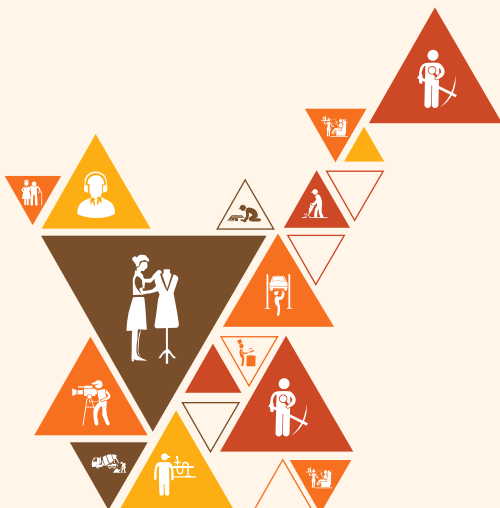
MEP/N0225

Key Learning Outcomes

By the end of this module, the participants will be able to:

1. State various categories of operational activities that require coordination with different agencies and people
2. State various types of operational requirements in an office environment
3. Explain the importance of obtaining complete details about the requirement
4. Identify relevant personnel and agencies involved and obtain their contact details
5. Explain how to prepare a work plan and schedule
6. Prepare efficient to-do lists and work plans and share them with relevant people
7. Identify and assign priorities, responsibilities, dependencies and timelines for work task completion
8. Prepare schedules, set reminders and flag task items according to sequence and importance using calendars and planners
9. Describe how to book appointments and schedule web and phone calls, sending e-invites and relevant instructions
10. Set-up and check voice and video communication tools and applications effectively, prior to making calls

Unit 5.1: Task Management

Unit Objectives 🎯

By the end of this unit, the participants will be able to:

1. Identify and assign priorities, responsibilities, dependencies and timelines for work task completion
2. Create a workplan as per the given guidelines

Resources to be Used ⚙️

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note 📝

In this particular unit, the importance of task management would be discussed. The priorities, responsibilities, dependencies and timelines for work task completion has additionally been outlined in this section. Apart from that the workplan as per the give guidelines have been highlighted.

Say 💬

Good morning, participants and a warm welcome to this training program called "Office Operations Executive"

Do ✓

- Start by greeting all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask 💬

Ask the participants the following question:

- What is the importance of task management?

Elaborate ⚙️

In this session, discuss the following points:

- Understanding of the task

Say

Good morning and welcome back to the program "Recruitment Executive".

Today, we will learn the importance of task management.

Activity

Group discussion

1. **Objective of the Activity:** To understand the setup of audio/ video applications and their troubleshooting for minor breakdowns.
2. **Materials required:** Participant handbook, whiteboard, notebook, writing pad, pen, pencil, marker, etc.
3. **Steps required:**
   - This activity will be based on group performance.
   - Divide the participants into 2 groups
   - Conduct a group discussion on the set-up process of audio/ video applications and their troubleshooting for minor breakdowns.
   - Ask the participants to note down important points
   - Ask the participants what they have learnt from this exercise
   - Ask if they have any questions related to what they have talked about so far
   - Close the discussion by summarizing the important points
   - On completion, review and discuss the errors made by participants (if any)
   - At the end the trainer summarizes the main points of the given topic
4. **Conclusion drawn:** The activity assists in understanding the various the set-up process of audio/ video applications and their troubleshooting for minor breakdowns

Say

Did you like the activity? It was to teach you the importance of task management.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 5.2: Planning and Organizing

Unit Objectives 🎯

By the end of this unit, the participants will be able to:

1. Describe the importance of prioritizing tasks by preparing schedules and planners
2. Use planning tools effectively
3. Prepare efficient to-do lists and work plans and share them with relevant people

Resources to be Used ⚙️

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools

Note 📝

The analysis done here is based on the importance of prioritizing tasks by preparing schedules and planners.

Say 💬

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do ✓

- Start by greeting all the participants to the training session and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask 💬

Ask the participants the following question:

- What is the importance of planning and organizing?
- What stands to be the function of planning tools?
- What do you understand by Eisenhower's Principle?

Elaborate

In this session, discuss the following points:

- Importance of planning and organizing
- Planning tools
- Eisenhower's Principle

Say

Good morning and welcome back to the program "Office Operations Executive".

Today, we will learn about planning and organizing by an Office Operations Executive.

Activity

Role Play - on Greeting Visitors and Clients

1. **Objective of the Activity:** To understand the rights of clients.
2. **Materials required:** Cordless microphones (if required), notebook, pen, pencil, eraser, participant handbook, whiteboard, marker, overhead projector, white screen, etc.
3. **Steps required:**
   - Divide the class into four groups.
   - All the groups will enact the roles that you will give them.
   - This role-play session will be based on the
   - Amongst the 4 two groups will showcase the correct communication procedures while talking to stake holders
   - The other two groups will showcase the correct communication procedures on Confidentiality of Personal Information
   - You will provide the necessary tools required for the task.
   - The participants who will give the instructions will create a list before the session starts
   - The participants who are giving instruction needs to be loud and clear
   - The participants who are receiving instruction need to listen to all the instructions carefully and act accordingly
   - The group that can complete their task first and accurately will be declared as the winner and appreciated in the class with accolades.
4. **Conclusion drawn:** This activity assists in understanding the rights of clients.

Say

Did you like the activity? It was to teach you the importance of prioritizing tasks by preparing schedules and planners.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 5.3: Operational Requirements in the Office

Unit Objectives

By the end of this unit, the participants will be able to:

1. Identify various categories of operational activities that require co-ordination with different agencies and people
2. Identify the agencies and relevant personnel

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In this section, we will be discussing on the operational requirements in the office.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by greeting all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following question:

- What is the process of coordinating with different agencies?

Elaborate

In this session, discuss the following points:

- Coordination with different agencies

Say

Good morning and welcome back to the program "Office Operations Executive".

Today, we will learn about the operational requirements in the office.

Activity

List making

1. **Objective of the Activity:** To understand the various organizational requirements in an office.
2. **Materials required:** Participant handbook, pen, notebook, etc.
3. **Steps required:**
   - The students are required to make a list on the various organizational requirements in an office.
   - After completion, the trainer needs to mark them as per the list made by the students.
4. **Conclusion drawn:** The activity helps in understanding the various organizational requirements in an office.

Say

Did you like the activity? It was to teach you the various organizational requirements in an office.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Answers to the Exercise Questions

Answer the following questions by choosing the correct option:

1. All of the given options
2. Writing simple correspondence
3. List of tasks to be completed in the order of priority
4. Set reminder
5. All of the given options
6. By using only the required resources
7. By reviewing your work
8. Gantt charts
9. Excel Tracker
10. Important and urgent

Answer the following questions briefly.

1. Setting-reminders while using calendars and planners are very important activities that are re-quired to plan and complete any task. Say for example, there is a wedding in your family so the el-ders of the house set reminders and point out dates to plan and organize various tasks. Similarly, students should set reminders and use calendars to plan and organize their study routine before the exams so that they get good marks. Hence, without reminders and calendars it is difficult to complete any given task.

2. Few guidelines to be followed during online meetings are as follows:
   • Check your Internet connection and hardware in advance.
   • Maintain a positive atmosphere.
   • Fix your background.
   • Dress appropriately for the video.
   • Mute your microphone when you're not speaking.
   • Always prepare an agenda.
   • Share files and information before the meeting.

3. Setting-reminders while using calendars and planners are very important activities that are re-quired to plan and complete any task. Say for example, there is a wedding in your family so the el-ders of the house set reminders and point out dates to plan and organize various tasks. Similarly, students should set reminders and use calendars to plan and organize their study routine before the exams so that they get good marks. Hence, without reminders and calendars it is difficult to complete any given task.

4. The importance of maintaining a task checklist and keeping a check on the task timeline is that it:
    • Helps to facilitate objectives and make them more clear and specific
    • Helps to focus the attention on the required task
    • Helps to bring discipline, order and rationality
    • Helps to minimise uncertainty
    • Helps to facilitate co-ordination
    • Helps to identify errors and rectify the same
    • Helps to create healthy work environment
    • Helps to allocate and use resource effectively
    • Helps to avoid wastage of resources
    • Helps to achieve goals
    • Helps to bring innovation and improves performance

6. Execute Follow-Up Activities and Build Good Relations

Unit 6.1 - Communication Etiquette and Netiquette with Internal and External Customers

Unit 6.2 - Modes of Communication for Workplace Collaboration
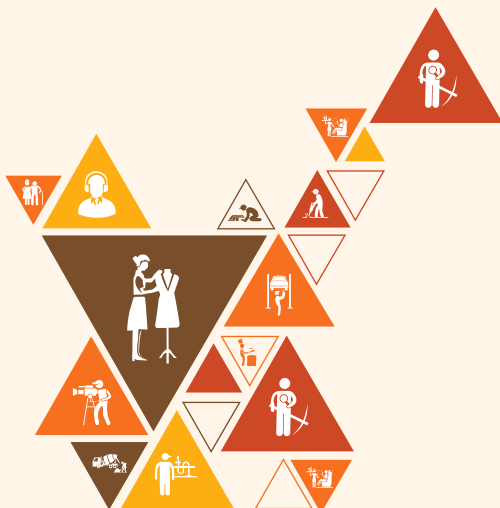
Key Learning Outcomes

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By the end of this module, the participants will be able to:

1. Describe the need of etiquette and netiquette with internal and external customers
2. Discuss various modes of communication for workplace collaboration
3. State features, benefits and limitations of different collaborative technology tools and devices
4. Record response obtained as per standard operating procedure
5. Negotiate with vendors to get optimum value for money as possible
6. Register the vendor in co-ordination with finance team as per organizational norms
7. Check bills and invoices to ensure that they are correct as per the products/services purchased or sold respectively
8. Follow organization process for claiming allowed re-imbursements
9. Perform common banking transactions
10. Explain importance of effective and timely follow-up for achievement of goals and targets

Unit 6.1: Communication Etiquette and Netiquette with Internal and External Customers

Unit Objectives

By the end of this unit, the participants will be able to:

1. Identify the importance of communication etiquette and netiquette
2. Identify the importance of good relationship with internal and external customers
3. Write appropriate apology messages

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In the mentioned section, the communication etiquette and netiquette with internal and external customers have been discussed.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by welcoming all the participants to the training session and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following question:

- What are the ways of communicating with internal and external customers?
- What stands to be the procedure of drafting and sending messages?

Elaborate

In this session, discuss the following points:

- Understanding communication etiquette and netiquette
- Communicating with internal and external customers
- Drafting and sending messages

Say

Good morning and welcome back to the program "Office Operations Executive".

Today, we will learn about the communication etiquette and netiquette with internal and external customers.

Activity

Retrieving and Communicating Data

1. **Objective of the Activity:** To understand the ways of retrieving and communicating data
2. **Materials (If required):** Pen, Paper, participant handbook, Computer with internet
3. **Steps required:**
   - Research and find at least 10 news of different types for a week.
   - Login to your Gmail account and now go to Google drive
   - Create different folders of different news categories. For example, Fashion, Technology etc.
   - Using google sheets, put the news articles and save the news article in the folder of its respective category.
   - Now share some news to your peers via google drive links without allowing them to download.
   - Prepare a report on your observations
   - Share it with your trainer
4. **Measurement Tables (If any)** – NA
5. **Conclusion drawn: –** The activity will help in understanding Retrieving and Communicating Data

Say

Did you enjoy forming the questionnaire? It was to understand about the retrieving and communicating data

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 6.2: Modes of Communication for Workplace Collaboration

Unit Objectives

By the end of this unit, the participants will be able to:

1. Identify the importance of various communication tools at workplace
2. Explain the features, benefits and limitations of different collaborative technology tools and devices

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In this section, we will be discussing regarding the modes of communication for workplace collaboration.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

Ask the participants the following question:

- What are the different communication tools?
- What are the features and benefits of technology tools and devices?

Ask

Ask the participants the following question:

- What are the different communication tools?
- What are the features and benefits of technology tools and devices?

Elaborate

In this session, discuss the following points:

- Understanding communication etiquette and netiquette
- Communicating with internal and external customers
- Drafting and sending messages

Say

Good morning and welcome back to the program "Office Operations Executive".

Today, we will discuss about the modes of communication for workplace collaboration.

Activity

Communication skills

1. **Objective of the Activity:** To understand the strategies for developing efficient communication skills.
2. **Materials required:** Participant handbook, pen, paper, notebook, whiteboard, markers, etc.
3. **Steps required:**
   - Choose any topic from environment, travel or sports
   - Ask the participants to speak on any topic for about 3 minutes
   - Discuss communication skills after the activity is over
4. **Conclusion drawn:** The activity helps in understanding the strategies for developing efficient communication skills.

Say

The activity helps in understanding the strategies for developing efficient communication skills.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Answers to the Exercise Questions

Answer the following questions by choosing the correct option:

1. Email
2. Respectful
3. All of the given options
4. Control your emotion
5. All of the given options
6. By following copyright laws
7. Yes, it helps in better and effective communication
8. Increases knowledge construction
9. All of the given options
10. Never spam others by sending large amounts of unsolicited email

Answer the following questions briefly.

1. Drafting and sending timely messages is also one of the most important ways to build good relationships with colleagues. This is important as it helps to meet certain objectives, helps in building a good rapport with each other and ensures that all operations are carried out smoothly. It also helps in dealing with various kinds of customers and situations.

2. The consequences of positive behavior at a workplace are:
   • Increased productivity
   • Greater probability of collaboration and teamwork
   • Improved morale
   • Ability to overcome adversity
   • Willingness to think creatively and try new things
   • Willingness to share information and ideas
   • Lower turnover
   • Increased sense of camaraderie

3. Health, safety and security measures to be followed at work are:
   • Implement a security system and promote it
   • Check all exit and entry points regularly
   • Train all employees
   • Create a culture around safety and security
   • Secure workspaces
   • Always report unsafe conditions
   • Keep a clean workstation
   • Wear protective equipment
   • Take breaks
   • Don't skip steps
   • Stay up to date with new procedures or protocols
   • Maintain proper posture
   • Offer guidance to new employees

7. Process Documents

Unit 7.1 - Data and Information

Unit 7.2 - Record Keeping
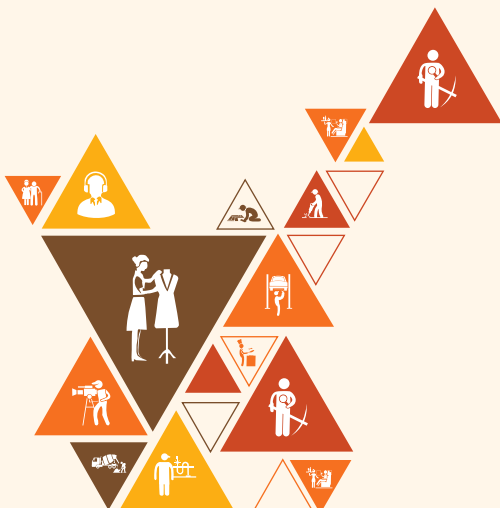
Key Learning Outcomes

By the end of this module, the participants will be able to:

1. Identify the difference between data and information and the need for data security
2. Define record keeping and importance of checking documents
3. Explain the process for receiving, acknowledging and recording incoming documentation
4. Explain the importance of checking documentation thoroughly before processing
5. Explain the need for maintaining records of outgoing documentation
6. Identify actions that need to be undertaken and related parameters, by interpreting information on documentation received, accurately
7. Explain the need for checking for authorization effectively, before sending or sharing any documentation to any person or firm agency requesting for information
8. Take necessary and timely back-ups for essential documentation to avoid loss due to exigencies

Unit 7.1: Data and Information

Unit Objectives

By the end of this unit, the participants will be able to:

1. Analyze the importance of data and information
2. Explain data security measures to protect documents and information from unauthorized access

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In this section, the process and importance of record keeping has been discussed.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following question:

- What appears to be the process of record keeping?

Elaborate

In this session, discuss the following points:

- Data, information and security

Say 💬

In this session, discuss the following points:

Data, information and security

Activity ⚙️

Writing Activity

1. **Objective of the Activity:** To understand the process of maintaining records and documents.
2. **Materials required:** Chair, table, notebook, pen, pencil, eraser, participant handbook, whiteboard, marker, etc.
3. **Steps required:**
   - In this activity, you will divide the class into 2 groups.
   - The participants will have to provide a broad explanation on the following topics.
   - Importance of maintaining list of contract details of various stakeholders, guidelines for storing office correspondence, steps of maintaining the inventory of the required office documentation
   - It is important that the participants present their answers rich in information.
   - You will take 15 minutes to evaluate the answers of the participants.
   - The group which can present their answers in the best way within 20 minutes will be awarded appreciation and accolades.
4. **Conclusion drawn:** This activity helps to understand the importance of maintaining records and documents.

Say 💬

Did you enjoy the activity? It was to understand the importance of maintaining records and documents.

Notes for Facilitation 📝

- Ask the participants if they have any questions.
- Encourage other participants to answer

Unit 7.2: Record Keeping

Unit Objectives 🎯

By the end of this unit, the participants will be able to:

1. Analyze the importance of record keeping
2. Identify the importance of checking the required documents

Resources to be Used ⚙️

Computer, projector, white board/ flip chart, marker and duster, sample document with queries and its answer, sample documents with gendered language.

Note 📝

- Please make sure that while introducing the mentioned concept, you share at least one relevant experience of you, as a trainer
- Take an active interest in the aspirations and needs of the participants before initiating

Say 💬

Good morning and welcome back to this training program, "Office Operations Executive". Today we shall learn an important unit regarding the importance of processing documents.

Do ✓

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for participating in the session and being a part of this training class.

Ask 💬

Ask the participants the following questions:

- What is the importance of data and information?
- What do you understand by data security measures to protect documents and information from unauthorized access?

Elaborate

In this session, discuss the following points:

- The process of Record keeping

Say

Good morning and welcome back to the program "Office Operations Executive".

Today, we will learn about the process and importance of record keeping.

Activity

Practice activity

1. **Objective of the Activity:** The participants need to prepare a questionnaire that can be asked during a candidate interview.
2. **Materials required:** Participant handbook, notebook, pen, whiteboard, markers, charts, etc.
3. **Steps required:**
    - Ask the students to prepare a questionnaire that can be asked during a candidate interview.
    - Ask them to note down their observations in a tabular format
    - Allocate marks based on the performance of individual students
4. **Conclusion drawn:** The activity helps the trainers to identify the steps required to prepare a questionnaire that can be asked during a candidate interview.communication skills.

Say

Did you like the activity? It was to help you determine the process and importance of record keeping.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Answers to the Exercise Questions

Answer the following questions by choosing the correct option:

1. All of the given options
2. Two Factor Authentication
3. Signatures
4. Follow a prescribed checklist for review
5. Records can be easily located and retrieved

Answer the following questions briefly.

1. Steps to Check Documents
   - It is the responsibility of the office operations executive to check the required documents before using them or entering any related data in a form or template. For example:
   - If you have to enter the employee age or address in a form or a given template, you will need to check the source documents from authenticity
   - The data in the minutes of meeting have to be checked before sharing the hardcopy or the softcopy with the attendees
   - The letters, contracts, receipts have to be checked before dispatching
   - Legal agreements, MOU (Memorandum of Understanding), financial documents, Business reports should be checked before filing or dispatching. Following details should be checked:
   - Relevant signatures
   - Important dates
   - Related authorized action to be taken
   - Any other gap as per the prescribed checklist

2. Records contain information that is needed for the day to day work of an organisation. Their purpose is to provide reliable evidence of, and information about, 'who, what, when, and why something happened.

   In some cases, the requirement to keep certain records is clearly defined by law, regula-tion or professional practice. More often, recordkeeping is a matter of policy and good business practice, developed over time to ensure that the organisation can:
   - Refer to records of past transactions to perform subsequent actions
   - Produce evidence of financial or contractual obligations to avoid dispute or protect against legal li-ability
   - Draw on evidence of past events to make informed decisions for the present and future
   - Account for its actions and decisions when required to do so

   Recordkeeping refers to the entire range of functions involved in creating and managing records. It includes:
   - Creating/capturing adequate records
   - Maintaining them in trustworthy recordkeeping systems for defined retention periods
   - Enabling retrieval for use
   - Controlling access according to defined rules
   - Disposing of records that are no longer needed, according to formal retention and disposition rules

- Maintaining and providing information about records holdings
- Documenting recordkeeping practices and actions

3. Many believe that the terms "data" and "information" can be used interchangeably and mean the same. However, there is a subtle difference between the two. Data is the complete list of facts and details like text, observations, figures, symbols, and descriptions. It is the raw list of facts that are processed to gain information. The basic concept of data is associated with scientific research collected by different research organisations.

   Information is the processed, organised and structured data. It provides context for data. However, both the terms are used together; information can be easily understood than data. In simple terms, we can conclude that data is an unorganised description and facts from which information can be extracted.

4. One of the organization's most valuable assets is its information. An Office Operation Executive should ensure that certain types of information be protected from unauthorized release like employee & customer details. This aspect of information security is often referred to as protecting confidentiality. While confidentiality is sometimes mandated by law, common sense and good practice suggest that even non-confidential information in a system should also be protected from unauthorized access.

   Here are a few measures that you should use to prevent any unauthorized access to your company data:

   - **Strong Password Policy -** Adding symbols, numbers and a mix of characters makes the passwords harder to discover. Ensuring a minimum number of characters and that they change it frequently, every 60 days or 90 days, also ensure that old passwords don't stay the same for years
   - **IP access –** It looks at the user's IP address and compares it to a list of allowed IP addresses to see if this device is authorized to access the account.
   - **Two Factor Authentication -** In addition to the usual log in and password, you will need your mo-bile phone to enter an OTP that will instantly be generated for you.

5. The requirement to keep a backup of certain documents is clearly defined by law, regulation or professional practice. To stay compliant and avoid legal trouble, it may be important to keep copies of some documents even after they're not useful for day-to-day operations. For example, you may want to keep copies of all your contracts for up to seven years. Still, you should probably keep auditor reports, annual statements and retirement plan records indefinitely.

8. Maintain Office Related Records and Documentation

Unit 8.1 - Office Records

Unit 8.2 - The 5 S System

Unit 8.3 - Risk- Free Document Storage
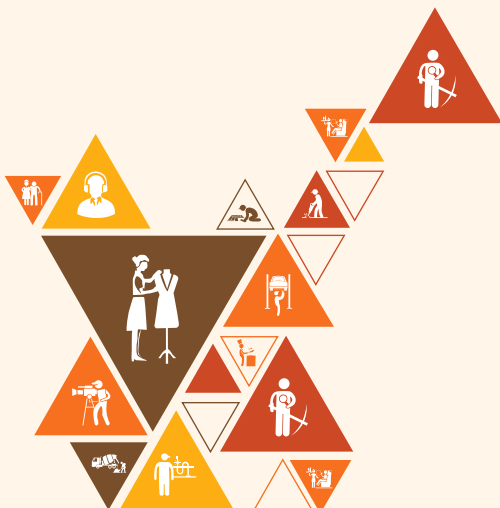
MEP/N0204

Key Learning Outcomes

By the end of this module, the participants will be able to:

1. Explain how to maintain office records by using the various record-keeping techniques
2. Maintain filing system for essential correspondences, vendor rate cards/contracts, office administration related documents and specific documentation given by authorized persons for filing
3. Maintain list of contact details of staff, service providers, suppliers and emergency services.
4. Maintain staff birthday's, list of holidays as well as important dates for the whole organization and share with staff.
5. File documents and develop or modify filing practices
6. Check the files for primary classification, series record, indexing or labelling
7. Manage, record paper files/computer according to business and legal requirements
8. Track movement of files/records
9. Coordinate with various stakeholders and organize meetings
10. Prepare draft notice, agenda and minutes of meeting
11. Seek clarification and confirmation from work supervisor, when necessary, to ensure the work is correctly documented
12. Ensure that documents and information can be retrieve from the filing system smoothly and easily
13. Retrieve and replace documents from the files when required without disturbing the proper order of the filing system
14. Maintain a record of all the files being maintained and take inventory periodically to ensure that all the files are accounted for
15. Take measures to ensure that the documents are safety stored and secured in a risk-free environment

Unit 8.1: Office Records

Unit Objectives

By the end of this unit, the participants will be able to:

1. Describe different types of records
2. Describe the process of record management

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

It appears to be quite important for an Office Operations Executive to have the basic knowledge of maintaining office related records and documentation.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following question:

- What do you understand by record management?

Elaborate

In this session, discuss the following points:

- About records
- Record management

Say 💬

Good morning and welcome back to the program "Office Operations Executive".

Today, we will learn about maintaining office related records and documentation.

Activity ⚙️

Practical activity

1. **Objective of the Activity:** To understand the process of preparing and saving word files and excel file in different folders.
2. **Materials required:** Participant handbook, wide screen or laptop, overhead screen, projector, internet connection, various protective equipment etc.
3. **Steps required:**
   - In this activity, you will randomly pick up trainees and separate them into two groups. Allot the trainees 10 minutes to prepare the topic that you will give them.
   - The first group will prepare a word document and they will demonstrate how to prepare and save a word document.
   - The second group will prepare a client contact list in the excel worksheet and they will demonstrate how to create a file in excel and later they will also save the file in a new folder on their desktop.
   - After the time is up, you will call out any trainee and ask him or her to speak on the topic for 5 minutes.
   - The trainee with the simple explanation but rich in content will be appreciated with accolades.
4. **Conclusion drawn:** The activity helps in understanding the process of preparing and saving word files and excel file in different folders.

Say 💬

Did you like the activity? This was for us to learn about maintaining office related records and documentation.

Notes for Facilitation 📝

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 8.2: The 5 S System

Unit Objectives

By the end of this unit, the participants will be able to:

1. Describe the 5 S system to organize workplace
2. Explain the benefits of organizing and filing various types of office records

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In this section, we will be discussing regarding the 5 S system. Along with it, the benefits of organizing and filing various types of office records would be elaborated.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following question:

- What do you understand by the 5 S System?
- What can be understood by the process of organization or filing?

Elaborate

In this session, discuss the following points:

- The 5 S System
- Organization/ filing

Say

Good morning and welcome back to the program "Office Operations Executive".

Today, we will discuss regarding the 5 S system. Along with it, the benefits of organizing and filing various types of office records would be elaborated.

Activity

Chart Making

1. **Objective of the Activity:** To understand the concept of the 5 S system.
2. **Materials required:** Participant handbook, pen, sketch pens, chart paper, etc.
3. **Steps required:**
   - The students are required to make a chart showing the functions of a 5 S system
   - They are also needed to outline the benefits of using a 5 S system
   - After completion, the students need to come one by one and explain their chart in front of the class.
   - The trainer needs to assess the students as per their chart and explanation.
4. **Conclusion drawn:** The activity helps in understanding the concept of the 5 S system.

Say

Did you enjoy the activity? It was based on the understanding of the concept of the 5 S system.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 8.3: Risk- Free Document Storage

Unit Objectives 🎯

By the end of this unit, the participants will be able to:

1. Explain the physical and digital document security plan
2. Demonstrate measures to ensure that the documents are safely stored and secured in a risk-free environment

Resources to be Used ⚙️

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note 📝

This section tends to elaborate the ways of having the risk- free document storage.

Say 💬

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do ✓

- Start by greeting every participant to the training program and conveying a message of motivation.
- Thank all the participants for joining the particular session, and being a part of this training program

Ask

Ask the participants the following question:

- What do you understand by the document security plan?
- How do you ensure the risk-free environment for document storage?

Elaborate

In this session, discuss the following points:

- Document security plan
- Ensuring risk-free environment for document storage

Say

Good morning and welcome back to the program "Office Operations Executive".

Today, we will learn the importance of having risk-free document storage.

Activity

PowerPoint Presentation

1. **Objective of the Activity:** To understand the importance of having risk-free document storage.
2. **Materials required:** To understand the importance of having risk-free document storage.
3. **Steps required:**
   - The trainer needs to show the students a video which would be based on the importance of having risk-free document storage.
   - After completion, the trainer needs to address the queries raised by the students.
   - A question answering session also should be conducted for the students in order to understand the realization of the students.
4. **Conclusion drawn:** The activity helps in understanding the importance of having risk-free document storage.

Say

Did you like the presentation? The presentation was based on the understanding of the importance of having risk-free document storage.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Answers to the Exercise Questions

Answer the following questions by choosing the correct option:

1. All of the given options
2. Balance Sheet
3. All of the given options
4. Shredder
5. Sort
6. Marking and labelling files
7. All of the given options
8. All of the given options
9. All of the given options
10. All of the given options

Answer the following questions briefly.

1. Proper organizing your records has many benefits, and if you are having trouble finding things regularly or often misplace things, the following suggestions can help you as an office operations executive:

   • **Which records do you need most frequently?**

   Regular usage records/files keep them in the most accessible place, such as a file cabinet within your desk. For those needed by many people, keep them centrally located, so everyone has easy access.

   • **How do you treat those records that you do not need regularly?**

   Keep them in a place that is out of the way, such as a closet or basement, so they do not take up valuable office space and inhibit your ability to locate records needed more regularly.

   • Can these types of records be grouped?

   Filing similar records together by function or project works out well for certain individuals or departments. Many people have a file drawer dedicated to types of records such as finance, staff, or research files. For example, there might be folders inside the finance drawer such as budget, monthly expenses, and account statements.

2. Many people store records/files on their desktop computers. Managing these files can be bothersome but fortunately, computer operating systems are becoming much more proficient at arranging folders and finding files that you are unable to locate. If you do not want to search the hard drive every time, you are looking for a file; the following are a few of the most common options for organizing your computer files:

   • If you want to keep all of your files for a particular project or function together, then you'll have to create a folder for each project or function that you use, such as finance, human resource, and research, and so on.

   • All these main folders will store all your records/files regardless of file types, such as a spreadsheet or word processing. If you are working on the staff files for the day, they would be in one place.

   • One main folder can have all your word processing documents, another main folder with all your spreadsheets, a third main folder containing any databases, and so on.

   • Within these main folders, you would then create sub-folders for each type of record/file, such as finance, staff, research, special projects, etc.
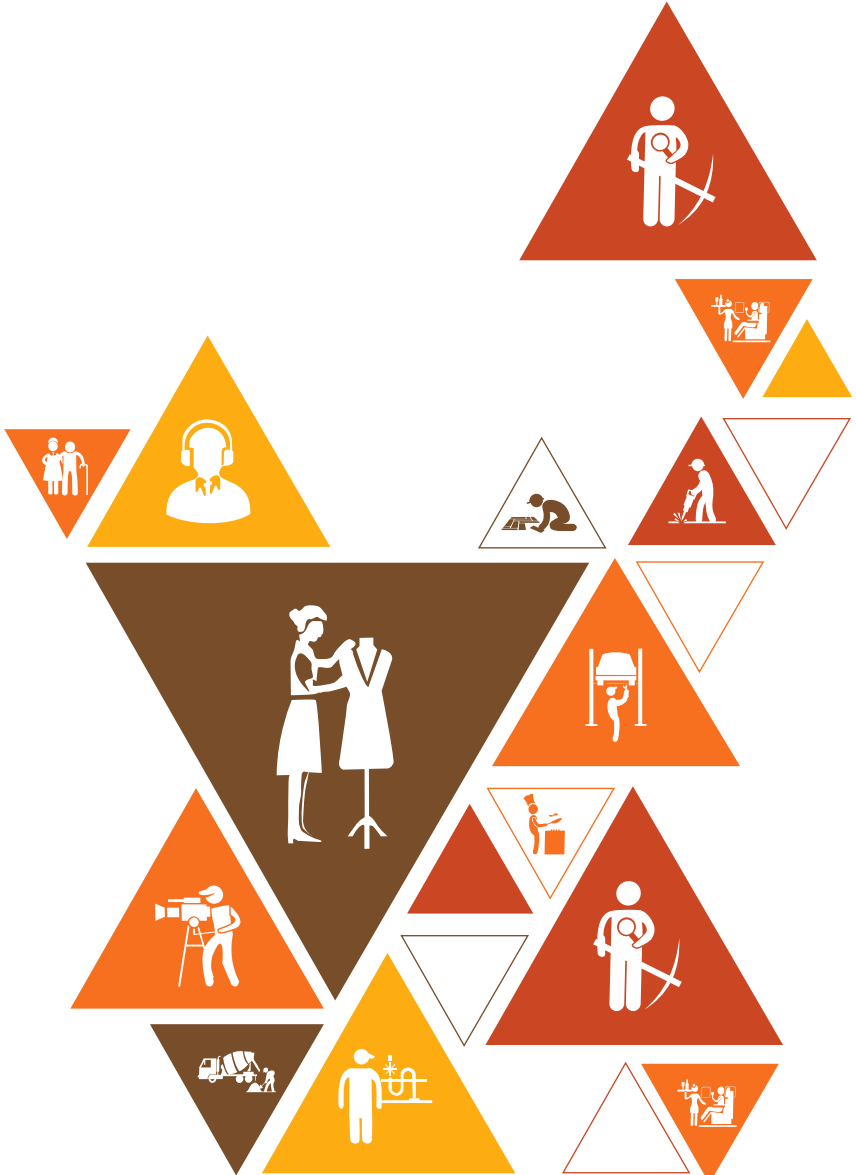
9. Use Computers to Store, Retrieve and Communicate Information

Unit 9.1 - Main Components of a Computer

Unit 9.2 - Using Microsoft Windows

Unit 9.3 - Professional Email Etiquette

Unit 9.4 - Tips for Computer Users
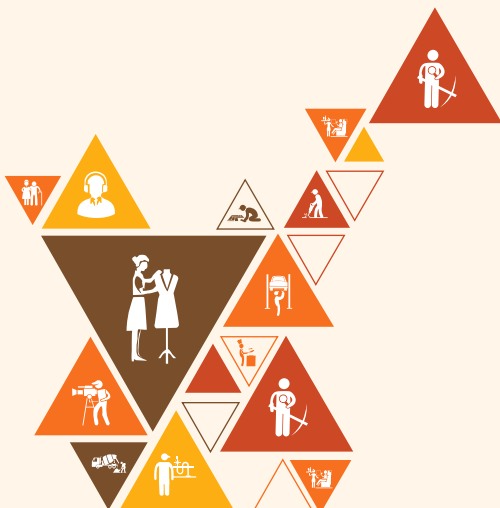
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Key Learning Outcomes

By the end of this module, the participants will be able to:

1. Explain the main components of a computer and how to set up a computer
2. Operate the computer to access data and information on it
3. List various operating systems commonly used by organizations for their computers
4. Demonstrate how to navigate computer drives, directories, folders and software applications to access specified file locations
5. List various application software used in organizations to store, retrieve and communicate information
6. Perform data entry, editing, storage, designing, formatting, referencing, and reviewing activities in a word-processor application
7. Explain how to input, edit and save specified data or information using a spreadsheet application
8. List the various types of printers and their features
9. List various email applications used in organizations
10. Explain professional email etiquette and its various elements
11. Explain the various electrical safety precautions one should follow while using computers and related equipment which use electricity to run
12. Explain ergonomic guidelines specified for working on computers and other similar devices.
13. Describe Cybersecurity guidelines to be followed while storing, retrieving or communicating information online (through the internet) and its importance
14. Explain methods to deal with computer related problems

Unit 9.1: Main Components of a Computer

Unit Objectives

By the end of this unit, the participants will be able to:

1. Describe the functions of a computer
2. Describe difference between computer hardware and software

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In this unit we will discuss about the main components of a computer and also the distinction in the middle of computer software as well as hardware.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

• Start by greeting all the participants to the training program and conveying a message of encouragement.
• Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following questions:

• What are the functions of a computer?
• What are the computer hardware, software and their set-up?

Elaborate

In this session, discuss the following points:

• Functions of a computer
• Computer hardware, software and their set-up

Say 💬

Today, we will learn about the main components of a computer. We will now see a short video.

Activity ⚙

Parts of a computer

1. **Objective of the Activity:** To gain the knowledge regarding the parts of a computer.
2. **Materials required:** Participant handbook, pen, notebook, projector, computer/laptop, etc.
3. **Steps required:**
   - Make a PowerPoint presentation on the components of a computer
   - Make the participants watch and ask them to take notes
   - Clarify any doubts that may arise.
4. **Conclusion drawn:** The activity helps in gaining the knowledge regarding the parts of a computer.

Say 💬

Did you like the activity? It was to teach you the different parts of a computer.

Notes for Facilitation 📝

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 9.2: Using Microsoft Windows

Unit Objectives

By the end of this unit, the participants will be able to:

1. Define Microsoft Windows
2. Demonstrate the use of Microsoft Windows
3. Demonstrate the use of Microsoft Office

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, duster, computer/laptop, Internet connection, overhead projector, laser pointer, equipment and tools.

Note

- Please make sure that while bringing up the concerned topic, you share at least one personal information such as your hobbies
- Take an active interest in the needs and aspirations of the participants before beginning.

Say

Good morning, participants and a warm welcome back to this training program called "Office Operations Executive".

Today we shall learn about Microsoft Windows.

Do

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following questions:

- What are the ways to operate MS- Windows?
- What is the procedure of file management?

Elaborate

In this session, discuss the following points:

- Microsoft Windows
- The ways to operate MS- Windows
- Windows 10 Folder and file management
- Microsoft Office

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Activity

Video Activity

1. **Objective of the Activity:** To understand the importance of knowing about cyber security.
2. **Materials required:** Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer.
3. **Steps required:**
   - This session will have a video activity.
   - You will play a video.
   - The video will give a brief idea about the Cyber Security.
   - The YouTube link for the video is: https://www.youtube.com/watch?v=inWWhr5tnEA
   - They can note down pointers from the video that they may find relevant.
   - In case of any queries or confusions, participants will write those down in their notebooks.
   - After the videos end, the participants can ask questions of you.
   - The participants will raise their hands, and you will pick up the participants who will place their questions.
   - The answering session will be in the form of a discussion where either you or any of the participants knowing the answer can give the answers.
4. **Conclusion drawn:** This activity helps in understanding the concept of cyber security.

Say

Did you enjoy this activity? It was to understand the concept of cyber security.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 9.3: Professional Email Etiquette

Unit Objectives

1. By the end of this unit, the participants will be able to:
2. Discuss email etiquette

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

It appears to be quite important for an Office Operations Executive to have the basic knowledge of drafting an e-mail for effective communication. Thus, this section would be providing the details regarding the composing of an e-mail in order to have their productive interaction with the clients, customers as well as the applicants

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

- Ask the participants the following question:

Elaborate

- In this session, discuss the following points:

Say 💬

Good morning and welcome back to the program "Office Operations Executive".

Today, we will learn about what an email is and how to send them across.

Activity ⚙️

Drafting an e mail

1. **Objective of the Activity:** To understand the process of drafting an e-mail
2. **Materials (if required):** Pen, notebook, computers/laptops, whiteboard, markers, etc.
3. **Steps required:**
   - Instruct the students to draft an email to the company
   - Tell them what it should be about and ask them to include the appropriate subject
   - Assess each of the emails and then discuss
4. **Conclusion drawn:** The activity helps in understanding the process of drafting an e-mail

Say 💬

Did you like the activity? This was for us to learn how to compose emails.

Notes for Facilitation 📝

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 9.4: Tips for Computer Users

Unit Objectives

By the end of this unit, the participants will be able to:

1. Discuss ergonomics tips for computer users
2. Define cybersecurity guidelines

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In this section, the tips have been provided for the computer users. These tips would showcase to be quite useful for an Office Operations Executive in order to operate with their computers in an efficient manner as well as also gather the knowledge of keeping their health fit by following appropriate postures while working in front of a computer.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program
- Introduce yourself briefly to participants, your name and background, and your role in the training program
- Explain the rules of the game

Ask

Ask the participants the following question:

- What are the ergonomic tips for computer users?
- What are the basics of troubleshooting?

Elaborate

In this session, discuss the following points:

- Ergonomic tips for computer users
- Computer safety and cyber security guidelines
- Basic troubleshooting

Say

Good morning and welcome back to the program "Office Operations Executive" Today, we will discuss the tips for computer use.

Activity

Extempore

1. **Objective of the Activity:** To understand the concept of cyber security as well as the ways to prepare an extempore on the World Wide Web (www).
2. **Materials required:** Participant handbook, whiteboard, notebook, writing pad, pen, pencil, marker, etc.
3. **Steps required:**
   - This activity will be based on individual performance.
   - In this activity, you will give two topics to the participants.
   - The first topic in this session will be Cyber Security.
   - The second topic on which the participants will prepare their extempore will be on The World Wide Web (WWW)
   - You will randomly pick up participants and separate them into two groups.
   - Ensure that the participants are equal in number.
   - Allot the participants 2 minutes to prepare the topic that you will give them.
   - After the time is up, you will call out any trainee and ask him or her to speak on the topic for 5 minutes.
   - The trainee with the simple explanation but rich in content will be appreciated with accolades.
4. **Conclusion drawn:** This activity assists in understanding the concept of cyber security as well as the ways to prepare an extempore on the World Wide Web (www).

Say

Did you enjoy the activity? This was to the concept of cyber security as well as the ways to prepare an extempore on the World Wide Web (www).

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Answers to the Exercise Questions

Answer the following questions by choosing the correct option:

1. Hard disk
2. Modem
3. 9Z
4. Google Chrome
5. MS Excel

Answer the following questions briefly.

1. All computers must have an Operating System or OS that runs their programs, applications, manage hardware, recognize inputs from different sources, and control the computer's devices, all without interfering with each other. The flowchart below shows the flow of information of a computer, where the operating system is working as an interface between the user, hardware, and the software:

   Generally, operating systems can be classified under five broad categories:

   - **Real-time:** This is a multitasking operating system that aims at executing real-time applications us-ing specialized scheduling algorithms, with the primary objective being their quick and predictable response to events.
   - **Multi-user:** This operating system allows many users to work on a computer system at the same time. Internet servers can be defined as multi-user systems, as they allow multiple users to access the computer simultaneously.
   - **Multi-tasking:** A multi-tasking operating system allows more than one program to be running at a time.
   - **Distributed:** A distributed operating system is a system that manages a group of independent computers and manages to make them appear to be a single computer.
   - **Embedded:** A very efficient and compact system, embedded operating systems are primarily de-signed to work on small handheld machines like smartphones or PDAs and can operate with a fi-nite number of resources.

2. Two examples of computer hardware parts are:
   - **Monitor:** This is like a television screen that displays information. It is an output device and shows information to the user.
   - **Systems Unit:** The systems unit is also known as the 'Tower unit', is the case that contains the electronic components of the computer. The unit houses the Central Processing Unit (CPU) – the brain of the computer, the Random-Access Memory or RAM, the main memory or Hard Disk Drive (HDD) as well as connects the monitor, the keyboard, the modem, speakers, the mouse and the printer using cables. A power source, connected to the systems unit, provides power to the whole computer

   Application software is a program that directs the performance of particular use or applica-tion of computers to meet end-users information processing needs. They include software such as word processing and spreadsheet packages and internally or externally developed software that is designed to meet the specific needs of an organization. Software trends have been away from custom-designed one-of-kind programs developed by the profes-sional programmers or end-users of an organization toward using software packages ac-quired by end-users from software vendors.

Two types of packages are available:

- **Vertical packages -** assist users within a specific industry segment.
- **Horizontal packages -** can perform a particular general function, such as accounting, or office au-tomation, for a range of businesses.

Two examples of antivirus software that are frequently used are:

- McAfee
- Kaspersky

3. Computers are quite valuable and expensive, and damaging them is not a good feeling. As computers run on electricity, improper use and function can result in electrical related damage. Keep these following simple tips in mind when working with your computers.
    - Extension cords aren't permanent
    - Use all 3-prongs
    - Use GCFI outlets
    - Use a sufficient surge protector
    - Avoid water spillage

Do not attempt to repair the computer if you are not authorised to do so. Always seek the assistance of IT helpdesk available as per organisational policy in case of computer related problems

4. Storage usually means secondary storage. Secondary storage consists of devices, such as disk-ettes, which can store data and programs outside the computer itself. These devices supplement the computer's memory, which, as we will see, can hold data and programs only temporarily.

5. A printer may not be an essential part of your computer, but it is quite useful as and when it is required. It works by transferring data onto paper and can be used for printing documents, emails, photos, and lots of other materials.
    - **Laser Printers:** The laser printer was developed by Xerox in the 1960s when the idea of using a la-ser to draw images onto a copier drum was first considered. Laser printers are still widely used in large offices as they are traditionally more efficient than inkjet printers.
    - **Solid Ink Printers:** Solid ink printers utilise a unique form of ink technology, designed to save space and money on packaging. The printers melt solid ink sticks during the printing process – a method which can help produce more vibrant tones.
    - **LED Printers:** LED printers are similar to laser printers but use a light emitting diode rather than a la-ser to create images on the print drum or belt. Due to their fewer moving parts – LED printers are often considered more efficient and reliable than laser printers.
    - **Business Inkjet Printers:** Utilising inkjet technology on a large scale to accommodate the needs of a busy office with heavy reliance on printed output, inkjet printers are enduringly popular due to their reliability and robust nature
    - **Home Inkjet Printers:** Inkjet printers are one of the most common types of printer used in both professional and domestic settings. Developed in the 1950s, inkjet printing technology is still huge-ly popular today due to its numerous advantages and minimal drawbacks.

- **Multifunction Printers:** Multifunction printers are often capable of performing printing, copying, scanning, and faxing tasks. This can simplify the completion of multiple tasks within an office or domestic environment, with no need for more than one unit.

- **Dot Matrix Printers:** Dot matrix printers are the oldest established type of printers still available on the market. Images and text are drawn out in tiny dots when a print head strikes an ink soaked cloth against the paper in the required pattern or formation.

- **3D Printers:** One of the most exciting developments in printing technology history, 3D printing is becoming more affordable for professional and domestic users. Modern 3D printers are capable of producing 3D objects and items using high quality images

10. Communicating with Colleagues (Seniors, Peers and Subordinates)

Unit 10.1 Communication in an Effective Manner
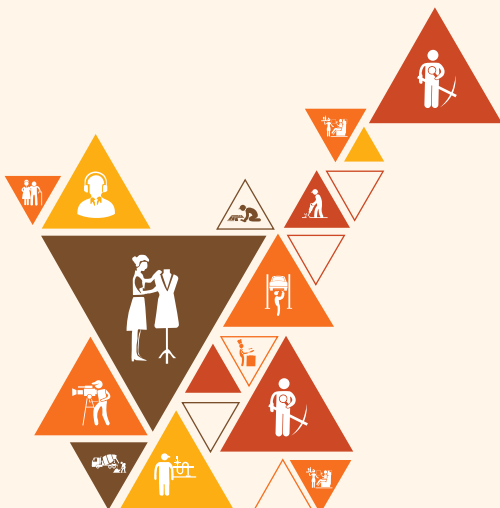
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Key Learning Outcomes

By the end of this module, the participant will be able to:

1. Identify job related requirements, performance indicators and incentives by seeking clarification from reporting superior
2. Record and report work output, exceptions and any anticipated reasons for delays to supervisor as per organizational requirements
3. Seek and receive feedback on performance output and quality
4. Receive information and instructions from colleagues accurately getting clarification where required
5. Accurately pass on information to authorized persons who require it and within agreed timescale and confirm its receipt
6. Give information to others clearly, at a pace and in a manner that helps them to understand
7. State the common reasons for interpersonal conflict
8. Explain the importance of developing effective working relationships for professional success
9. Describe how to express and address grievances appropriately and effectively
10. Explain the importance and ways of managing interpersonal conflict effectively
11. Explain the importance of dealing with grievances effectively and in time
12. Escalate grievances and problems to appropriate authority as per procedure to resolve them and avoid conflict
13. Explain the importance of teamwork in organizational and individual success
14. Display helpful behavior by assisting others in performing tasks in a positive manner, where required and possible
15. Consult with and assist others to maximize effectiveness and efficiency in carrying out tasks
16. State the various components of effective communication
17. Explain the importance of effective communication in the workplace
18. Display appropriate communication etiquette while working. Communication etiquette: do not use abusive language; use appropriate titles and terms of respect; do not eat or chew while talking (vice versa) etc.
19. Explain the key elements of active listening
20. Display active listening skills while interacting with others at work
21. Explain the value and importance of active listening and assertive communication
22. Explain the barriers to effective communication
23. Explain the importance of tone and pitch in effective communication and how to use it
24. Use appropriate tone, pitch and language to convey politeness, assertiveness, care and professionalism
25. Demonstrate responsible and disciplined behaviors at the workplace. Disciplined behaviors: e.g., Punctuality; completing tasks as per given time and standards; not gossiping and idling time; eliminating waste, honesty, etc. Interact with colleagues from different functions clearly and effectively on all aspects to carry out the work among the team and understand the nature of their work
26. Explain the importance of avoiding casual expletives and unpleasant terms while communicating professional circles

27. Describe how poor communication practices can disturb people, environment and cause problems for the employee, the employer and the customer
28. Explain the importance of ethics for professional success
29. Explain the importance of discipline for professional success
30. State what constitutes disciplined behavior for a working professional

Unit 10.1 Communication in an Effective Manner

Unit Objectives

By the end of this unit, the participant will be able to:

1. List the job responsibilities, performance indicators and incentives
2. Show how to record and report work outputs and seek feedback on performance
3. Explain how to receive and pass information and instructions from colleagues and supervisor
4. List the common reasons for interpersonal conflicts and ways to address it
5. Explain how to handle gradiences effectively
6. Summarize the importance of teamwork in induvial and organizational success
7. Describe the impact of positive attitude at workplace
8. List the various components of effective communication
9. Display appropriate communication etiquette with clients and colleagues
10. Demonstrate responsible and disciplined behaviors at the workplace
11. Discuss about ethics for professional success
12. Practice disciplined behavior for a working professional

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In this section, we will be discussing regarding the basic communicating techniques that needs to be used while interacting with superiors and colleagues. Communication is the key to have efficient operations to continue within an organization maintaining the peace as well as effectiveness.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following question:

- What are the common reasons for interpersonal conflicts and ways to address it?
- What stands to be the importance of teamwork in individual and organizational success?

Elaborate

In this session, discuss the following points:

- Job responsibilities, performance indicators and incentives
- Record and report work outputs and seek feedback on performance
- Receive and pass information and instructions from colleagues and supervisor
- Common reasons for interpersonal conflicts and ways to address it
- The importance of teamwork in individual and organizational success
- The impact of positive attitude at workplace
- The various components of effective communication
- Ethics for professional success

Say

Good morning and welcome back to the program "Office Operations Executive".

Today, we will discuss communication with colleagues and superiors.

Activity

Communication skill

1. **Objective of the Activity:** To understand the strategies for developing efficient communication skills.
   Materials required: Participant handbook, pen, paper, notebook, whiteboard, markers, etc.
2. **Steps required:**
   - Choose any topic from environment, travel or sports
   - Ask the participants to speak on any topic for about 3 minutes
   - Discuss communication skills after the activity is over
3. **Conclusion drawn:** The activity helps in understanding the strategies for developing efficient communication skills.

Say

Did you like the game? It was to help build communication skills.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Answers to the Exercise Questions

Answer the following questions by choosing the correct option:

1. Grooming
2. Professionalism
3. All of the above
4. Effective communication
5. For customer's satisfaction

Answer the following questions briefly.

1. Time management is a set of principles, practices, skills, tools, and systems working together to help you get more value out of your time to improve the quality of your life. And it is not necessarily about getting lots of stuff done because much more important than that is making sure that you are working on the right things, the things that genuinely need to be done.

   The importance of Time Management consists of:

   • Helps You Prioritize.
   • Get More Done in Less Time
   • More Quality Work
   • Keeps Things in Context
   • Keeps You on Track
   • Making Sure You Deliver What is promised
   • Time Is Limited
   • Helps Discipline Ourselves

2. Rights of a customer includes:
   • Right to be Informed and Heard
   • Right to Information
   • Right to make a choice
   • Right of Opinion
   • Right to safety

3. Organizational politics refers to behaviors "that occur on an informal basis within an organization and involve intentional acts of influence that are designed to protect or enhance individuals' professional careers when conflicting courses of action are possible" (Drory, 1993; Porter, Allen, & An-gle, 1981). Organisations, in today's world are regarded as institutions whose existence is quite critical and they play a significant role in bringing about transformation, not only in the private business concerns, but also in the public sector. However, not all organisations are successful enough in bringing about such transformation. The ability and performance of such organisations are determined by the policies and practices adopted by the organisation.

4. Being ethical in the workplace means displaying values like honesty, integrity, and respect in your decisions and communications. It means not displaying negative qualities like lying, cheating, and stealing. Workplace ethics play a significant role in the profitability of a company. It is as crucial to an enterprise as high morale and teamwork. It stands to be why most companies lay down specific workplace ethics guidelines that their employees must compulsorily follow. These guidelines are typically outlined in a company's employee handbook. Your appearance carries an impression, make it worthwhile. Dressing has a major role to play when it comes to analysing the personality of an individual.

- Understand your industry's dressing trend: It is vital to dress in line with the trend that your indus-try follows. While being employed in as HR, you cannot expect to show up at work in casual dress-ing.

- Wear well fit clothes: Choose the attires that fit your body and looks good on you.

- Light fragrance: Choose a perfume with light floral or citrus scents. Going to work with pungent scents is considered as inappropriate.

- Polished footwear: Wear a nice pair of shoes boosts your confidence. Shoes have their own story to tell when you meet someone.

- Avoid wearing flashy colourful attires: Neon colours at the workplace are a big disappointment to your professional look. Hues of black, white of neutral colours will always work wonders for your professional dressing. While neon colours are in trend to enhance your personality, but should be worn when you go for an outing or party.

It is insulting to your co-workers or clients to show a lack of concern about your appear-ance. Being wrinkled, unshaven, or unkempt communicates that you don't care enough about the situation, the people, or the company to present yourself respectfully. Clothing should always be clean, pressed, and of good quality.

11. Communicating with Clients and Visitors

Unit 11.1 - Meeting and Greeting Visitors

Unit 11.2 - Interacting with Visitors and Clients

Unit 11.3 - Answering Voice Messages and Emails
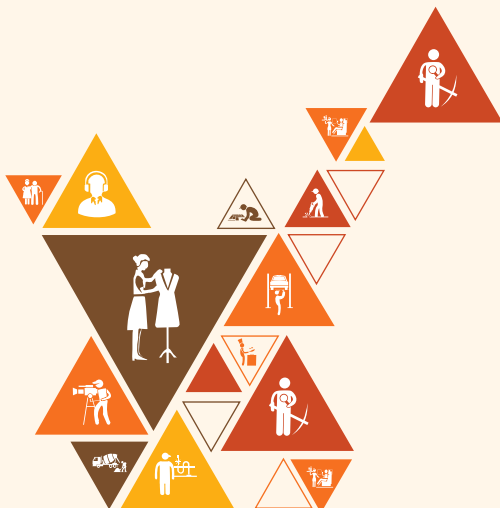
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Key Learning Outcomes

By the end of this module, the participants will be able to:

1. Describe proper meeting and greeting techniques
2. Demonstrate sensitivity towards gender, cultural and social differences such as modes of greeting, formality, etc.
3. Demonstrate proper body language, dress code, gestures and etiquettes towards the customers
4. Demonstrate clear verbal communication and active listening
5. Explain how to avoid negative questions and statements to the customers
6. Explain how to provide clear and accurate information to visitors as per their requirement while following organization policies for information access and confidentiality
7. Demonstrate how to respond to the customer immediately for their voice messages, e-mails, etc.
8. Explain the process to seek feedback from the visitors on their experience

Unit 11.1: Meeting and Greeting Visitors

Unit Objectives 🎯

By the end of this unit, the participants will be able to:

1. Demonstrate proper communication with visitors and clients
2. Demonstrate proper business etiquette when dealing with visitors and clients

Resources to be Used ⚙️

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note 📝

In this section, we will be discussing about the interacting technique with visitors and clients. For an Office Operations Executive it stands to be quite important to have the knowledge of the proper business etiquette that needs to be carried out by a professional while dealing with the visitors as well as clients.

Say 💬

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do ✓

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask 🗨️

Ask the participants the following question:

- What are the ways of greeting visitors and clients?
- What do you understand by business etiquette?

Elaborate

In this session, discuss the following points:

- Greeting visitors and clients
- Business etiquette

Say

Good morning and welcome back to the program "Office Operations Executive".

Today we will learn how to interact with clients and visitors.

Activity

Role play to effectively respond to phone calls at work

1. **Objective of the Activity:** To effectively interact using the telephone in complex situations at workplace
2. **Materials (if required):** pen, paper, telephone (if required)
3. **Participants required:** 2 (Participant A – Receptionist, Participant B – Caller (Customer)
4. **Steps required:**
   - A customer calls the receptionist and enquires about the organisation and shows interest for business opportunities
   - The receptionist has to communicate effectively on the phone by following the given steps:
   - Answer the phone quickly, within three rings
   - Have a pleasant tone when answering phone calls
   - Keep a note pad and pen handy when answering calls
   - If there is a pause on the other end of the phone, ask for clarification: "Is there anything else I can help you with?"
   - Summarise the entire conversation at the end
   - Transfer the call of required or else promise a call back after sharing the conversation points with the concerned person
   - Transfer the call of required or else promise a call back after sharing the conversation points with the concerned person
5. **Conclusion drawn:** The activity helps to effectively respond to phone calls at work

Say

Did you enjoy the activity? It was to understand to effectively interact using the telephone in complex situations at workplace.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 11.2: Interacting with Visitors and Clients

Unit Objectives 🎯

By the end of this unit, the participants will be able to:

1. Explain the importance of effective communication with clients and visitors
2. Explain the guidelines to deal with dissatisfied customers and address their complaints effectively

Resources to be Used ⚙️

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools

Note 📝

In this section, the process of interacting with the visitors and clients will be discussed.

Say 💬

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do ✓

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask 💬ask

Ask the participants the following question:

- What are the strategies for effective communication with clients and visitors?
- What are the process of handling dissatisfied customer?

Elaborate ⚙️

In this session, discuss the following points:

- Strategies for effective communication with clients and visitors
- Handling dissatisfied customer

Say

Good morning and welcome back to the program "Recruitment Executive".

Today we will learn how to interact with clients and visitors.

Activity

1. **Questionnaire for post-visit survey**
2. **Objective of the Activity:** To understand the process of creating a questionnaire for post- visit survey.
   Materials required: Participant handbook, pen, paper, laptop, computer, etc.
3. **Participants required:** 2 (Participant A – Receptionist, Participant B – Caller (Customer)
4. **Steps required:**
   - Teach the participants how to develop a questionnaire for the post-visit survey of any client.
   - Ask them to include factors like satisfaction level, if they plan to attend similar events in future, suggestions for improvement, recommendations to friends.
   - Discuss after the activity is over.
5. **Conclusion drawn:** The activity helps in understanding the process of creating a questionnaire for post-visit survey.

Say

Did you enjoy forming the questionnaire? It was to understand the steps of building one.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 11.3: Answering Voice Messages and Emails

Unit Objectives ⊙

By the end of this unit, the participants will be able to:

1. Identify the importance of email etiquette
2. Explain how to respond to the calls and voice messages

Resources to be Used ⚙

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools

Note 📋

In this unit, the process of answering voice messages and emails by an Office Operations Executive has been outlined.

Say 💬

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do ✓

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for participating in the session and being a part of this training class.

Ask (ask)

Ask the participants the following question:

- What stands to be the importance of email etiquette?
- How responding to calls and voice messages need to be done by an Office Operations Executive?

Elaborate ⚙

In this session, discuss the following points:

- Importance of email etiquette
- Responding to calls and voice messages

Say

Good morning and welcome back to the program "Office Operations Executive".

Today, we will learn about the process of answering voice messages and emails by an Office Operations Executive.

Activity

1. **Role play**
2. **Objective of the Activity:** To understand the ways to respond to calls and voice messages.
3. **Materials (if required):** Participant handbook, cordless phone, pen, notebook, etc.
4. **Steps required:**
   - The class needs to be divided into two groups
   - Each group requires to enact a situation in which they have to convince their clients regarding any particular complaint
   - After completion, the trainer requires to mark them accordingly.
5. **Conclusion drawn:** The activity helps in understanding the ways to respond to calls and voice messages.

Say

Did you enjoy the activity? This was to help you understand the ways to respond to calls and voice messages.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Answers to the Exercise Questions

Answer the following questions by choosing the correct option:

1. Being distracted over phone during workplace meetings
2. Modem
3. For discipline
4. When the person nods and smiles
5. All of the given options

Answer the following questions briefly.

1. When it comes to professionalism in behaviour, few rules are not meant to be broken. Here are a few guidelines, which should be followed when dealing with a visitor or client:

   • Pay attention to names - Do not carelessly distort their name or devise a nickname.

   • Greet everyone with a handshake (can be avoided in case of any pandemic/medical emergency etc.) and make eye contact - Make eye contact when you shake your hand and smile. Those who avoid making eye contact are viewed as lacking confidence and honesty.

   • Introduce yourself - Give a little more information than just your name, though. You might add your role at your company and what you do

   • Give cues that show you are paying attention - When someone else is speaking, it is important to nod or smile. This indicates that you are concentrating and actively listening.

   • Dress appropriately - Dressing smart shows that you put effort into your appearance and are more likely to put the same enthusiasm into your work

   • Always practice good hygiene - Comb your hair. Trim your beard. Clean your fingernails. Make sure your clothes smell good.

   • Do not overshare, but do not be too reserved either - Remember to respect others' privacy and personal space. You may be contented sharing details about yourself, but others may not be.

   • Be aware of nonverbal cues - Everything from your posture to your furrowed brow is a form of communication. Stand upright, smile and display a positive body language

   • Do not be complainers - If you notice an issue that should be addressed, do not simply whine about it. Offer solutions to issues, and be careful about how you raise the topic.

   • Avoid using your phone while interacting - Texting or surfing the Internet on your phone during in-teraction is rude. Checking your Facebook feed, WhatsApp message, or Twitter notifications in front of a client reflects poorly on your company. Switch it to silent mode or turn it off completely.

2. Interpersonal conflicts occur between individuals in the organization. The major causes of conflict in an organization are as follows:

   • **Misunderstanding -** Misunderstanding is one of the major causes of conflict in the organization. When employees do not understand their tasks, roles, and responsibilities the conflict arises. Due to this, they may not complete their tasks as the manager expected from them. It may be due to poor communication from manager to employees.

   • **Personal Differences -** Personal differences are the fundamental causes of interpersonal conflict in the organization. The differences occur in the individual due to various reasons such as family background, values, attitudes, traditions, culture, education, and socialization process. Personality differences create conflict among people. It effects on emotions of individuals.

   • **Information Deficiency -** Communication breakdown is one of the reasons for conflict. The lack of close communication and transformation of rigid information create misunderstanding

among the people. It creates the problem of distrust and conflict. Therefore, it is essential to communicate the right information at the right time to the related persons.

- **Goal Differences -** The goal is the basis for organizational performance. All activities of the individ-uals concentrate on achieving predetermined goals. Therefore, if individuals in the same group ini-tiate different goals it may cause conflict among group members. They cannot do work effectively.

- **Lack of Role Clarification -** People of a company perform various roles that are interrelated to one another. The absence of role exposition among people generates conflict. It can create role con-flict. For example, role conflict between production and marketing managers. Thus, it is necessary to make a proper division of work and delegation of authority on the basis of responsibility.

- **Threat to Status -** Status is the social rank that an individual obtains in the organization. It is based on knowledge and position. When any threat generates to an individual in his status it may create conflict. The main responsibility of top management is to maintain balance among subordinates working together for common goals.

- **Lack of Trust -** Lack of trust is also one of the causes of conflict in the organization. All individuals working in a group must have mutual trust to achieve common goals. They need to do activities on the basis of mutual cooperation and support. Lack of mutual trust among group members creates conflict. It generates barriers to achieving goals.

- **Scarce Resources -** The common reason for the conflict is scarce resources. When organizational resources become limited it increases the wants of individuals in a group. Limited resources gener-ate conflict as scarcity motivates people to compete with others to achieve objectives. For this management needs to take necessary steps so that individuals in the group can mobilize resources on the basis of their skills and experiences.

- **Poor Communication -** Communication is the means of exchanging guidance, instructions, and suggestions between the members of the organization. The poor communication system in the organization creates the problem of exact transformation of information among the group mem-bers, which leads to conflict among them. Thus, there must a two-way communication system in order to make proper communication.

- **Organizational Changes -** Change in organizational structure, division of work, authority and re-sponsibility, etc. are essential to cope with environmental changes. Such changes can change the job liability, status, position, and authority of the people in the group. It can change the formal re-lationship and job responsibility of group members. This may be one of the reasons for conflict among group members of the organization.

3. Employee grievance or team grievance may be any genuine or imaginary feeling of dissatisfaction or injustice, which a team member experiences about his job, its nature, and management policies and procedures. If it comes to the notice of the management, it is necessary to address them promptly.

   Grievances take the form of collective disputes when they are not resolved. Also, they will then lower the morale and efficiency of the team. Unattended grievances result in frustra-tion, dissatisfaction, low productivity, lack of interest in work, absenteeism, etc. The team leader must adopt the following approaches to manage grievance effectively:

- **Quick Action:** It is essential to address the grievance as soon as it arises to prevent detrimental ef-fects on the team and their performance.

- Acknowledging Grievance: Acknowledgment of the grievance by the manager or team leader shows that they are eager to look into the complaint impartially and without any bias.

- **Examining the cause of grievance:** The actual cause of resentment should be identified. Accordingly, remedial actions should be taken to prevent a repetition of the grievance.

An effective grievance review procedure ensures a cordial work environment because it redresses the grievance to the mutual satisfaction of both the employees and the manag-ers.

4. Poor communication practices often create a tense environment where people are not motivated to be productive and not inspired to collaborate. This lack of motivation then affects how employees relate to clients and potential customers, negatively affecting the bottom line.

5. Here are a few communication concepts that you can use to communicate effectively with a dissatisfied customer or visitors, appreciating them, and increasing customer satisfaction and loyalty.

- **Patience:** A customer reaches out to you when unsure, confused, or has a grievance. He may, sometimes, be angry because of miscommunication or because he feels that he has been treated dishonestly. At times, endurance is required just to understand the problem, let alone offer a so-lution. But, in the end, being patient will make you a winner. Be patient and capture the finer de-tails; keep in mind that excellent service is better than fast service.

- **Accuracy of information:** The turnaround time for any service or waiting communicated to the cus-tomer must be the same across all levels and departments. You must ensure that visitors com-municate accurate turnaround times, which can set expectations. Any disparity in this will lead to an unhappy customer.

- **Proactive approach:** When a customer has called you to get an issue resolved, the resolution may take more time than required. In such situations, when you have a customer waiting for your re-sponse, be proactive and keep the customer informed of the progress rather than have the cus-tomer get in touch with you repeatedly for an update.

- **Attentiveness:** While attending to a customer grievance, it will just aggravate the situation if you happen to miss any important details. So, block out the noise and focus entirely on the query at hand; have a pen and paper handy to help you make notes.

- **Avoid interruption:** When customers complain or tell you the events that led to their disappoint-ment, do not interrupt. You might have heard the same lines before, and you might think that of-fering a quick solution would make for great customer service. However, interrupting customers upsets them and makes them feel less valued.

- **Know your product/service offered inside out:** Customer queries can be anything under the sun, but mostly they related to the product/service your brand offers. There is no excuse for an em-ployee to not be aware or well versed with the products/services that his organization offers.

- **Honesty works every time:** In case you are not aware of any aspect of the details that the business has to offer, tell the customer you will get the exact information for them. Don't wing it by saying 'I think...' or 'It could be...'. This sort of communication will create doubts about your organization and your brand. Also, if waiting is going to take longer than usual, communicate that to your cus-tomers plainly. Most often, customers are angered because their expectations are not set right. Also, it is a great idea to share the process that you will follow. This awareness will make the cus-tomer more confident and less irate.

- **Active Listening and acknowledgements:** Your body language speaks louder than words. When customers are communicating with you, they should not feel uncared for. Make sure you actively listen, ensuring that the customer does not have to repeat himself. Also, ensure that you acknowledge the customers' messages by using positive words. Give them the sureness that you are around to help them and that you will find the best possible solution for them.

- **Do not take short cuts:** At the end of a long day, you tend to provide short cuts or slack service to complaints and queries. Do remember that the customer might be the fiftieth one you are attend-ing to on that day, but you are his first service representative. Most of the splendid customer ser-vice stories out there are of employees who did more than what they were expected to do.

- **Acknowledgement:** Get into the habit of acknowledging people. Say thank you when they do something for you or bring something to your attention. Acknowledging people encourages them to do more of the same and makes them feel good about talking with you. Not recognising people when they deserve it will have the opposite effect.

12. Workplace Safety

Unit 12.1 - Health and Safety at the Workplace
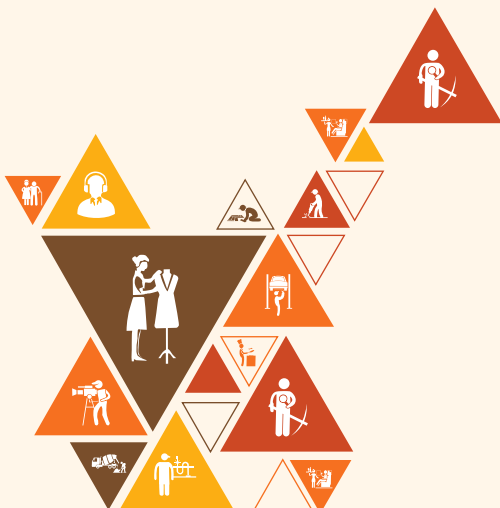
MEP/N9903

Key Learning Outcomes

By the end of this module, the participants will be able to:

1. Explain the meaning of "hazards" and "risks".
2. State the health and safety hazards commonly present in the work environment and related precautions.
3. Explain possible causes of risk, hazard or accident in the workplace and why risk and/or accidents are possible. Possible causes of risk and accident: physical actions; reading; listening to and giving instructions; inattention; sickness and incapacity (such as drunkenness); health hazards (such as untreated injuries and contagious illness).
4. Explain the methods of accident prevention. Methods of accident prevention: training in health and safety procedures; using health and safety procedures; use of equipment and working practices (such as safe carrying procedures); safety notices, advice; instruction from colleagues and supervisors.
5. State safe working practices when working with tools and machines.
6. State safe working practices while working at various hazardous sites.
7. State where to find all the general health and safety equipment in the workplace.
8. Identify, control and report health and safety issues relating to immediate work environment according to procedures.
9. Work safely and apply health and safety practices in the training and assessment environment including using appropriate personal protective equipment (PPE) where required.
10. Explain the importance of using protective clothing/equipment while working.
11. Follow procedures and instructions for dealing with hazards, within the scope of responsibilities and competencies.
12. Document and report all hazards, accidents and near miss incidents as per set process.
13. Document safety records according to organizational policies.
14. Maintain the work area in a clean and tidy condition
15. Maintain personal hygiene.
16. Report hygiene related concerns promptly to the relevant authority

Unit 12.1: Health and Safety at the Workplace

Unit Objectives 🎯

By the end of this unit, the participants will be able to:

1. Identify common health and safety hazards at workplace
2. Explain how to prevent accidents at workplace
3. Demonstrate safe working practices
4. Report health and safety issues, accidents and near miss incidents as per organizational process
5. Apply health and safety practices in the training and assessment environment
6. Explain how to maintain the work area in a clean and tidy condition
7. Explain how to maintain personal hygiene

Resources to be Used ⚙️

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note 📝

This section provides the details regarding the various environmental hazards which is capable of affecting the continuing operations in an organization. It additionally discloses the facts that are responsible for the workplace hazards.

Say 💬

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do ✓

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for participating in the session and being a part of this training class.

Ask ✍

Ask the participants the following question:

- What are the common health and safety hazards at workplace?
- What are the ways to prevent accidents at the workplace?

Elaborate

In this session, discuss the following points:

- Common health and safety hazards at workplace
- Prevention of accidents at workplace
- Safe working practices
- Maintaining the work area in a clean and tidy condition
- Maintaining personal hygiene

Say

Good morning and welcome back to the program "Office Operations Executive".

Today, we will learn about the various environmental hazards which is capable of affecting the continuing operations in an organization.

Activity

Fire Drill

1. **Objective of the Activity:** To understand the process of conducting a fire drill.
2. **Materials required:** Alarm, fire extinguisher, notebook, pen, etc.
3. **Steps required:**
   - Perform a fire drill with the participants
   - When the bell rings, ask the participants to guard themselves and make a queue
   - Ask them to move towards the fire exit and come out of the building
   - Teach them to use a fire extinguisher
   - Discuss the doubts after the activity
4. **Conclusion drawn:** The activity helps in understanding the process of conducting a fire drill.

Say

Did you enjoy the activity? This was to help you understand the basic rules of saving yourself from any potential fire at the workplace.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Answers to the Exercise Questions

Answer the following questions by choosing the correct option:

1. Accident
2. Employees
3. Electrical
4. Harassing
5. Fire

Answer the following questions briefly.

1. Equipment such as Fire Extinguishers, First Aid Equipment, Safety Equipment, Clothing, Safety Installations such as Fire Exits, Exhaust Fans, etc., is available. The workers should be trained upon the use of personal protective gear. Some of the basic do's and don'ts have been listed over here as:

   Do's

   • Provide suitably tested Personal Protective Equipment (PPE) appropriate to the risk identified
   • Ensure the personnel are adequately trained in using the PPE
   • The PPE should be free of dirt, abrasions

   Don'ts

   • Allow the untrained individual to use PPE
   • Use equipment that has not been tested
   • Use a harness in the twisted condition
   • CCTV Surveillance

   Employers or unions can conduct an overall safety audit of the workplace with the security department's assistance. Some general workplace safety procedures that need to be adopted by an establishment to make the place safe are listed below:

   • Individuals who are neither employees nor patrons of the organization must present identification proof to the security before entering the work premises
   • Employee information should be kept secured under password-protected software to prevent easy access and exploitation
   • If the establishment has a parking lot, it should be adequately lighted and under CCTV surveillance
   • All area of the workplace should be under CCTV surveillance
   • Thorough background checks should be conducted before employing someone

   The company should conduct safety training, so employees know how to access assistance for themselves or others in case of danger. The company should retain any threatening e-mails or voicemail messages, record all threatening acts or behavior in case of legal action in the future.

2. An office operations executive should have a general sense of hygiene and appreciation for cleanliness for the benefit of self and the customers. The cleanliness habits and practices which an office operations executive should adhere are:

   • The staff members should be encouraged to wash their hands after cleaning activities and before making food in the kitchen

- Hand sanitisers should always be made available to the staff members
- Regular and thorough cleaning should take place in areas such as the kitchen and washroom

Ensure that the staff members maintain basic personal hygiene at work like clean-shaven, neatly tied hair for women, and neat and clean uniforms. Personal hygiene is an essential part of grooming standards and ensures the overall quality of services.

3. To ensure zero accidents, an office operations executive should follow several safety procedures:
   - The supervisors must strictly enforce the safety rules
   - The staffs must be provided with protective wears to reduce the risk of accidents and hazards such as gloves, masks, etc.
   - The staff must be asked to adhere to the safety checklists as prepared by the Housekeeping su-pervisor.
   - Ensure to use non-slip liquids and waxes to polish and treat floors, if required;
   - Use rubber mats to the places where floors are constantly wet. Floor cleaning and mopping is an integral part of daily maintenance work at offices.

   Some of the Do's and Don'ts must be listed over here:

   Do's

   - Ensure that the floor is swept daily to keep it dust-free
   - Ensure to keep water off the floor
   - Ensure that any spills or moisture is immediately removed from on the floor
   - Ensure that the texture of the office floor is maintained

   Don'ts

   - Ensure that the wooden floor is not cleaned with water
   - Ensure that acids are not used to clean wooden floor
   - Ensure that dustbins are not left open

An office operations executive should always have the records and document the hazards, accidents, and near-miss incidents. These safety records should also be documented as per the organizational policy. An office operations executive must always report to the line manager in case anything suspicious is found.

4. There should be a planned and systematic approach to implementing the safety and health policy through an effective safety and health management system. The aim is to minimise risks. Risk As-sessment methods should be used to determine priorities and set objectives for eliminating haz-ards and reducing risks.

   A good hazard reporting procedure negates many of the issues associated with these two bottlenecks by:

   - Making it easy for people to document hazards,
   - Streamlining the flow of hazard reporting
   - Information and
   - Aggregating and displaying that information in such a way that a person or people can make in-formed decisions about what to do about those hazards.

Implementing a better hazard reporting procedure can feel overwhelming at the best of times. Ripping up your old and tired processes is probably what you want to do, but im-plementing a new system and new hazard reporting procedure can be difficult.

- Workplace fire accidents can be prevented by a fire extinguisher. A fire extinguisher is an active device used to protect us against fires. It is often used in emergencies to extinguish and control small fires. A fire extinguisher typically consists of a hand-held cylindrical pressure vessel that con-tains an agent that can be discharged to extinguish a fire.
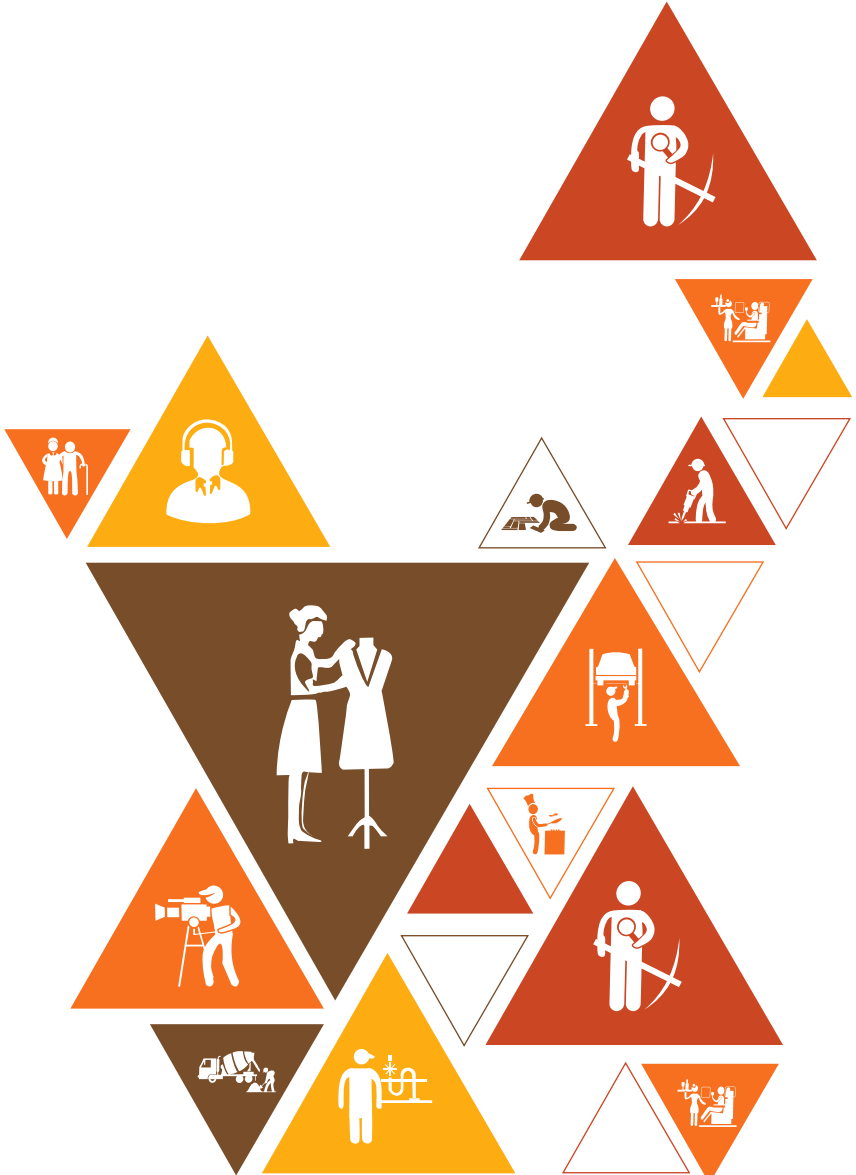
13. Fire Safety

Unit 13.1 - Fire Hazards and Safety

Unit 13.2 - Fire Extinguishers

Key Learning Outcomes

By the end of this module, the participants will be able to:

1. Describe and use different types of fire and appropriate fire extinguisher for each of them
2. Explain the precautionary activities to prevent the fire accident
3. Describe the techniques of using the different fire extinguishers
4. Classify rescue techniques applied during a fire hazard
5. State the different methods of extinguishing fire

Unit 13.1: Fire Hazards and Safety

Unit Objectives

By the end of this unit, the participants will be able to:

1. Explain fire hazards at workplace
2. Identify different types of fire

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In this section, we will be discussing on the importance of workplace cleanliness.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following question:

- What are the sorts of fire accidents that can take place at the workplace?
- What is the classification of fire and fire extinguishers/ extinguishants?

Elaborate

In this session, discuss the following points:

- Fire accidents at workplace
- Classification of fire and fire extinguishers/ extinguishants

Say 💬

Good morning and welcome back to the program "Office Operations Executive".

Today we will learn about fire prevention.

Activity ⚙️

Chart paper making activity

1. **Objective of the Activity:** To understand the importance of workplace cleanliness.
2. **Materials required:** Participant handbook, whiteboard, notebook, writing pad, pen, marker, etc.
3. **Steps required:**
    *   Divide the entire class into 4 groups
    *   Provide each group with a chart paper, pencil, sketch pens, rulers, etc.
    *   Ask each group to make a chart paper presentation on the materials and procedures for cleaning store areas
    *   Ask the trainees to gather required information from the participant handbook
    *   Appreciate the team work and hang/paste the best presentation in the wall magazine/ bulletin board
4. **Conclusion drawn:** The activity helps in understanding the importance of workplace cleanliness.

Say 💬

Did you enjoy the activity? It was to find out the importance of workplace cleanliness.

Notes for Facilitation 📝

*   Answer all the queries/ doubts raised by the participants in class
*   Encourage other participants to answer problems

Unit 13.2: Fire Extinguishers

Unit Objectives

By the end of this unit, the participants will be able to:

1. Demonstrate correct fire extinguisher usage techniques
2. Identify different types of fire extinguisher and the evacuation procedure

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In this section, we will be discussing on the techniques of fire prevention or suppression which is required to be known by every professional working at a workplace, including an Office Operations Executive.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following question:

- What are the ways of using a fire extinguisher?
- What are the commonly used fire extinguishers?

Elaborate

In this session, discuss the following points:

- Using a fire extinguisher
- Commonly used fire extinguishers

Say

Good morning and welcome back to the program "Office Operations Executive".

Today we will learn about fire prevention.

Activity

Chart making

1. **Objective of the Activity:** To perform a chart making session on the various types of fire extinguishers.
   Materials required: Chart paper, pen, pencil, sketch pens, participant handbook, etc.
2. **Steps required:**
   - Make a chart on the different types of fire extinguishers
   - Provide elaborated details about each of them along with their chemical compositions
   - List down each of their usages
   - Paste or draw pictures of the various fire extinguishers
3. **Measurement table (if any)**: NA
4. **Conclusion drawn:** The activity helps in identifying the various types of fire extinguishers and their usages.

Say

Did you enjoy the activity? It was to find out the uses of different fire extinguishers

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

14. Emergency, Rescue and First Aid

Unit 14.1 - Responding Promptly to Medical Emergencies

Unit 14.2 - First Aid Kit and Basic First Aid Procedures

Unit 14.3 - Exposure to Toxic Materials

Unit 14.4 - Safe Lifting and Carrying Practices
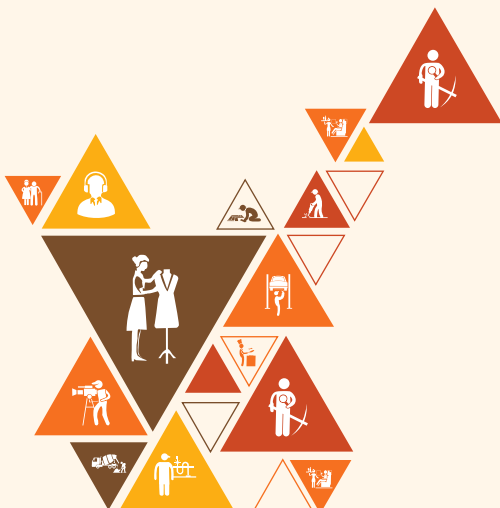
Key Learning Outcomes

By the end of this module, the participants will be able to:

1. Explain the various dangers associated with the use of electrical equipment
2. Demonstrate how to free a person from electrocution
3. Administer appropriate first aid treatment to victims
4. Demonstrate basic techniques of bandaging
5. Respond promptly and appropriately to an accident situation or medical emergency in real or simulated environments
6. Administer first aid to victims in case of a heart attack or cardiac arrest due to electric shock, before the arrival of emergency services in real or simulated cases
7. Demonstrate the artificial respiration and the CPR Process
8. Emergency procedures: raising alarm, safe/efficient, evacuation, correct means of escape, correct assembly point, roll call, correct return to work
9. Complete a written accident/incident report or dictate a report to another person, and send report to person responsible
10. Demonstrate correct method to move injured people and others during an emergency Explain the preventative and remedial actions to be taken in the case of exposure to toxic materials
11. Explain the various types of safety signs and what they mean
12. State potential injuries and ill health associated with incorrect manual handing
13. State safe lifting and carrying practices
14. Explain personal safety, health and dignity issues relating to the movement of a person by others
15. State the potential impact to a person who is moved incorrectly

Unit 14.1: Responding Promptly to Medical Emergencies

Unit Objectives

By the end of this unit, the participants will be able to:

1. Explain various medical emergencies and injuries
2. Demonstrate appropriate first aid techniques as relevant
3. Demonstrate Cardiopulmonary Resuscitation (CPR) procedure

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

This section focuses on demonstrating the techniques of handling emergencies as well as the procedures of providing first aid to an individual. A Recruitment Executive requires to hold the basic knowledge regarding the contents present in a first aid kit, the procedure of CPR and also the various safety signs.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive"

Do

- Start by greeting all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following question:

- What stands to be the process of evacuation?

Elaborate

In this session, discuss the following points:

- Medical emergencies and injuries
- Evacuation procedure

Say

Good morning and welcome back to the program "Office Operations Executive".

Today, we will learn about handling emergencies and first aid.

Activity

Bandaging technique

1. **Objective of the Activity:** To obtain the knowledge of the technique of bandaging.
2. **Materials required: First-aid kit, pair of scissors, participant handbook.**
3. **Steps required:**
   - Ask the participants to imagine that they have a wound on their legs
   - Ask them to refer to the participant handbook and then go about bandaging the foot
   - Check each one's technique
4. **Conclusion drawn:** The activity helps in obtaining the knowledge of the technique of bandaging.

Say

Did you enjoy the activity? It was to learn and pick up the steps required for doing proper bandaging in case of an injury.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 14.2: First Aid Kit and Basic First Aid Procedures

Unit Objectives

By the end of this unit, the participants will be able to:

1. Explain appropriate first aid techniques as relevant
2. Explain Cardiopulmonary Resuscitation (CPR) procedure

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

This unit specifies the significance of a first aid kit and basic first aid procedures.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by greeting all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following question:

- What do you understand by Cardiopulmonary Resuscitation (CPR)?

Elaborate

In this session, discuss the following points:

- First aid kit and basic first aid procedures
- Cardiopulmonary Resuscitation (CPR)

Say 💬

Good morning and welcome back to the program "Office Operations Executive".

Today, we will learn about the significance of a first aid kit and basic first aid procedures.

Activity ⚙️

Practical activity - PPE

1. **Objective of the Activity:** To understand the use of appropriate personal protective equipment compatible with the work and compliant with relevant occupational health and safety guidelines.
2. **Materials required:** Participant handbook, wide screen or laptop, overhead screen, projector, internet connection, various protective equipment etc.
3. **Steps required:**
   - This session will be in the form of "Show and Explain" activity.
   - In this activity, bring a few PPE (relevant to the job role) to the class and demonstrates each of them.
   - To make the session interesting, show the PPE and ask the trainees to identify it.
   - After the session, you will select a few volunteers from the class and makes them wear few PPE.
4. **Conclusion drawn:** The activity helps to select and use appropriate personal protective equipment compatible with the work and compliant with relevant occupational health and safety guidelines.

Say 💬

Did you enjoy the activity? It was to learn the use of appropriate personal protective equipment compatible with the work and compliant with relevant occupational health and safety guidelines.

Notes for Facilitation 📝

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 14.3: Exposure to Toxic Materials

Unit Objectives

By the end of this unit, the participants will be able to:

1. Identify toxic chemical substances
2. Describe various types of health hazards due to exposure to chemical substances and the use of protective equipment

Resources to be Used

Computer, printer, projector, white board/ flip chart, marker, duster, different office equipment (printer, photocopier, scanner, binder, laminator, A/V equipment etc.), Audio visual equipment (could be computer or mobile), LCD projector.

Note

In this unit, we will discuss about the exposure to toxic materials.

Say

Good morning and welcome back to this training program, "Office Operations Executive".

Today we shall learn an important unit regarding the exposure to toxic materials.

Do

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following questions:

- What are the different toxic materials that can harm a workplace?

Elaborate

In this session, discuss the following points:

- Toxic materials

Say

In this activity, participants shall have a Role Play session to understand the material and energy conservation in a Workplace.

Activity

Role Play

1. **Objective of the Activity:** To understand the material and energy conservation in a workplace.
2. **Materials required:** Cordless microphones (if required), Notebook, Pen, Pencil, Eraser, Participant Handbook, Whiteboard, Marker, Overhead projector, White screen, etc.
3. Steps required:
   - Divide the class into four groups.
   - All the groups will enact the roles that you will give them.
   - This role-play session will be based on material and energy conservation in a Workplace
   - Amongst the 4 two groups will showcase the correct energy conservation process
   - The other two groups will showcase the correct processes where material utilization can be optimized
   - You will provide the necessary tools required for the task.
   - The participants who will give the instructions will create a list before the session starts
   - The participants who are giving instruction needs to be loud and clear
   - The participants who are receiving instruction need to listen to all the instructions carefully and act accordingly
   - The group that can complete their task first and accurately will be declared as the winner and appreciated in the class with accolades.
4. **Conclusion drawn:** This activity assists in understand the material and energy conservation in a workplace.

Say

Did you enjoy this activity? It was mainly to focus on the material and energy conservation in a workplace.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 14.4: Safe Lifting and Carrying Practices

Unit Objectives

By the end of this unit, the participants will be able to:

1. Identify the material handling principles
2. Identify the important material handling guidelines

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

This section tends to present the importance of safe lifting and carrying practices.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by greeting all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program.

Ask

Ask the participants the following question:

- What are the principles of material handling?

Elaborate

In this session, discuss the following points:

- Material handling principles
- Important guidelines

Say

Good morning and welcome back to the program "Office Operations Executive".

Today we will learn about the importance of safe lifting and carrying practices.

Activity

Individual Activity

1. **Objective of the Activity: T**o understand the guidelines which are needed to maintain while material handling.
2. **Materials required:** To understand the guidelines which are needed to maintain while material handling.
3. **Steps required:**
   - The students need to make a list on the guidelines which are needed to maintain while material handling.
   - After completion, the students need to come up and discuss that with the class.
   - The trainer then needs to evaluate each student accordingly.
4. **Conclusion drawn:** The activity helps in understanding the guidelines which are needed to maintain while material handling.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

15. Professional Development

Unit 15.1 - Professional Goals and Objectives

Unit 15.2 - Professional Development Plan

Unit 15.3 - Performance Feedback

Unit 15.4 - The Continuous Learning Process

MEP/N9912

Key Learning Outcomes

By the end of this module, the participants will be able to:

1. Define professional goals and objectives
2. Classify goal and objectives into various timeline
3. Explain the importance of developing personal and professional goals and objectives
4. Identify strengths and weaknesses in relation to goals and objectives
5. Evaluate own capacity to meet goals and objectives
6. Determine personal development needs to perform role as per desired standards
7. Develop a professional development plan to enhance professional capabilities
8. Explain the importance of continuous learning and developing professional development plan
9. Explain the importance of taking and using feedback from colleagues and clients for self-improvement and increased work performance

Unit 15.1: Professional Goals and Objectives

Unit Objectives 🎯

By the end of this unit, the participants will be able to:

1. Identify the difference between goals and objectives
2. Classify goal and objectives into various timeline such as short, medium and long-term

Resources to be Used ⚙️

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note 📝

The particular section, tends to provide the illustration on the techniques of building personal as well as professional goals and objectives by an Office Operations Executive.

Say 💬

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do ✓

- Start by greeting all the participants to the training session m and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask 💬

Ask the participants the following question:

- What is the difference between goals and objectives?
- What do you understand by S.M.A.R.T goals?

Elaborate ⚙️

In this session, discuss the following points:

- Difference between goals and objectives
- S.M.A.R.T goals

Say

Good morning and welcome back to the program "Office Operations Executive".

Today, we will discuss personal and professional goals.

Activity

Professional and personal goals

1. **Objective of the Activity: To understand the goals required for both the professional and personal areas.**
2. **Materials (if required):** Participant handbook, pen, paper, etc.
3. **Steps required:**
    *   Ask the participants to develop a personal and professional plan for the next 5 years
    *   Ask them to identify their goals carefully
    *   Ask them to set an objective in order to achieve them
    *   Assess them after every 3 months or so to see where you stand
4. **Conclusion drawn:** The objective helps in understanding the goals required for both the professional and personal areas.while material handling.

Say

Did you like the activity? It was for you to form your personal and professional goals for the next 5 years and set targets for achieving them.

Notes for Facilitation

*   Answer all the queries/ doubts raised by the participants in class
*   Encourage other participants to answer problems

Unit 15.2: Professional Development Plan

Unit Objectives

By the end of this unit, the participants will be able to:

1. Identify strengths and weaknesses in relation to goals and objectives
2. Explain the importance of identifying strengths and weaknesses in relation to goals and objectives
3. Determine personal development needs to perform role as per desired standards
4. Develop a professional development plan to enhance professional capabilities

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

This section tends to present the procedure of structuring a professional development plan for an Office Operations Executive.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by greeting all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following question:

- What are the ways to understand strengths and weaknesses?

Elaborate

In this session, discuss the following points:

- Understanding strengths and weaknesses
- Development plan

Say

Good morning and welcome back to the program "Office Operations Executive".

Today we will learn about Professional Development Plan by conducting an activity.

Activity

Class Room Activity

1. **Objective of the Activity:** To understand the positive outcomes for various situations.
2. **Materials required: P**articipant handbook, notebook/ white board/ marker, etc.
3. **Steps required:**
   - This game works well with older teens and adults. Two players are in a debate. Both players represent the same person, only one is in the midst of hard times and the other is debating from the future. When the first player says "I lost my job, I'm never going to find another one that pays me what I'm worth, this is terrible." The character from the future can say "You found a better job and got paid more."
   - The purpose of the game is to find positive outcomes for situations that may seem negative. Like the saying goes; as one door closes, another one opens.
   - On submission, review and discuss the errors made by individual participants (if any)
   - Allocate marks based on individual performance
4. **Conclusion drawn:** The activity assists in understanding the positive outcomes for various situations.

Say

Did you enjoy this activity? It was focused on the understanding of the positive outcomes for various situations.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 15.3: Performance Feedback

Unit Objectives

By the end of this unit, the participants will be able to:

1. Identify the importance of feedback
2. Explain the levels of feedback

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In this particular section, the usage of the feedback for continuous development has been discussed. An Office Operations Executive requires to have the knowledge of the parameters for evaluating their personal and professional development.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following question:

- What is the importance of feedback for personal development?

Elaborate

In this session, discuss the following points:

- Importance of feedback for personal development

Say 💬

Good morning and welcome back to the program "Office Operations Executive".

Today we will talk about using feedback for continuous development by conducting an activity

Activity ⚙️

Lab Activity

1. **Objective of the Activity:** To understand the ways to develop a survey questionnaire and use them for data collection & feedback taking which will be helpful for individuals' development.

2. **Materials required:** Laptop, Notebook, participant handbook, pen, marker, pen, flipchart, sketch pens, calculator, etc.

3. **Steps required:**
   - Ask the participants to generate a survey sheet using google form which will be used for data collection
   - Ask them to generate a link and share it in their social media pages
   - They can use the responses to generate statistically significant results, using graphs and charts
   - They ask others to provide their opinion for their survey.
   - Ensure no two participants select the same topic for conducting research
   - The purpose of the activity is to find the importance of taking feedback which help for personal development.
   - On submission, review and discuss the errors made by individual participants (if any).
   - Allocate marks based on individual performance.

4. **Conclusion drawn:** This activity assists in understanding the ways to develop a survey questionnaire and use them for data collection & feedback taking which will be helpful for individuals' development.

Say 💬

This activity assists in understanding the ways to develop a survey questionnaire and use them for data collection & feedback taking which will be helpful for individuals' development.

Notes for Facilitation 📝

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 15.4: The Continuous Learning Process

Unit Objectives

By the end of this unit, the participants will be able to:

1. Explain the importance of continuous learning
2. Explain the need of continuous learning for individuals and organization

Resources to be Used

PParticipant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In the specified section, the continuous learning process for the role of an Office Operations Executive has been discussed.

Say

Good morning, participants and a warm welcome to this training program called "Office Operations Executive".

Do

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program
- Introduce yourself briefly to participants, your name and background, and your role in the training program
- Explain the rules of the game

Ask

Ask the participants the following question:

- What are the benefits for continuous learning?

Elaborate

In this session, discuss the following points:

- The need for continuous learning and its benefits

Say

Good morning and welcome back to the program "Office Operations Executive".

Today we will discuss the continuous learning process for the role of an Office Operations Executive.

Activity

'Gap fill in' activity

1. **Objective of the Activity:** To understand the concept of time management.
2. **Materials required:** A large private room, a picture, preferably newspaper cut of which facilitator have clear idea behind it, blank paper, other stationary items.
3. **Steps required:**
   - Participants are shown a picture, projected in the front of the room, if possible.
   - Ask them to have a clear look on the picture.
   - Now each participant is provided with a blank paper and asks them to write at the top of their paper "What is happening in this picture?"
   - At the bottom of the page, they should answer (very simply, in 1-2 sentences) with what they believe is happening in the photo.
   - In the middle of the page students write down all of the steps they took to arrive at that answer. Students are encouraged to write down the evidence they see that supports their conclusion. On limited time frame
   - Ask each participant to share their views on the picture and how they came to that conclusion. Check how many of them are close to the actual story.
   - Now share the actual story behind the picture to all participants.
4. **Conclusion drawn:** This activity helps in understanding the concept of time management.

Say

Did you enjoy this activity? It was mainly to concentrate on the concept of time management.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

16. Professional Practice

Unit 16.1 - Professional Appearance and Behaviour

Unit 16.2 - Organisational Policies and Rights

Unit 16.3 - Executing Duties within the Required Timeframe

Key Learning Outcomes

By the end of this module, the participants will be able to:

1. Display appropriate professional appearance for the workplace
2. Interact with team members, clients, vendors, visitors and other stakeholders in a Professional manner
3. Perform tasks to the required workplace standard.
4. Complete duties accurately, systematically and within required timeframes
5. Follow organizational policies while carrying out tasks
6. Protect the rights of the client and organization when delivering services
7. State the nature of rights that clients and organizations have
8. Explain the importance of discipline and ethics in a professional workplace
9. Identify and obtain clarity regarding organizational, team and own goals
10. Prioritize tasks at work as per organizational, team and own goals

Unit 16.1: Professional Appearance and Behaviour

Unit Objectives

By the end of this unit, the participants will be able to:

1. Identify importance of appropriate workplace appearance
2. Explain the need for work ethics

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In this unit, we will discuss about the professional appearance and behaviour that needs to be maintained by an Office Operations Executive.

Say

Good morning and welcome back to this training program, "Office Operations Executive". Today we shall learn an important unit regarding the professional appearance and behaviour that needs to be maintained by an Office Operations Executive.

Do

- Start by welcoming all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this training program

Ask

Ask the participants the following questions:

- What is the professional appearance and professionalism that needs to be maintained by an Office Operations Executive?

Elaborate

In this session, we will discuss the following point:

• Professional appearance and professionalism
• Work ethics

Say

Good morning and welcome back to the program "Office Operations Executive".

Today we will discuss regarding the professional appearance and behaviour that needs to be maintained by an Office Operations Executive.

Activity

Group discussion

1. **Objective of the Activity:** To understand the concept of ethical as well as unethical behaviour at the workplace.
2. **Materials required:** Participant handbook, wide screen or laptop, overhead screen, projector, internet connection, etc.
3. **Steps required:**
   • Divide the class into two groups
   • Conduct a group discussion in the class on Ethical and Unethical Behaviours at the Workplace.
   • Ask the participants what they have learnt from this exercise
   • Ask if they have any questions related to what they have talked about so far
   • Close the discussion by summarising the importance of looking at footages and pass on the message to the on-field security guards
4. **Conclusion drawn:** This activity assists in understanding the concept of ethical as well as unethical behaviour at the workplace.

Say

Did you enjoy this activity? It was mainly to concentrate on understanding of the concept of ethical as well as unethical behaviour at the workplace.

Notes for Facilitation

• Answer all the queries/ doubts raised by the participants in class
• Encourage other participants to answer problems

Unit 16.2: Organisational Policies and Rights

Unit Objectives 🎯

By the end of this unit, the participants will be able to:

1. Discuss organisations policies
2. Explain the basics of professional practice

Resources to be Used ⚙️

Participant Handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools proper business etiquette when dealing with visitors and clients.

Note 📝

In this unit, we will discuss regarding the organisation policies and rights.

Say 💬

Good morning and welcome back to this training program, "Office Operations Executive".

Today we shall learn an important unit guideline on the organisation policies and rights.

Do ✓

- Start by greeting all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this session of training
- Make the concept illustrative while the session and also try and make it interesting

Ask 💬

Ask the participants the following question:

- What are the organisational policies that need to be followed by an Office Operations Executive?

Elaborate ⚙️

In this session, discuss the following points:

- Understanding organisational policies

Say

Good morning and welcome back to the program "Office Operations Executive".

Today we will learn regarding the organisation policies and rights.

Activity

Role Play - on Greeting Visitors and Clients

1. **Objective of the Activity:** To understand the rights of clients.
2. **Materials required:** Cordless microphones (if required), notebook, pen, pencil, eraser, participant handbook, whiteboard, marker, overhead projector, white screen, etc.
3. **Steps required:**
   - Divide the class into four groups.
   - All the groups will enact the roles that you will give them.
   - This role-play session will be based on Rights of Clients
   - Amongst the 4 two groups will showcase the correct communication procedures while talking to steak holders
   - The other two groups will showcase the correct communication procedures on Confidentiality of Personal Information
   - You will provide the necessary tools required for the task.
   - The participants who will give the instructions will create a list before the session starts
   - The participants who are giving instruction needs to be loud and clear
   - The participants who are receiving instruction need to listen to all the instructions carefully and act accordingly
   - The group that can complete their task first and accurately will be declared as the winner and appreciated in the class with accolades.
- **Conclusion drawn:** This activity assists in understand the rights of clients.

Say

Did you like the videos? It was to teach you the organisation policies and rights.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

Unit 16.3: Executing Duties within the Required Timeframe

Unit Objectives

By the end of this unit, the participants will be able to:

1. Gain an understanding of the concept of time management
2. Discuss the difference between time management and time utilization
3. Learn the importance of meeting deadlines
4. Practice handling grievances in time

Resources to be Used

Participant handbook, pen, writing pad, whiteboard, flipchart, markers, laptop, overhead projector, laser pointer, equipment and tools.

Note

In this unit, we will demonstrate importance of proper time management.

Say

Good morning and welcome back to this training program, "Office Operations Executive". Today we shall learn an important unit regarding importance of proper time management.

Do

- Start by greeting all the participants to the training program and conveying a message of encouragement.
- Thank all the participants for joining and being a part of this session of training

Ask

Ask the participants the following questions:

- What is time management?
- What stands to be the importance of meeting deadlines as a team?

Elaborate

Ask the participants the following questions:

- Time management
- Importance of meeting deadlines as a team

Say

Good morning and welcome back to the program "Office Operations Executive".

Today we will learn about dealing with the importance of proper time management.

Activity

Making of a Timeline

1. **Objective of the Activity:** To understand the importance of time management
2. **Materials required:** Participant handbook, pen, notebook, etc.
3. **Steps required:**
   - The students are required to make a timeline for their day-to-day activities
   - They need to keep each activity in a balanced manner to get the outcome in an efficient manner
   - After completion, they need to present their timeline in front of the class.
   - The trainer needs to assess them accordingly.
4. **Conclusion drawn:** : The activity helps in understanding the importance of time management.

Say

Did you enjoy this activity? It was mainly to concentrate on the concept of time management.

Notes for Facilitation

- Answer all the queries/ doubts raised by the participants in class
- Encourage other participants to answer problems

17. Employability Skills

DGT/VSQ/N0102

Scan the QR codes or click on the link for the e-books

https://eskillindia.org/NewEmployability

18. Annexures

Annexure I: Training Delivery Plan

Annexure II: Assessment Criteria
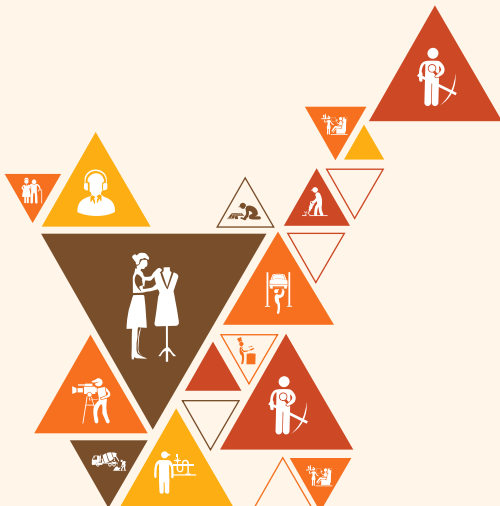
Annexure I

Training Delivery Plan

Training Delivery Plan				
Program Name:	Office Operations Executive			
Qualification Pack Name & Ref. ID	MEP/Q0207, v1.0			
Version No.	1.0		**Version Update Date**	04/09/2018
Pre-requisites to Training (if any)	12th standard passed or equivalent, 18 years old			
Training Outcomes	**After completing this program, the participants will be able to:** 1. Check forms and applications for completeness as per norms. 2. Managing routine office activities. 3. Co-ordinate with internal and external agencies to complete operational requirements. 4. Use computers to store, retrieve and communicate information. 5. Communicate with clients, visitors and colleagues effectively. 6. Apply health and safety practices at the workplace. 7. Apply principles of professional practice at the workplace.			

SL	Module Name	Session Name	Session Objectives	NOS	Methodology	Training Tools/Aids	Duration (hours)
1	**Introduction**	**Introduction to the job role of Office Operations Executive**	• Describe various types of organisations and their purpose. • Explain organisation structure and various functions carried out in an organisation. • Describe organization's departments, hierarchy, products, services. • Explain common policies, and procedures followed in organisations relevant to employment and performance conditions.	Bridge Module	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training kit (Trainer guide, PowerPoint)	2 Theory (2:00) Practical (0:00)

			• Explain why it is important for all employees to abide by and follow organisation policy and procedures. • Describe the hierarchy of communication in an organisation.				
2	**Check forms and applications for completeness as per norms**	**Process of application form and documenta-tion**	• State the various types of forms, applications and files that may need to be checked in an organisation • Identify applicable norms and guidelines for checking the forms or applications • Undertake agreed procedural action when applications are unacceptable • Explain the measures that can be taken to protect physical and digital documents from damage or loss • Explain the importance of Information security and safety measures that can be taken to protect documents and the information they contain from unauthorised access • Explain the various parameters on which forms and applications may require checking	PC 1, PC 2, PC 3, PC 4, PC 7, PC 8, PC 9 KU 4, KU 5, KU 7, KU 8	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (Pow-erPoint, Trainer Guide), house-keeping equipment, health and safety guidelines	6 Theory (2:00) Practical (4:00)

			• Handover the documents after checking and marking for further processing to the authorised personnel as per instructions • Explain the measures that can be taken to protect documents from damage				
		Technological factors involved in the process of documentation	• Explain the various parameters on which forms and applications may require checking • Apply procedures for coding, entering, storing, retrieving and communicating data manually and using a computer • Verify correctness and completeness of all the data entered and adherence to instructions	PC 5, PC 12, PC 13, PC 14, PC 15, PC 16 KU 3, KU 6, KU 10, KU 12, KU 16	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (PowerPoint, Trainer Guide), housekeeping equipment, health and safety guidelines	6 Theory (2:00) Practical (4:00)
		Security standards to be followed during the documentation process	• Ensure entries are made in a legible and presentable format • Explain the various parameters on which forms and applications may require checking • Explain the various parameters on which forms and applications may require checking • Undertake agreed procedural action when applications are unacceptable • Maintain workplace confidentiality standards	PC 6, PC 10, PC 11, PC17 KU 11, KU 13, KU 14, KU 9. KU 15	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (PowerPoint, Trainer Guide), housekeeping equipment, health and safety guidelines	6 Theory (2:00) Practical (4:00)

3	Workplace Related Routine Texts and Correspondence	Various types of workplace texts and correspondence	• Describe the various types of workplace texts and correspondence • Explain business communication and basic numeracy • Demonstrate business writing skills • Describe writing strategies to complete routine formal workplace texts • Use drafting strategies to write formal text, efficiently • Explain grammar and vocabulary for routine formal workplace texts • Explain grammar and vocabulary for routine formal workplace texts	PC 15	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (PowerPoint, Trainer Guide), housekeeping equipment, health and safety guidelines	7 Theory (3:00) Practical (4:00)
		Reviewing and revising various drafting processes	• Review a draft text to identify errors and scope for improvement for achieving accuracy • Revise and finalise text to achieve professional standards of written communication as per organisation protocols • Review a draft text to identify errors and scope for improvement, to achieve better accuracy, and adherence to professional protocols for effective communication	PC 14 KU 8, KU 14	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (PowerPoint, Trainer Guide), sample quotations, sample vendor agreements	7 Theory (3:00) Practical (4:00)

			• Revise and finalise text to achieve professional standards of written communication as per organisation protocols.				
		Writing skills	• Write simple emails and letters using the right form of address and starting and ending correctly • Explain business letter writing principles • Make routine written enquiries, requests and invitations politely as per professional protocols • Write routine instructions or advice, accurately • Write accurately using correct grammar, familiar words and language structures to convey a professional impression on the reader • Explain routine numerical terms in figures and word, including roman numerals	PC 12, KU 12	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (PowerPoint, Trainer Guide), sample quotations, sample vendor agreements	7 Theory (3:00) Practical (4:00)
4	**Receive and make phone calls**	**Communication with stakeholders**	• Attend to phone calls of various stakeholders and channelize them to appropriate authority • Greet callers and verify their details, following your organization's procedures over the phone or face to face	PC 1, PC 2 KU 13	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (PowerPoint, Trainer Guide), sample quotations, sample vendor agreements	6 Theory (2:00) Practical (4:00)

		Adhering to the standards and policies of the organisation	• Comply with relevant standards, policies, procedures and guidelines when dealing remotely with queries • Listen carefully to callers/visitors and ask appropriate questions to understand the nature of queries • Resolve queries within your area of competence or authority in line with organizational standards	PC 3, PC 4, PC 9 KU 1	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (PowerPoint, Trainer Guide), sample quotations, sample vendor agreements	6 Theory (2:00) Practical (4:00)
		Gathering experience as per various communication understanding	• Summarise and obtain confirmation of, your understanding of queries • Refer queries outside your area of competence or authority promptly to appropriate people • Access your organization's knowledge base for solutions to queries, where available	PC 5, PC 6, PC 7, PC 8 KU 3, KU 4, KU 7	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training kit (Trainer guide, PowerPoint), safety guidelines, sample stock register, inventory register	6 Theory (2:00) Practical (4:00)
5	Prepare to coordinate work tasks	Various operational activities and requirements	• State various categories of operational activities that require coordination with different agencies and people • State various types of operational requirements in an office environment	PC 1, PC 2, PC 3	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training kit (Trainer guide, PowerPoint), safety guidelines, sample stock register, inventory register	7 Theory (3:00) Practical (4:00)

			• Explain the importance of obtaining complete details about the requirement • Identify relevant personnel and agencies involved and obtain their contact details				
		Prepara-tion and importance of a work plan and schedule	• Explain how to prepare a work plan and schedule • Prepare efficient to-do lists and work plans and share them with relevant people • Set-up and check voice and video communication tools and applications effectively, prior to making calls	PC 5, PC 6	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training kit (Trainer guide, Pow-erPoint), safety guidelines, sample stock register, inventory register	7 Theory (3:00) Practical (4:00)
		Usage of schedules for various activities	• Prepare schedules, set reminders and flag task items according to sequence and importance using calendars and planners • Describe how to book appointments and schedule web and phone calls, sending e-invites and relevant instructions	PC 4, PC 7, PC 8, PC 9	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (Pow-erPoint, Trainer Guide)	6 Theory (2:00) Practical (4:00)
6	**Execute follow-up activities and build good relations**	**Workplace Collabora-tion**	• Discuss various modes of communication for workplace collaboration • State features, benefits and limitations of different collaborative technology tools and devices	PC 10, PC 11, PC 12, PC 13, PC 14, PC 25	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (Pow-erPoint, Trainer Guide)	7 Theory (3:00) Practical (4:00)

			• Record response obtained as per standard operating procedure • Follow organisation process for claiming allowed re-imbursements				
		Transaction with the vendors	• Negotiate with vendors to get optimum value for money as possible • Register the vendor in co-ordination with finance team as per organisational norms • Check bills and invoices to ensure that they are correct as per the products/services purchased or sold respectively • Perform common banking transactions	PC 15, PC 16, PC 17, PC 20, PC 21, PC 22, PC 23, PC 24, PC 26	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training kit (Trainer guide, Pow-erPoint), travel plan format	7 Theory (3:00) Practical (4:00)
		Organisa-tional eti-quettes and netiquettes	• Describe the need of etiquette and netiquette with internal and external customers • Explain importance of effective and timely follow-up for achievement of goals and targets	PC 18, PC 19, PC 33, PC 34, PC 35, PC 36, PC 37	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training kit (Trainer guide, Pow-erPoint), travel plan format	6 Theory (2:00) Practical (4:00)
7	**Process documents**	**Data and information**	• Identify the difference between data and information and the need for data security • Identify the difference between data and information and the need for data security	PC 27, PC 28	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training kit (Trainer guide, Pow-erPoint), travel plan format	5 Theory (2:00) Practical (3:00)

			• Explain the process for receiving, acknowledging and recording incoming documentation • Explain the importance of checking documentation thoroughly before processing • Explain the need for maintaining records of outgoing documentation				
		Authorising procedure for documentation	• Identify actions that need to be undertaken and related parameters, by interpreting information on documentation received, accurately • Explain the need for checking for authorisation effectively, before sending or sharing any documentation to any person or firm agency requesting for information • Take necessary and timely back-ups for essential documentation to avoid loss due to exigencies	PC 31, PC 32	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training kit (Trainer guide, PowerPoint), travel plan format	5 Theory (2:00) Practical (3:00)
8	**Maintain office related records and documentation**	**Maintenance of office documents**	• Explain how to maintain office records by using the various record-keeping techniques • Manage, record paper files/ computer according to business and legal requirements	PC 14, PC 17, PC 18, PC 19, PC 20	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training kit (Trainer guide, PowerPoint), travel plan format	7 Theory (3:00) Practical (4:00)

			• Maintain filing system for essential correspondences, vendor rate cards/ contracts, office administration related documents and specific documentation given by authorised persons for filing • Maintain filing system for essential correspondences, vendor rate cards/ contracts, office administration related documents and specific documentation given by authorised persons for filing • Maintain staff birthday's, list of holidays as well as important dates for the whole organisation and share with staff. • File documents and develop or modify filing practices • Check the files for primary classification, series record, indexing or labelling • Track movement of files/records				
		Manage-ment of office docu-ments	• Coordinate with various stakeholders and organize meetings • Prepare draft notice, agenda and minutes of meeting	PC 21, PC 22	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training kit (Trainer guide, Pow-erPoint), travel plan format	7 Theory (3:00) Practical (4:00)

			• Seek clarification and confirmation from work supervisor, when necessary, to ensure the work is correctly documented • Ensure that documents and information can be retrieve from the filing system smoothly and easily • Ensure that documents and information can be retrieve from the filing system smoothly and easily • Maintain a record of all the files being maintained and take inventory periodically to ensure that all the files are accounted for • Take measures to ensure that the documents are safety stored and secured in a risk-free environment				
9	**Use computers to store, retrieve and communicate information**	**Compo-nents and usage of a computer in an organisa-tion**	• Explain the main components of a computer and how to set up a computer • Explain the main components of a computer and how to set up a computer • List various operating systems commonly used by organisations for their computers	PC 1, PC 2, PC 4, PC 5, PC 6, PC 16 KU 7, KU 8, KU 9, KU 10, KU 11, KU 18	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training kit (Trainer guide, Pow-erPoint), travel plan format	7 Theory (3:00) Practical (4:00)

			• Demonstrate how to navigate computer drives, directories, folders and software applications to access specified file locations • List the various types of printers and their features				
		Various software applications used in an organisa-tion	• List various application software used in organisations to store, retrieve and communicate information • Perform data entry, editing, storage, designing, formatting, referencing, and reviewing activities in a word-processor application • Perform data entry, editing, storage, designing, formatting, referencing, and reviewing activities in a word-processor application • Explain how to input, edit and save specified data or information using a spreadsheet application • List various email applications used in organisations • Explain professional email etiquette and its various elements	PC 3, PC 7, PC 8, PC 9, PC 10, PC 11, PC 12, PC 12, PC 13, PC 17, PC 18 KU 2, KU 5, KU 6, KU 12, KU 14, KU 15, KU 17, KU 19, KU 20	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (Pow-erPoint, Trainer Guide), packing material	7 Theory (3:00) Practical (4:00)

		Ergonomic tips for computer users	• Explain the various electrical safety precautions one should follow while using computers and related equipment which use electricity to run • Explain ergonomic guidelines specified for working on computers and other similar devices. • Describe Cybersecurity guidelines to be followed while storing, retrieving or communicating information online (through the internet) and its importance • Describe Cybersecurity guidelines to be followed while storing, retrieving or communicating information online (through the internet) and its importance	PC 19, PC 20, PC 21, PC 22 KU 1, KU 21, KU 22, KU 23, KU 24	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (PowerPoint, Trainer Guide), packing material	6 Theory (2:00) Practical (4:00)
10	**Communicating with Colleagues (Seniors, Peers and Subordinates)**	**Job related requirements to enhance performance**	• Identify job related requirements, performance indicators and incentives by seeking clarification from reporting superior • Identify job related requirements, performance indicators and incentives by seeking clarification from reporting superior	PC 1, PC 2, PC 3, PC 4, PC 5, PC 6, PC 7, PC 8, PC 9, PC 10	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (PowerPoint, Trainer Guide), computer systems – latest configuration, printer	7 Theory (3:00) Practical (4:00)

			• Seek and receive feedback on performance output and quality • Receive information and instructions from colleagues accurately getting clarification where required • Accurately pass on information to authorized persons who require it and within agreed timescale and confirm its receipt • Give information to others clearly, at a pace and in a manner that helps them to understand • State the common reasons for interpersonal conflict • Explain the importance of developing effective working relationships for professional success • Describe how to express and address grievances appropriately and effectively • Explain the importance and ways of managing interpersonal conflict effectively • Explain the importance of dealing with grievances effectively and in time				

			• Escalate grievances and problems to appropriate authority as per procedure to resolve them and avoid conflict • Explain the importance of teamwork in organizational and individual success • Display helpful behaviour by assisting others in performing tasks in a positive manner, where required and possible • Consult with and assist others to maximize effectiveness and efficiency in carrying out tasks				
		Skills re-quired to be professional in an organ-isation	• State the various components of effective communication • Explain the importance of effective communication in the workplace • Display appropriate communication etiquette while working. Communication etiquette: do not use abusive language; use appropriate titles and terms of respect; do not eat or chew while talking (vice versa) etc. • Explain the key elements of active listening	PC 11, PC 12, PC 13, PC 14, PC 15, PC 16, PC 17, PC 18, PC 19	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (Pow-erPoint, Trainer Guide), computer systems – latest con-figuration, printer	7 Theory (3:00) Practical (4:00)

			• Display active listening skills while interacting with others at work • Explain the value and importance of active listening and assertive communication • Explain the barriers to effective communication • Explain the importance of tone and pitch in effective communication and how to use it • Use appropriate tone, pitch and language to convey politeness, assertiveness, care and professionalism • Demonstrate responsible and disciplined behaviors at the workplace. Disciplined behaviors: e.g., Punctuality; completing tasks as per given time and standards; not gossiping and idling time; eliminating waste, honesty, etc. Interact with colleagues from different functions clearly and effectively on all aspects to carry out the work among the team and understand the nature of their work				

			• Demonstrate responsible and disciplined behaviors at the workplace. Disciplined behaviors: e.g., Punctuality; completing tasks as per given time and standards; not gossiping and idling time; eliminating waste, honesty, etc. Interact with colleagues from different functions clearly and effectively on all aspects to carry out the work among the team and understand the nature of their work • Describe how poor communication practices can disturb people, environment and cause problems for the employee, the employer and the customer • Describe how poor communication practices can disturb people, environment and cause problems for the employee, the employer and the customer • Explain the importance of discipline for professional success • Explain the importance of discipline for professional success				

| 11 | Communicating with Clients and Visitors | Handling the customers and visitors | • Describe proper meeting and greeting techniques
• Demonstrate proper body language, dress code, gestures and etiquettes towards the customers
• Demonstrate clear verbal communication and active listening
• Explain how to avoid negative questions and statements to the customers
• Explain how to provide clear and accurate information to visitors as per their requirement while following organisation policies for information access and confidentiality
• Demonstrate how to respond to the customer immediately for their voice messages, e-mails, etc.
• Demonstrate how to respond to the customer immediately for their voice messages, e-mails, etc. | PC 20, PC 21, PC 22, PC 23, PC 24, Pc 25, Pc 26, PC 27 | Classroom lecture/ PowerPoint Presentation/ Question and Answer | Training Kit (PowerPoint, Trainer Guide), computer systems – latest configuration, printer | 8 Theory (3:00) Practical (4:00) |
| | | Gender Sensitivity | • Demonstrate sensitivity towards gender, cultural and social differences such as modes of greeting, formality, etc. | | Classroom lecture/ PowerPoint Presentation/ Question and Answer | Training Kit (PowerPoint, Trainer Guide), computer systems – latest configuration, printer | 8 Theory (3:00) Practical (4:00) |

12	Workplace safety	Work place hazards and safety	• Explain the meaning of "hazards" and "risks". • State the health and safety hazards commonly present in the work environment and related precautions. • Explain possible causes of risk, hazard or accident in the workplace which include physical actions; inattention; sickness and incapacity (e.g., due to drunkenness); health hazards (e.g., due to untreated injuries and contagious illness). • Explain the methods of accident prevention such as training in health and safety procedures; using health and safety procedures; use of equipment and working practices (such as safe carrying procedures); safety notices, advice; instruction from colleagues and supervisors. • State safe working practices when working with tools and machines. • State safe working practices while working at various hazardous sites.	PC 1	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (PowerPoint, Trainer Guide), general Personal Protective Equipment, safety instruction charts	5 Theory (2:00) Practical (3:00)

			• State where to find all the general health and safety equipment in the workplace.				
		Using Personal Protective Equipment and reporting hazards	• Identify, control and report health and safety issues relating to immediate work environment according to procedures. • Work safely and apply health and safety practices in the training and assessment environment including using appropriate personal protective equipment (PPE) where required. • Explain the importance of using protective clothing/ equipment while working • Follow procedures and instructions for dealing with hazards, within the scope of responsibilities and competencies. • Document and report all hazards, accidents and near miss incidents as per set process. • Document safety records according to organisational policies. • Maintain the work area in a clean and tidy condition. • Maintain personal hygiene • Report hygiene related concerns to the relevant authority.	PC 2, PC 3, PC 4, PC 5, PC 6, PC 7, PC 8	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (PowerPoint, Trainer Guide), general Personal Protective Equipment, safety instruction charts	5 Theory (2:00) Practical (3:00)

13	**Fire Safety**	**Different types of fire**	• Use the various appropriate fire extinguishers on different types of fires correctly, which includes class A, B, C and D. • Demonstrate rescue techniques applied during fire hazard. • Explain the precautionary activities to prevent the fire accident. List various causes of fire such as heating of metal; spontaneous ignition; sparking; electrical heating; loose fires (smoking, welding, etc.); chemical fires; etc.	PC 19, PC 20,	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (Pow-erPoint, Trainer Guide) Class A, B, C, and D Fire extin-guisher	5 Theory (2:00) Practical (3:00)
		Using differ-ent types of fire extin-guishers	• Describe the techniques of using the different fire extinguishers • State the different methods of extinguishing fire. • State the different materials used for extinguishing fire such as sand, water, foam, CO_2, dry powder. • Explain rescue techniques applied during a fire hazard. • Demonstrate good housekeeping in order to prevent fire hazards. • Demonstrate the correct use of a fire extinguisher.	PC 21, PC 22	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (Pow-erPoint, Trainer Guide) Class A, B, C, and D Fire extin-guisher	5 Theory (2:00) Practical (3:00)

| 14 | Emergency, Rescue and First Aid | Dangers associates with electrical equipment | • Explain the various dangers associated with the use of electrical equipment
• Demonstrate how to free a person from electrocution. Administer appropriate first aid to victims wherever required e.g., in case of bleeding, burns, choking, electric shock, poisoning etc.
• Demonstrate basic techniques of bandaging.
• Respond promptly and appropriately to an accident situation or medical emergency in real or simulated environments.
• Perform and organize loss minimization or rescue activity during an accident in real or simulated environments.
• Administer first aid to victims in case of a heart attack or cardiac arrest due to electric shock, before the arrival of emergency services in real or simulated cases.v | PC 9, PC 10, PC 11, PC 12, PC 13, PC 14, PC 15 | Classroom lecture/ PowerPoint Presentation/ Question and Answer | Training Kit (PowerPoint, Trainer Guide) First aid kit with all necessary contents, sample accident and incident reports, ventilation masks, safety instruction charts | 5 Theory (2:00) Practical (3:00) |

			• Describe the appropriate basic first aid treatment relevant to the condition e.g., Shock, electrical shock, bleeding, fractures, minor burns, resuscitation, poisoning, eye injuries • Demonstrate the artificial respiration and the CPR process				
		Emergency rescue and first aids	• Participate in emergency procedures, which include raising alarm, safe/efficient, evacuation, correct means of escape, correct assembly point, roll call, and correct return to work. • Complete a written accident/incident report or dictate a report to another person and send report to person responsible. • Demonstrate correct method to move injured people and others during an emergency. • Explain the preventative and remedial actions to be taken in the case of exposure to toxic materials. • Explain the various types of safety signs and what they mean.	PC 16, PC 17	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (PowerPoint, Trainer Guide)	5 Theory (2:00) Practical (3:00)

			• State the content of written accident report and its purpose. • State potential injuries and ill health associated with incorrect manual handing. • State safe lifting and carrying practices • Explain personal safety, health and dignity isues relating to the movement of a person by others. • State the potential impact to a person who is moved incorrectly.				
15	**Professional Development**	**Professional goals and objectives**	• Define professional goals and objectives • Classify goal and objectives into various timeline • Explain the importance of developing personal and professional goals and objectives • Identify strengths and weaknesses in relation to goals and objective • Evaluate own capacity to meet goals and objectives	PC 3, PC 4, PC 5	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (PowerPoint, Trainer Guide)	7 Theory (3:00) Practical (4:00)
		Importance of personal development	• Determine personal development needs to perform role as per desired standards	PC 6	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (PowerPoint, Trainer Guide)	7 Theory (3:00) Practical (4:00)
		Importance of professional development	• Develop a professional development plan to enhance professional capabilities	PC 7	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (PowerPoint, Trainer Guide)	6 Theory (2:00) Practical (4:00)

		Significance of various skill set and usage of feedbacks	• Explain the importance of continuous learning and developing professional development plan • Explain the importance of taking and using feedback from colleagues and clients for self-improvement and increased work performance	PC 9, PC 10, PC 11, PC 12	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (Pow-erPoint, Trainer Guide)	5 Theory (2:00) Practical (3:00)
16	Professional Practice	Professional mainte-nance in the workplace	• Display appropriate professional appearance for the workplace • Display appropriate professional appearance for the workplace • Perform tasks to the required workplace standard. • Complete duties accurately, systematically and within required timeframes • Follow organisational policies while carrying out tasks	PC 1, PC 15, PC 27, PC 28, PC 29, PC 3	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (Pow-erPoint, Trainer Guide)	7 Theory (3:00) Practical (4:00)
		Rights of the clients	• Protect the rights of the client and organisation when delivering service • Follow organisational policies while carrying out tasks	PC 14, PC 16, PC 17	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (Pow-erPoint, Trainer Guide)	7 Theory (3:00) Practical (4:00)

		Organi-sational teams and their goals	• Identify and obtain clarity regarding organisational, team and own goals • Prioritise tasks at work as per organisational, team and own goals	PC 13, PC 23, PC 24, PC 25	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (Pow-erPoint, Trainer Guide)	6 Theory (2:00) Practical (4:00)
		Importance of discipline and ethics	• Explain the importance of discipline and ethics in a professional workplace	PC 18, PC 19, PC 20, PC 21	Classroom lecture/ PowerPoint Presentation/ Question and Answer	Training Kit (Pow-erPoint, Trainer Guide)	5 Theory (2:00) Practical (3:00)
Total							**Total Duration 252:00** **Theory Duration 102:00** **Practical Duration 150:00**

Annexure II

Assessment Criteria

CRITERIA FOR ASSESSMENT OF TRAINEES

Assessment Criteria for Office Operations Executive	
Job Role	Office Operations Executive
Qualification Pack	MEP/Q0207, V2.0
Sector Skill Council	Management & Entrepreneurship and Professional Skills Council

S. No.	Guidelines for Assessment
1	Criteria for assessment for each Qualification Pack will be created by the Sector Skill Council. Each Performance Criteria (PC) (PC) will be assigned marks proportional to its importance in NOS. SSC will also lay down proportion of marks for Theory and Skills Practical for each PC.
2	The assessment for the theory part will be based on knowledge bank of questions created by the SSC.
3	Individual assessment agencies will create unique question papers for theory part for each candidate at each examination/training center (as per assessment criteria below).
4	Individual assessment agencies will create unique evaluations for skill practical for every student at each examination/ training center based on these criteria.
5	In case of successfully passing only certain number of NOSs, the trainee is eligible to take subsequent assessment on the balance NOS's to pass the Qualification Pack.
6	In case of unsuccessful completion, the trainee may seek reassessment on the Qualification Pack

Assessable Outcomes	Assessment Criteria for Outcomes	Total Mark	Marks Allocation	
			Theory	Skills Practical
MEP/N0204: Managing routine office activities	PC1. attend to phone calls of various stakeholders and channelize them to appropriate authority	100	1	3
	PC2. greet callers/visitors and verify their details, following your organizations procedures over phone or face to face		1	3
	PC3. comply with relevant standards, policies, procedures and guidelines when dealing remotely with queries		1	3
	PC4. listen carefully to callers/visitors and ask appropriate questions to understand the nature of queries		1	3
	PC5. summarize, and obtain confirmation of, your understanding of queries		2	3
	PC6. express your concern for any difficulties caused and your commitment to resolving queries		2	3
	PC7. refer queries outside your area of competence or authority promptly to appropriate people		2	3
	PC8. access your organizations knowledge base for solutions to queries, where available		2	3
	PC9. resolve queries within your area of competence or authority in line with organizational standards		2	3

	PC10. dress-up appropriately and neatly as per the corporate culture		2	3
	PC11. maintain personal hygiene by keeping self- neat and clean in terms on nails, hair style, teeth etc.		2	3
	PC12. use the right behavior to strengthen codes which stress the value of poise, grace and dignity		2	3
	PC13. ensure visitors are positively engaged while maintaining decorum		2	3
	PC14. prepare computer generated reports and letters		2	3
	PC15. use accurate grammar, spelling and punctuation while drafting/ formatting reports/letters/email		2	3
	PC16. compose, format, forward/send and print email messages		2	3
	PC17. file documents and develop or modify filing practices		2	3
	PC18. check the files for primary classification, series record, indexing or labeling		2	3
	PC19. manage, record paper files/computer according to business and legal requirements		2	2
	PC20. track movement of files/records		2	1
	PC21. coordinate, organize meetings		2	2
	PC22. prepare draft notice, agenda and minutes of meeting		2	1
			40	**60**
MEP/N0216: Use computers to store, retrieve and communicate information	PC1. setup main components of a computer correctly and start it correctly, in a safe		2	2
	PC2. operate the computer to access data and information on it and through it as per authorised privileges		2	2
	PC3. identify the operating system, information storage system and applications/software used for data storage and retrieval		2	2
	PC4. navigate computer drives, directories, folders and software applications to access specified file locations		2	2
	PC5. search for specified file types, files and data within the files using search option		1	3
	PC6. access specified data or information using specified organisational application software		1	3
	PC7. follow the organisational access control and data security policies to access data and information		1	3
	PC8. input, edit and save specified data or information in the form of letter, report or table using word-processor and spreadsheet applications	100	2	2
	PC9. perform basic designing, formatting, referencing and reviewing activities in a word- processer application as specified for the presentation of information		2	2
	PC10. input, edit and save specified data or information using spreadsheet application		2	3
	PC11. use basic formulas and data tools and techniques for presenting the data as specified using spreadsheet application		1	3
	PC12. search for information using the internet and save in the computer following organisational guidelines and data security norms		2	3
	PC13. follow organisational policy for naming stored files, maintaining backups and version control		2	3

	PC14. share information as per organisational data security and confidentiality policy	2	3
	PC15. share information using presentation software as per specifications	2	3
	PC16. share information from computers using printed letters, reports or data sheets as specified	2	3
	PC17. communicate information using email applications as per organisational access control policy while following data security norms	2	3
	PC18. write emails following professional email etiquettes and organisational guidelines	2	3
	PC19. follow electrical safety precautions while using computers which use electricity to run	2	3
	PC20. follow ergonomic guidelines specified for working on computers	2	3
	PC21. follow cyber security guidelines while storing, retrieving or communicating information online (through the internet)	2	3
	PC22. seek assistance of IT helpdesk available as per organisational policy in case of computer related problems	2	3
		40	**60**
MEP/N0224: Check forms and applications for completeness as per norms	PC1. obtain clarification on guidelines or norms for checking the forms or applications from authorised person	2	3
	PC2. prepare a checklist based on the guidelines received for checking the forms or applications and obtain approval on checklist from authorised person	2	5
	PC3. follow organisational process for receipt of forms or applications	2	3
	PC4. check that all the required forms and associated paperwork have been submitted as per the checklist	2	5
	PC5. check the completeness of all necessary fields in the form or application as per the checklist	2	5
	PC6. take agreed procedural action when applications are unacceptable	2	3
	PC7. collate and mark applications and documentation ready for further processing	2	3
	PC8. handover the documents after checking and marking for further processing to the authorised personnel as per instructions	2	3
	PC9. ensure that there is no damage to the documents during receipt, checking and handover process	2	4
	PC10. maintain workplace confidentiality standards	2	3
	PC11. follow necessary health, safety and security measures for the work	2	3
	PC12. obtain pre-set form or template in which data has to be entered manually or using a computer application	2	4
	PC13. obtain clarification with respect to instructions for source of data, type of data required in each section, sequence of entering data, priorities, codes, dos and donts	3	3
	PC14. gather data from the authorised source and through approved methods and record the data in the form and template provided as per instructions received Methods: phone calls, reading physical documents, reading online documents, interviewing people, etc.	3	5

Note: The value **100** appears in the spanning middle column alongside the MEP/N0224 section rows.

	PC15. verify correctness of all the data entered and adherence to instructions		2	4
	PC16. rectify errors in data using approved procedures		2	4
	PC17. ensure entries are made in a legible and presentable format and measures are taken to avoid any loss of data.		2	4
			36	**64**
MEP/N0225: Co-ordinate with internal and external agencies to complete operational requirements	PC1. identify details of operational requirement to be completed		1	1
	PC2. identify relevant personnel and agencies involved and obtain their contact details		1	1
	PC3. obtain clarification on the role and responsibilities of the various people and agencies involved		1	1
	PC4. obtain workplan and schedule for completion of work		1	2
	PC5. prepare efficient to-do lists and work plans and share them with relevant people		2	2
	PC6. prepare week-wise and day-wise plans for completion of tasks and sub-tasks, taking account of lag times, dependencies and slack		2	2
	PC7. identify and assign priorities, responsibilities, dependencies and timelines for work task completion		2	2
	PC8. prepare schedules, set-reminders and flag task items according to sequence and importance using calendars and planners		2	2
	PC9. book appointments and schedule web and phone calls, sending e-invites and relevant instructions, accurately		2	2
	PC10. set-up and check voice and video communication tools and applications effectively, prior to making calls		2	2
	PC11. follow-up on task requirements with other relevant personnel by connecting with the point of contact as per identified communication preference and professional protocol Communication preferences: preferred mode of communication(Phone call, email, chat, letters, face to face interview, web conferences), time of communication, address of communication, etc.	100	2	2
	PC12. request for completion of work or information required following communication etiquettes as per mode of communication used and professional protocol mode of communication: Phone call, email, chat, letters, face to faceinterview, web conferences		1	1
	PC13. resolve queries and doubts by obtaining and providing appropriate information and support from authorised sources		1	2
	PC14. record response obtained as per standard operating procedure		1	1
	PC15. update trackers, GANTT charts, calendars and planning documents to indicate progress and current status		2	2
	PC16. send updated status and progress in agreed formats to relevant personnel in a timely manner		1	2
	PC17. prepare minutes of meetings accurately using agreed formats and share with relevant personnel in a timely manner		1	2
	PC18. share documentation for orders, approvals, request for information or quotations, expense vouchers, etc. with relevant personnel		1	2
	PC19. resolve technical difficulties in set-up and use of voice or video communication devices or applications and report unresolved technical difficulties and issues, to authorised personnel in a timely manner		1	2

	PC20. follow organisational process for official purchases and expenses		1	1
	PC21. negotiate with vendors to get optimum value for money as possible		1	1
	PC22. register the vendor in co-ordination with finance team as per organisational norms		1	1
	PC23. check bills and invoices to ensure that they are correct as per the products/services purchased or sold respectively		1	1
	PC24. co-ordinate between vendor and finance department for timely release of payment to the vendor		1	1
	PC25. follow organisation process for claiming allowed re-imbursements		1	1
	PC26. perform common banking transactions like depositing cheque or cash; getting the passbook updated; getting a demand draft made; etc.		1	1
	PC27. receive, acknowledge and record incoming documentation (in physical and electronic forms) related to projects and tasks and file them in an organised and safe manner		1	1
	PC28. record outgoing documentation accurately, save and file copies of outgoing documentation in physical and electronic forms as per organisational standards		1	1
	PC29. check documentation effectively for compliance to stated requirements and necessary authorisations, to identify gaps in information or approvals for further processing		1	1
	PC30. identify actions that need to be undertaken and related parameters, by interpreting information on documentation received, accurately		1	2
	PC31. check for authorisation effectively, before sending or sharing any documentation to any person or firm agency requesting for information		1	1
	PC32. take necessary and timely back-ups for essential documentation or messages, using authorised actions and tools, to avoid loss due to exigencies		1	2
	PC33. exchange relevant pleasantries with colleagues and work contacts at various levels, for routine and special occasions		1	1
	PC34. express gratitude to personnel for their contributions towards work tasks, by sending them an appropriate thank you messages, within limits of authority		1	1
	PC35. draft and send apology messages for delays or errors, within limits of authority		1	1
	PC36. seek information on challenges faced by colleagues and work contacts, and offer timely support		1	2
	PC37. share and clarify information in a timely and accurate manner, to colleagues and work contacts to clear misunderstandings due to incorrect or lack of information, as per authorisation		1	2
			45	**55**
MEP/N9903: Apply health and safety practices at the workplace	PC1. identify, control and report health and safety issues relating to immediate work environment according to procedures	**100**	2	2
	PC2. work safely and apply health and safety practices in the training and assessment environment including using appropriate personal protective equipment (PPE) where required		2	2

PC3. follow procedures and instructions for dealing with hazards, within the scope of responsibilities and competencies		2	2
PC4. document and report all hazards, accidents and near-miss incidents as per set process		2	2
PC5. document safety records according to organisational policies		1	3
PC6. maintain the work area in a clean and tidy condition		1	3
PC7. maintain personal hygiene		1	3
PC8. report hygiene related concerns promptly to the relevant authority		2	2
PC9. demonstrate how to free a person from electrocution		2	2
PC10. administer appropriate first aid to victims wherever required e.g. in case of bleeding, burns, choking, electric shock, poisoning etc.		2	3
PC11. demonstrate basic techniques of bandaging		1	3
PC12. respond promptly and appropriately to an accident situation or medical emergency in real or simulated environments		2	3
PC13. perform and organize loss minimization or rescue activity during an accident in real or simulated environments		2	3
PC14. administer first aid to victims in case of a heart attack or cardiac arrest due to electric shock, before the arrival of emergency services in real or simulated cases		2	3
PC15. demonstrate the artificial respiration and the CPR Process		2	3
PC16. participate in emergency proceduresEmergency procedures: raising alarm, safe/efficient, evacuation, correct means of escape, correct assembly point, roll call, correct return to work		2	3
PC17. complete a written accident/incident report or dictate a report to another person, and send report to person responsibleIncident Report includes details of: name, date/time of incident, date/time of report, location, environment conditions, persons involved, sequence of events, injuries sustained, damage sustained, actions taken, witnesses, supervisor/manager notified		2	3
PC18. demonstrate correct method to move injured people and others during an emergency		2	3
PC19. use the various appropriate fire extinguishers on different types of fires correctlyTypes of fires: Class A: e.g. ordinary solid combustibles, such as wood, paper, cloth, plastic, charcoal, etc.; Class B: flammable liquids and gases, such as gasoline, propane, diesel fuel, tar, cooking oil, and similar substances; Class C: e.g. electrical equipment such as appliances, wiring, breaker panels, etc. (These categories of fires become Class A, B, and D fires when the electrical equipment that initiated the fire is no longer receiving electricity); Class D: combustible metals such as magnesium, titanium, and sodium (These fires burn at extremely high temperatures and require special suppression agents)		2	3
PC20. demonstrate rescue techniques applied during fire hazard		2	3
PC21. demonstrate good housekeeping in order to prevent fire hazards		2	3
PC22. demonstrate the correct use of a fire extinguisher		2	3
		40	**60**

MEP/N9912: Apply principles of professional practice at the workplace	PC1. display appropriate professional appearance for the workplace		1	2
	PC2. interact with team members, clients, vendors, visitors and other stakeholders in a Professional manner		1	2
	PC3. develop personal and professional goals and objectives		1	2
	PC4. identify strengths and weaknesses in relation to goals and objectives		1	2
	PC5. evaluate own capacity to meet goals and objectives		1	2
	PC6. determine personal development needs to perform role as per desired standards		1	2
	PC7. develop a professional development plan to enhance professional capabilities		1	3
	PC8. document a professional practice plan designed to support the achievement of goals		1	2
	PC9. select and implement development opportunities to support continuous learning and maintain currency of professional practice		1	2
	PC10. research developments and trends impacting on professional practice and integrate information into work performance		1	2
	PC11. invite peers and others to observe, and provide feedback, on own performance and practices		1	2
	PC12. use feedback from colleagues and clients to identify and introduce, improvements in work performance		1	2
	PC13. perform tasks to the required workplace standard		2	3
	PC14. complete duties accurately, systematically and within required timeframes	100	1	2
	PC15. follow organisational policies		1	2
	PC16. protect the rights of the client and organisation when delivering services		1	3
	PC17. ensure services are delivered equally to all clients regardless of personal and cultural beliefs		1	2
	PC18. recognise potential ethical issues in the workplace and discuss with an appropriate person		2	2
	PC19. recognise unethical conduct and report to an appropriate person		1	2
	PC20. operate within an agreed ethical code of practice		2	2
	PC21. apply organisational guidelines and legal requirements on disclosure and confidentiality		1	2
	PC22. identify and obtain clarity regarding organisational, team and own goals		1	2
	PC23. prioritise tasks at work as per organisational, team and own goals		2	3
	PC24. plan to meet team performance targets and standards		2	2
	PC25. monitor own and team performance as per agreed plan		1	2
	PC26. share all relevant information with stakeholders in agreed formats and as per agreed timelines		1	2
	PC27. work collaboratively with colleagues through sharing information and ideas and working together on agreed outcomes		2	2
	PC28. recognise, avoid and/or address any conflict of interest		1	2

	PC29. use of conflict resolution and negotiation skills to identify critical points, issues, concerns and problems, identify options for changing behaviours		1	2
	PC30. recognize and respond to inappropriate behaviour towards self or others in a professional manner and as per organisational policyInappropriate behaviour: violence, inappropriate language, verbal or physical abuse or bullying, insensitive verbal or physical behaviour in terms of cultural, racial, disability and gender-based insensitivities, dominant or overbearing behaviour, disruptive behaviour, non- compliance with safety instructions, unethical behaviour		1	2
			36	**64**
MEP/N9914: Communicate with clients, visitors and colleagues effectively	PC1. seek and obtain clarification about job related requirements, performance indicators and incentives from reporting superior		2	2
	PC2. record and report work output, exceptions and any anticipated reasons for delays to supervisor as per organisational requirements		2	2
	PC3. escalate grievances and problems to appropriate authority as per procedure to resolve them and avoid conflict		2	2
	PC4. seek and receive feedback on performance output and quality		2	2
	PC5. accurately receive information and instructions from colleagues getting clarification where required		2	2
	PC6. accurately pass on information to authorized persons who require it and within agreed timescale and confirm its receipt		2	2
	PC7. give information to others clearly, at a pace and in a manner that helps them to understand		2	2
	PC8. display helpful behaviour by assisting others in performing tasks in a positive manner, where required and possible		2	2
	PC9. consult with and assist others to maximize effectiveness and efficiency in carrying out tasks		2	2
	PC10. display appropriate communication etiquette while workingCommunication etiquette: do not use abusive language; use appropriate titles and terms of respect; do not eat or chew while talking (vice versa) etc	**100**	2	2
	PC11. display active listening skills while interacting with others at work		2	2
	PC12. use appropriate tone, pitch and language to convey politeness, assertiveness, care and professionalism		2	2
	PC13. demonstrate responsible and disciplined behaviours at the workplaceDisciplined behaviours: e.g. punctuality; completing tasks as per given time and standards; not gossiping and idling time; eliminating waste, honesty, etc.		2	2
	PC14. interact with colleagues from different functions clearly and effectively on all aspects to carry out the work among the team and understand the nature of their work		1	2
	PC15. meet and greet visitors promptly, treating them politely and making them feel welcome		1	3
	PC16. ask questions politely to the visitors in order to identify them and their needs		1	3
	PC17. provide clear and accurate information visitors as per their requirement, while following organisation policies for information access and confidentiality		1	3

|				
	PC18. communicate with the visitors in a polite, professional and friendly manner		1	2
	PC19. listen actively in a two way communication		1	3
	PC20. be sensitive to the gender, cultural and social differences such as modes of greeting, formality, etc		1	2
	PC21. identify customer dissatisfaction, reason for dissatisfaction and address to their complaints effectively		1	2
	PC22. ensure to maintain a proper body language, dress code, gestures and etiquettes towards the customers		1	2
	PC23. allow the visitors to complete what they have to say without interrupting them while they talk		1	3
	PC24. ensure to avoid negative questions and statements to the customers		1	2
	PC25. inform the customers on any issues or problems before hand and also on the developments involving them		1	3
	PC26. ensure to respond back to the customer immediately for their voice messages, e-mails, etc		1	2
	PC27. seek feedback from the visitors on their experience		1	2
			40	60

Annexure III

List of QR Codes Used in PHB

Module No.	Unit No.	Topic Name	Page No. in PHB	URL	QR Code (s)
1. Introduction to the Training Program	UNIT 1.3: Office Management	1.3.1 Office Management	19	https://youtu.be/8i-wOCXkImmI	What is Office Management?
	UNIT 1.4: Job Responsibilities of an Office Operations Executive	1.4.2 The Importance of the Office Operations Executive's Role in an Organization	19	https://youtu.be/vy_jH-dUoGUs	Operation Executive
2. Check Forms and Applications for Completeness as per Norms	UNIT 2.3: Data Entry Errors	2.3.1 Types of Data Entry Errors	38	https://youtu.be/K5cvfvUWx-Q	Check and Fix Data Entry Errors
3. Workplace Related Routine Texts and Correspondence	UNIT 3.2: Business Communication and Basic Numeracy	3.2.1 What is Business Communication?	63	https://youtu.be/fyzmCU931QE	What Is Business Communication?
	UNIT 3.2: Business Communication and Basic Numeracy	3.2.3 Basic Numeracy	63	https://youtu.be/iowS-9rDrsks	Basic Numeracy

Module No.	Unit No.	Topic Name	Page No. in PHB	URL	QR Code (s)
4. Receive and Make Phone Calls	UNIT 4.1: Listening Skills	4.1.1 Importance of Active Listening Skills	76	https://youtu.be/EyPwK-wVhyw4	Active Listening Skills
5. Prepare to Coordinate Work Tasks	UNIT 5.2: Planning and Organizing	5.2.2 Planning Tools	89	https://youtu.be/31m-2WePfqIc	Management and Planning Tools
	UNIT 5.2: Planning and Organizing	5.2.3 Eisenhower's Principle	89	https://youtu.be/tT89OZ-7TNwc	How to Manage Your Tasks?
6. Execute Follow-Up Activities and Build Good Relations	UNIT 6.1: Communication Etiquette and Netiquette with Internal and External Customers	6.1.1 Understanding Communication Etiquette and Netiquette	102	https://youtu.be/fvBxpx-fzXEI	What is Netiquette?
	UNIT 6.2: Modes of Communication for Workplace Collaboration	6.2.1 Communication Tools	102	https://youtu.be/TcZc-6M1zNeg	Modern Forms of Tools of Communication

Module No.	Unit No.	Topic Name	Page No. in PHB	URL	QR Code (s)
7. Process Documents	UNIT 7.2: Record Keeping	7.2.1 Analyse Record Keeping	111	https://youtu.be/Hyfx-VZ4OcfM	How to Check Documents if they are Fake or Real?
8. Maintain Office Related Records and Documentation	UNIT 8.1: Office Records	8.1.2 Record Management	124	https://youtu.be/_U9z-SiOJwzE	Records Management
	UNIT 8.2: The 5 S System	8.2.1 Understanding the 5 S System	124	https://youtu.be/dW-8faNOX91M	What is '5S' Methodology?
11. Communicating with Clients and Visitors	UNIT 11.1: Meeting and Greeting Visitors	11.1.2 Business Etiquette	212	https://youtu.be/I4uL-5mkcAJc	Business Etiquette
13. Fire Safety	UNIT 13.1: Fire Hazards and Safety	13.1.1 Fire Accidents at Workplace	234	https://youtu.be/ReL-DM9xhpI	Fire Emergency and Fire Prevention at Your Workplace
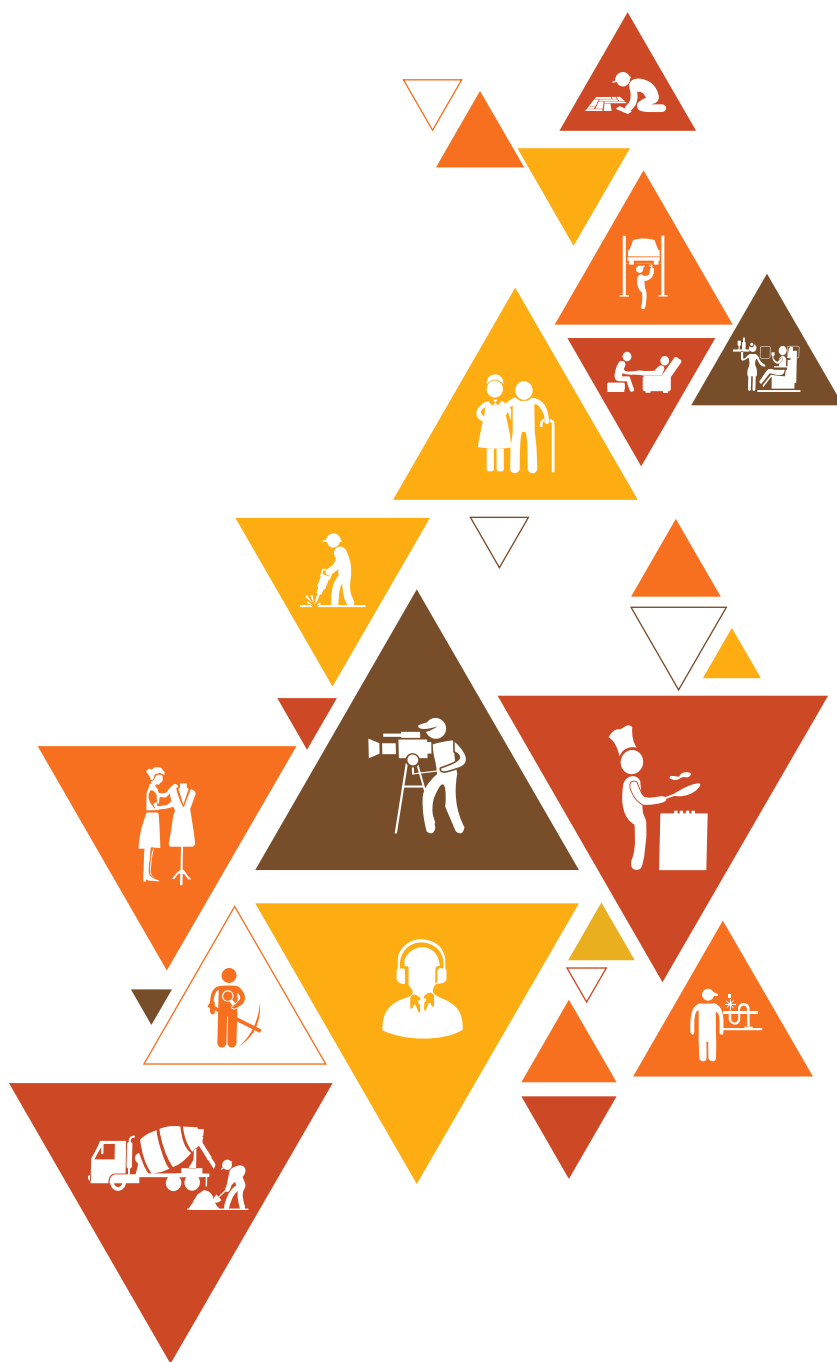
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