

SAMPLE

# Longman Office Administration

for CSEC®

Third Edition

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LEARNING

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# 1

## Office orientation (A)

*In this section, you will understand the basics of how businesses and organisations operate, why they need many different types of offices and office workers, and the type of work that goes on in those offices.*

### Key terms

**orientation** The process of introducing a new employee to the workplace, people, policies and procedures

**resources** The materials, money and people required for an organisation to operate

**consumers** Individuals or households that use goods and services

**mission statement** A statement defining an organisation's purpose, values and overall direction



Figure 1.1 SMART goal setting



### Objectives

After completing this chapter, you will be able to:

- describe the role and functions of the office in supporting business activities, including production, distribution, data management, information sharing and organisational control
- explain how the size and nature of a business affects the structure of its office
- identify different office roles, duties and responsibilities in small, medium and large organisations
- discuss how employees are deployed within a business to meet changing needs
- compare the advantages and disadvantages of centralised and decentralised office functions
- recognise how computer hardware, software and digital tools are used to improve office efficiency.

## Introduction

### Welcome to the world of Office Administration!

This chapter is intended to introduce you to the world of the office worker. It will orientate you towards the types of jobs you may do after finishing school and passing your exams. **Orientation** for new employees means 'finding your bearings' in the workplace. It is the process of introducing you to your new co-workers, your job responsibilities and your workplace. It also means integrating employees into the organisation in a manner that motivates them to stay in the employment and quickly contribute to the goals of the team. The orientation process will help you understand how your role contributes to the vision and mission.

## The role and functions of the office

### Productivity

The objective of any business is to combine **resources** to make a profit. The business does this by creating goods and services that will satisfy the desires of **consumers**. The goods and services produced must be of a standard acceptable to the market. The objectives must be **SMART**: Specific, Measurable, Achievable, Realistic and Time-bound for any given period (Figure 1.1). They are the core ideals that shape the vision and **mission statement** of the business, and remain fairly stable, even as the business adapts to competition and changes in the marketplace.

The office plays an important role by managing administrative and logistical operations, helping to decide what is produced and ensuring high quality standards.

The owners of businesses invest in materials and acquire resources (including capital and people) to make goods or produce a service which will satisfy the demands of consumers and industrial markets. Investment is the process of using capital (wealth) to enable increased production of goods and services. The process of production is taking inputs in the form of raw materials and converting them into outputs or products.

## Key terms

**business objectives** The results a business aims to achieve within a set timeframe

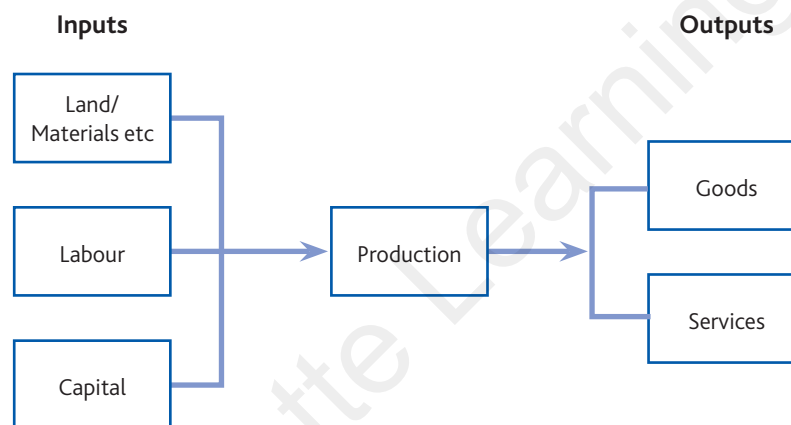
**target customer** The type of customer an organisation aims to attract and retain

Goods are physical items that can be seen, touched and owned, such as televisions, laptops, mobile phones and cars. Services, on the other hand, are not physical. They include things like insurance, hairdressing, car repairs and transport. Services can be paid for and are useful to the customer, but they cannot be touched or taken home.

Business owners invest their capital to acquire land, buildings, raw materials and equipment, to execute their **business objectives**. They employ people (labour – the investment in employee time, skill and creative energy) to manage and use the equipment to produce the good or service. Governments invest in the same way by providing services, such as hospitals, education, police and defence services.

Therefore, in this chapter, when we talk about ‘businesses’, we could also be talking about governmental agencies.

Figure 1.2 depicts what inputs are required for production to take place, and the outputs that result from those inputs. Together, these make up the production process.



**Figure 1.2** The production process

The output from the production process – the finished goods or services – must be distributed to the **target customer**. That is, output must be delivered to the persons who want to buy the product. Goods or services are exchanged when the buyer agrees to pay a set amount and the seller agrees to sell at that price. Most prices are fixed, but some can be negotiated.

## Distribution and exchange of goods and services

Once the goods and services have been produced, it is the function of the office to ensure their distribution. The traditional office is a physical space within a business. With the growth of telecommuting, virtual offices have developed. These offices may be spread across countries and continents, with employees working from home or hotels using desktops, laptops, smart TVs or mobile phones. This way of working became much more common during the COVID-19 pandemic in 2020.

Each office employs people to perform certain tasks. These tasks, once performed, will help that business deliver its goods or services to the market. The office is, therefore, at the centre of how a business functions. Depending on the size of the business, there may be several offices that specialise in specific tasks. We will see later that in small businesses, this is not necessarily the case.

## Key terms

**company** A legal business entity formed under a country's company law

**advertising** The promotion of products or services through media such as television, radio, print, or the internet

**greenhouse gas** A gas that contributes to warming by trapping heat in the atmosphere (e.g. carbon dioxide, methane)

Some offices in large businesses include the following:

- **The records management office** may look after all the documents and records – electronic or physical – that are generated by all offices in the **company**. These records ensure that information related to the functioning of the company is preserved for future reference. Records are the corporate memory of the organisation and are retained to meet the legal and financial obligations of the organisation. The records management office makes sure documents are stored safely, organised logically, and easy to access when needed, while also meeting legal requirements for how long they must be kept.
- **The human resources management (HR) office** is responsible for ensuring that the business is – at all times – correctly staffed by the right number of people with the skills relevant to the needs of the business. The HR department is responsible for **advertising** jobs, testing and interviewing candidates, carrying out background checks, making decisions and offers, and training and hiring office staff. The HR department is also responsible for those who work in the manufacturing plant, the transport section and all other departments that are part of this particular business. This office also looks after employees' interests, such as retirement plans, pensions and health insurance, if these are offered by the business.
- **The accounts office** is responsible for all the money coming into and going out of the business. It keeps records of money owed to the business (debtors) and money the business owes (creditors). This helps the owners see the business's income and spending at any time and decide whether it is making a profit.
- **The procurement and stock control office** is responsible for buying the raw materials needed for production, such as glass for bottle making or granite for worktops. It monitors stock levels to ensure the right materials are available in the right place at the right time. The office also keeps a detailed list of suppliers, showing what they provide and how much it costs.
- **The sales and marketing office** is the most customer-focused part of the business. It communicates directly with customers in order to promote and sell the goods or services produced by the business. Its main function is to attract and retain customers and increase sales volume by meeting customer demands with appropriate and timely supply.
- **The operations, dispatch and transport offices** also have vital roles. A key role of this department is to make sure the factory runs efficiently. This includes maintaining equipment and tools and moving them when needed to ensure a smooth flow of goods and services. It also encourages employees to reduce **greenhouse gas** emissions and their carbon footprint. The dispatch and transport office organises deliveries to customers, ensuring the correct quantity of goods or services is delivered on time. The department also plans staff assignments and transport routes based on the size and type of loads being delivered.



## Activity 1.1

- 1 Identify a good, that is, something that you would normally buy for yourself when you go shopping in a store or online.
- 2 List the 'inputs' that you think went into making the good you identified.
- 3 List the other processes that you think supported its production.
- 4 How do you think the office contributed to this process?

**Key term**

**data** Information collected for a specific purpose

## Collection, processing and preservation of data and information

In this section, you will see that **data** and information are crucial to the successful running of any business or organisation.

Data and information are similar, but they are not the same. Data refers to unprocessed facts, such as figures, events or transactions. On their own, these facts may have little meaning until they are placed in context. For example, the number of units sold by the company Platinum Inc. in one year is raw data. This might be shown as a single figure, such as '685 units'.

This becomes information (that is, it informs us of something) when we additionally know such things as:

- In which regions of the country each unit was sold.
- For what price each unit was sold.
- Who bought each unit.
- Through which sales channels the unit was sold, for example in stores, via online platforms, mail order or door-to-door sales.

When we put all the data together, possibly combined with other data, we can analyse it to derive knowledge or display further information. In brief, we can say information is the result of data that has been processed and analysed to the extent that it is meaningful to the person who receives it through some channel of communication.

Data can be processed either manually or electronically. Electronic data processing (EDP) means using computers and software to collect, process and store data. In this section, the term 'information' is used more often than 'data' because information is more valuable to a business.

Information gathered by a business can be disseminated in a variety of ways using both modern and traditional communication methods, such as email, meetings, internet platforms, telephones, video calls, shared databases and collaboration tools like Microsoft Teams or Slack. You will learn more about different methods of communicating information in other chapters.

There are two main reasons why businesses collect, process and disseminate information.

### Customer satisfaction

Customer satisfaction means making sure customers get what they want so they return for more goods and services. It is key to a successful business, as satisfied customers often recommend the business through word of mouth or online reviews, bringing in new customers. Businesses therefore make great efforts to gather information about what current and potential customers may want. This may be by means of customer surveys, analysing buying patterns of existing customers, feedback in person, on the phone, through apps or online.

### Order processing

This involves maintaining processes that enable all parts of the company to work together in delivering goods or services to the customer.

*More content on customer service and satisfaction is found in Chapter 18.*



## Case study: Digital sales and logistics at Platinum Group Co. Ltd

Platinum Group Co. Ltd is a leading distribution company based in the Caribbean that specialises in high-demand consumer electronics. To maintain its competitive edge, the company has fully integrated digital systems to manage its sales and supply chain operations.

The process begins when a potential buyer, Ms. Doe, contacts Platinum Group Co. Ltd via email or through the company's official website. She submits an enquiry regarding specific product pricing, credit terms, and delivery options. The sales office receives this digital enquiry, processes the request, and replies promptly with a detailed quotation and terms of service.

Satisfied with the information provided, Ms. Doe follows up by placing a formal order through the company's online ordering platform. The system securely collects her personal details, delivery address, and payment information using various methods, including credit cards and digital wallets like PayPal and Apple Pay®.

Once the order is confirmed, the sales office electronically transmits the data to the relevant departments. A sales clerk uses the company's Enterprise Resource Planning (ERP) system to check stock levels, update company records, and notify the warehouse. Simultaneously, the accounts department is alerted to generate and email an electronic invoice to Ms. Doe.

Finally, the logistics department uses a digital dispatch system to select the most efficient transportation route. The system automatically generates a dispatch schedule and sends Ms. Doe an SMS and email with tracking details and an estimated delivery date.

### Questions

- 1 Identify three digital communication tools mentioned in the case study that Platinum Group Co. Ltd uses to interact with customers.
- 2 Explain the role of the sales **clerk** in the order fulfillment process and identify the specific system they use to manage company records.
- 3 Why is it important for the accounts department to be notified electronically at the same time the warehouse is informed?
- 4 Discuss two benefits of using an automated dispatch schedule for a Caribbean company that may have to deliver goods across different islands or rural territories.
- 5 Based on the case study, list the types of sensitive customer data the company must protect under data privacy **regulations**.

### Key terms

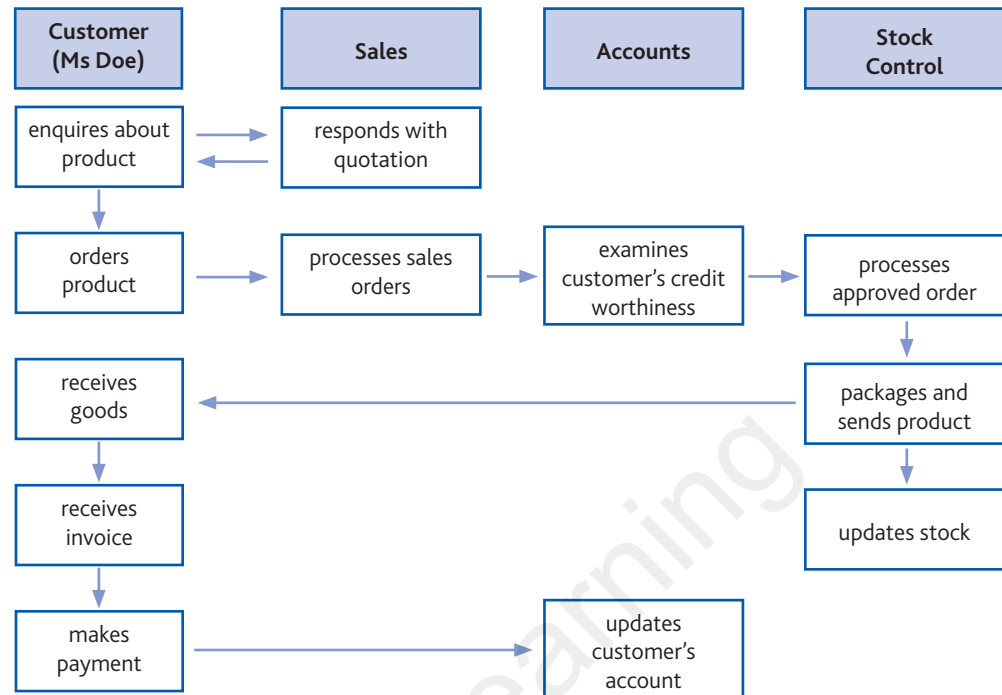
**clerk** An administrative employee responsible for handling documents and information

**regulations** Rules specifying procedures and conduct to be followed

The Case study and Figure 1.3 show that information must flow between different parts of a business to meet customer needs. For a business to be successful, data must move efficiently using established procedures (such as digital forms and records) to ensure orders are delivered correctly.

In modern businesses, the commencement of a sales process typically takes two forms:

- Telephone enquiries: A customer may call the office. This might be answered by an Automated-Attendant or an Interactive Voice Response (IVR) system. If the system cannot satisfy the customer, the call is transferred to a live agent for personal assistance.
- Digital touchpoints: A customer may visit the company's website or mobile app. These platforms are designed to guide the customer from the initial enquiry to placing the order and making secure payments online using digital wallets like Apple Pay®, Google Pay™ payment service or PayPal.



**Figure 1.3** Process of enquiry, order and dispatch

## Preservation of information

Information is stored by businesses and organisations for several reasons. The main ones are:

- To keep a record of the day-to-day goings on in the business. Consider the example given of Platinum Group Co. Ltd, regarding how the company sells its product. At each stage of the process, documents had to be generated. It is vital that copies of these documents be kept safe, so that there is always a record of every business transaction. Some reasons for this are:
  - To plan and monitor the company's resources (including personnel) for decision-making.
  - To analyse the market in which it operates.
  - To answer a customer query about an order.
  - To measure its performance in any financial period.
  - For compliance with the law.
  - To have evidence in case of disputes with customers or potential legal action.
- Many laws and regulations state which business records must be kept and how long they must be retained. For example, when a business declares its income for tax purposes, the Board of Inland Revenue (BIR) may check that the reported profits and expenses are accurate. To do this, it may examine records, accounts and documents relating to the business's income for that year. These laws apply to all records, whether they are stored electronically or on paper.

Businesses must therefore have a document retention policy to ensure the correct documents are kept to meet legal requirements. These documents must be stored for the right length of time and should be protected from unnecessary disclosure. This policy should cover both paper and electronic documents.

*You will learn more about electronic storage in Chapter 10.*

### Data collection

Information within an organisation can be stored in paper files, on computer servers, or in the cloud, where it can be accessed by authorised staff at different levels. Electronic storage makes it easier to enter, organise and retrieve information because computers allow files to be archived in a structured way. You will learn more about this in Chapter 10.

**Electronic data processing (EDP)** can be fully automated, allowing information to be recorded, stored, accessed, analysed, sorted, calculated and shared in a chosen format across the business or organisation.

In some businesses, such as banks and retail stores, customers enter data using touch-sensitive screens. For example, banks use automated teller machines (ATMs) that allow customers to make enquiries, withdrawals and deposits through touchscreens or keypads (Figure 1.4). Online banking allows customers to carry out the same and other transactions by using a computer, touchscreen mobile phone or tablet.



**Figure 1.4** Customer using ATM

A document management system equipped with artificial intelligence (AI) can automatically categorise documents, extract relevant data using optical character recognition (OCR) and route files to intended departments. This reduces errors that might occur in manual data entry.

Some retail stores enable patrons to check out their purchases using self-service electronic points of sale. Customers scan the universal product code (UPC) or barcode on each item. Barcodes are made up of bars and spaces of different widths that store information, which is sent to a computer when scanned. The system calculates the total cost of the purchase. Customers can then pay by inserting cash, and the machine calculates and gives the correct change if needed. If paying by debit or credit card, the card is inserted or tapped, and the correct amount is deducted from the customer's bank account.

### Data storage

Once data is collected, it must be protected from loss, alteration or unauthorised access. Businesses use set procedures to control how documents are handled, stored and reviewed to ensure accuracy and security.

*You will learn more about this in later chapters.*

You will learn more about the role of the records management clerk in Chapter 10.

### Key terms

#### dissemination

Distributing information internally or externally

**efficiency** Achieving maximum productivity with minimal waste

### AI assist

Picture yourself in a small office or running a small business. You could use AI to help. For instance, you could ask AI to filter through customer emails and identify the most important ones or help you write a response to a customer enquiry.

Remember: AI offers suggestions, but you are responsible for verifying the information before you use it. Always check with your teacher before you use AI for schoolwork.

While manual records were traditionally stored in filing cabinets or on microfiche or microfilm, these methods take up space, deteriorate over time and offer limited backup. As a result, most businesses now store information electronically on secure servers, cloud systems or external drives. Electronic and cloud storage allows authorised staff to access information easily while also providing backup and recovery in case of data loss.

A document retention policy determines which documents are kept, how long they are stored, who is allowed to access them and how sensitive or outdated records are safely disposed of. This policy ensures legal compliance, protects confidential information and supports efficient document management.

### The role of the records management clerk (or filing clerk)

Record management clerks are responsible for maintaining the storage and retrieval of information.

### Activity 1.2

Some online companies offer free data storage. Others offer storage for a one-time or periodic fee.

Find out how a business can use the internet to store data and write a short summary of what you find.

## Dissemination of information

The aim of information **dissemination** is to make information available to the right audience. Information can be shared verbally, in writing, or digitally through email, social media, websites, blogs, mobile apps, webinars, and traditional media such as newspapers and radio, depending on whether the audience is internal or external. Businesses must have clear rules and procedures to ensure that information shared about employees, customers, suppliers and other business relationships is accurate, appropriate and timely, in keeping with company policies and legal requirements.

Requests about current or former employees are handled by the Human Resource (HR) department. Information on products and services are dealt with by the advertising, marketing or sales departments.

### Self-check questions

- 1 Name two possible outputs from the production process in a business. What is the difference between these two outputs?
- 2 What is another word with a similar meaning to
  - a labour
  - b capital?
- 3 What is the difference between information and data?
- 4 Give one example of why information would be disseminated in a business.
- 5 Identify two different ways in which information can be stored in a business.

## Organisational management and legal control

The role of the office is to maintain **efficiency** while complying with relevant laws. It does this by coordinating business activities so that each department can perform its functions effectively within the law.

The office handles incoming calls, emails and online enquiries and directs them to the correct departments. It also acts as a link between visitors and executives,

answering routine questions in person, by phone or through digital customer service platforms. Other responsibilities include managing mail and deliveries, handling digital communications, maintaining a professional reception area and ensuring that both physical and digital supplies are available for efficient operations.

In small businesses, the office management role may include buying office equipment such as laptops, printers, software subscriptions and furniture, as well as keeping asset registers to record this equipment. The office also organises secure digital and paper filing systems for invoices, receipts, client details and other important documents. It may manage client billing, record employee hours, handle HR records, process payroll and issue electronic payslips. In larger organisations, these tasks are handled by specialised departments. However, in all businesses, the office plays a central role in coordinating these activities. Other functions of the office include:

- Assisting the business in becoming and remaining a good corporate citizen through compliance with laws and regulations.
- Implementing an effective complaint handling system.
- Providing employees with the requisite training in the use of machines and equipment.

### Key term

**legislation** Laws made by a government

Another major function of the office is to assist and advise employees on their rights and responsibilities in the workplace under **legislation** such as the Occupational Health & Safety Act, Holiday with Pay Act, Labour Act, or Labour Code and Employment Act. The office helps ensure the business is aware of legal and regulatory requirements relating to employees, company records, financial statements and taxation, although these are usually handled by specialist departments. It is useful for office clerks to read these laws in outline so they understand how they affect the business and employees.

## How the size of the business affects the structure of the office

The organisational structure of a business and the responsibilities of its employees depend, to a large extent, on the size and nature of the business.

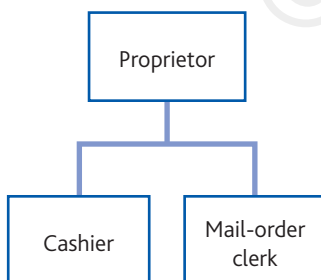
This defines the roles and positions of the staff employed by it. The following sections focus on business size and how staff are assigned their roles within the company.

### The small business

A small business in your neighbourhood will most likely be run by a sole trader or proprietor who also owns the business.

A typical example could be a specialist shop, with a shop front managed by a cashier, and a small online sales operation handled by an office clerk (Figure 1.5). In such a shop, all key business decisions are made by the owner, also called the proprietor. The proprietor is the entrepreneur who decided to start the business, and therefore takes full responsibility for both profits and debts. In many Caribbean countries, neighbourhood supermarkets, auto repair shops, salons, restaurants and car rental services are often operated as sole proprietorships.

If the sole proprietor employs other people, they are usually not specialists in one particular area. Instead, they support the general running of the business. Workers in these shops typically have little input in decision-making, since the proprietor is closely involved, has invested their own money, and therefore exercises strong control over operations.



**Figure 1.5** Organisation chart for a sole trader/proprietor

In small businesses, the office worker is usually someone who can handle a wide range of clerical and administrative tasks, using relevant systems and procedures. These tasks may include:

- Sorting and filing documents either manually or digitally (e.g. customer orders).
- Scheduling appointments with customers, suppliers or service providers.
- Receiving and assisting visitors.
- Answering phone calls, emails and messages.
- Maintaining inventories and office supplies.
- Managing incoming and outgoing correspondence (both physical and electronic).
- Basic bookkeeping and invoicing.
- Operating office machines and digital tools.
- Processing deliveries and packages.

### Key terms

**proprietor** The legal owner of a business

**partnership** An arrangement where two or more people own a business together under agreed terms

**investment** The use of money to buy assets with the aim of generating income or profit

Most of these tasks are carried out with minimal supervision from the **proprietor**. While the proprietor makes all strategic and financial decisions, they usually trust the office worker to manage day-to-day administrative tasks independently.

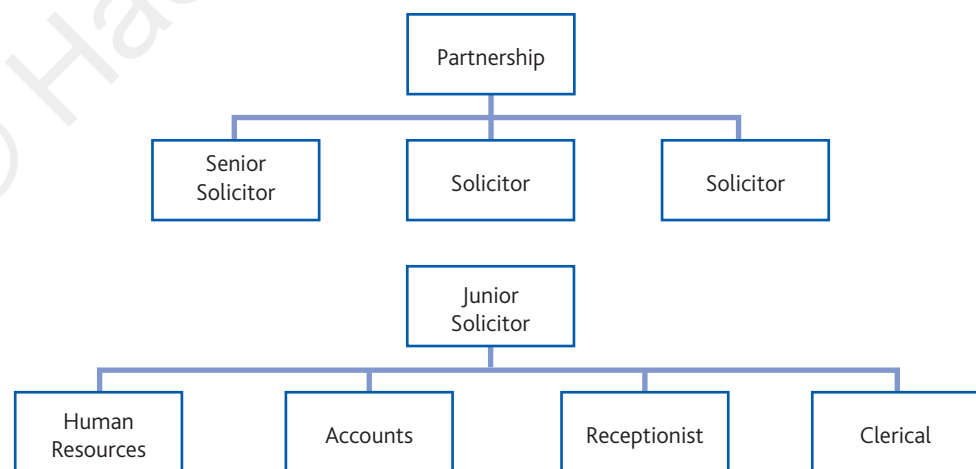
Small businesses often operate with limited technology, perhaps just one or two computers. These are used extensively to manage accounts, send emails, design invoices, update websites and market the business through social media. Many sole traders rely on cloud-based tools and a variety of software applications to manage accounting, scheduling, marketing and customer service efficiently.

### Did you know?

Even very small businesses often use cloud-based software for payroll, marketing and customer records. This means a sole trader with just one laptop can access tools that once required whole departments in large companies.

## The medium-sized business

Medium-sized businesses are generally thought of as having approximately 50 employees or more. A typical medium-sized business (or organisation) could be a firm of lawyers. Such a business may be a **partnership**, where there are two or more lawyers who are the owners of the business (Figure 1.6). They share overall responsibility, management duties and profits, in proportion to their individual share or **investment** in the business when it was established. Like proprietorships, the law does not distinguish between the business and its owners.



**Figure 1.6** Organisation chart for a partnership

Study the organisation chart in Figure 1.6. It shows the structure of the partnership, including the relationships and levels of authority. Imagine that, in addition to the partners, there are other lawyers and legal executives working under them. This type of business will certainly employ more than one office worker, perhaps with specialised

skills. Specialisation allows the office to function more efficiently; rather than one person learning several different types of tasks, individual office workers become experts in a particular field. They then communicate with each other as a team, when necessary, to ensure that the overall needs of the business are met.

Generally, each person will be left to get on with their job – in modern management, it is thought that people perform best when they are allowed to take control of their own work. Nevertheless, the partners will set objectives for the whole business. These objectives will then translate into tasks and targets for each worker, whose performance will be monitored periodically, to ensure that duties assigned are being performed satisfactorily.

Note that only businesses that make good profits can afford to employ several office workers in specialist roles. As a general rule, the larger the organisation, the more specialised the jobs within it.

## Office roles in a medium-sized business

In the partnership example (Figure 1.6), the HR, accounts, receptionist and clerical positions may be filled by persons who will perform more specific functions than the worker in the sole proprietor's business. For example:

- Human resource management helps the partners to recruit new qualified staff, looks after the holiday calendar and takes care of the pension and health schemes of all the employees.
- The accounts executive manages the partnership's finances and reports monthly to the partners on money coming in and going out.
- The receptionist greets clients when they arrive and books appointments for those who contact the business by phone.
- The clerical assistant supports the above three positions, typing, filing and retrieving as necessary.

An advantage for office workers in this type of organisation is that they can work in roles that match their skills and preferences. For example, someone who likes dealing with people would probably make a good receptionist but a poor accountant. The disadvantage, though, is that specialisation could result in jobs becoming too repetitive for employees. They may eventually get bored and want to leave for more challenging positions.

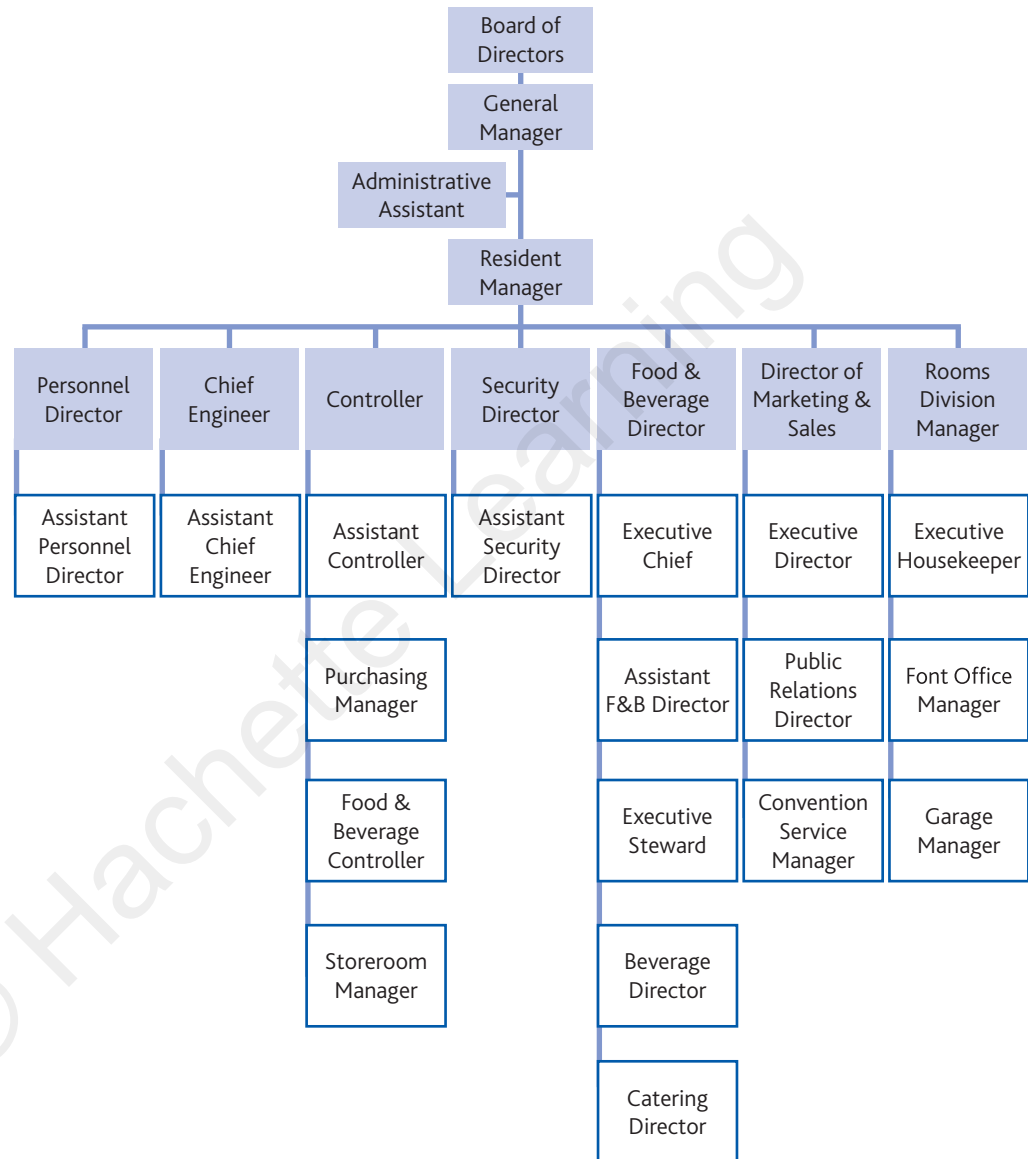
In this type of business, several computers are likely to be used by both partners and clerical staff. These are used to store client records and keep copies of standard documents, such as deeds of sale, wills and relevant legislation. Among the office workers, perhaps only the receptionist may not need a dedicated computer, as their role is mainly to greet visitors, answer calls and respond to basic enquiries.

The accountant, clerical assistant and human resources executive each need a computer, using a mix of specialist and general software. For example, the accountant uses accounting software or spreadsheets, the clerical assistant relies on word processing and document management tools, and the HR executive uses HR software for payroll, recruitment and record keeping. Many of these tasks are now supported by cloud-based platforms, which provide secure storage, easier collaboration and remote access to business records.

## A large business

Examples of large businesses would be utility companies that provide electricity, telephone or water services, as well as large hotel groups. These organisations often employ hundreds of people across many departments. These are often called "companies".

By law, companies are treated as separate legal entities from their shareholders. They are highly structured, with a Managing Director, a Board of Directors and departments responsible for different business functions (Figure 1.7). This structure allows the business to achieve its goals more easily through specialisation, helping the office and the organisation to operate more efficiently.



**Figure 1.7** Organisation chart of a large hotel group

### Office roles in a large business

In large businesses, there are usually separate departments for each major business function. The office staff work closely with colleagues in their own department each day and therefore need strong teamwork skills. While many tasks are done independently, they also need to communicate with other departments whose staff they may not know well. Friendliness, politeness and a cooperative attitude are therefore important qualities for departmental workers.

## SECTION 1

Large businesses have more job types because of their size and complexity. For example, they may employ both a public relations manager and a marketing manager, as these roles are specialised enough to be separate positions. Jobs in large organisations are often more specialised than in partnerships. For instance, a large hotel group may employ a full-time engineer to maintain lighting and heating systems, whereas a legal partnership would only hire an engineer when specific problems arise.

Computers are widely used in large businesses. As with a legal partnership, large businesses use a mix of general and specialist software. An electricity company, for example, requires specialist software to monitor power supply across its network. In both cases, IT specialists are responsible for ensuring that the computer systems and networks operate efficiently for all departments.

Table 1.1 shows the duties and responsibilities of clerks and other administration employees in a large business.

**Table 1.1** Nature of duties and responsibilities

Position	Knowledge and skills
<b>Administrative assistant</b>	<ul style="list-style-type: none"> <li>• General clerical functions</li> <li>• Maintain document storage systems (both manual and electronic/cloud)</li> <li>• Use productivity software (e.g. Microsoft Word, Microsoft Excel)</li> <li>• Google Workspace™ productivity and collaboration tools)</li> <li>• Strong communication and time management skills</li> <li>• Ability to support teams with scheduling and coordination</li> </ul>
<b>Secretary</b>	<ul style="list-style-type: none"> <li>• Produce documents including minutes, reports and correspondence</li> <li>• Maintain accurate office files (digital and physical)</li> <li>• Manage calendars, appointments and meetings</li> <li>• Handle incoming and outgoing communications (calls, email, messaging apps). Order and manage office supplies</li> <li>• Use document management and collaboration tools</li> <li>• Strong literacy, numeracy and organisational skills</li> </ul>
<b>Data entry clerk</b>	<ul style="list-style-type: none"> <li>• Use specialist data-entry and database applications</li> <li>• Enter and process information accurately and quickly</li> <li>• Ability to format and check documents</li> <li>• Familiar with spreadsheets, ERP or CRM systems</li> <li>• Maintain confidentiality and attention to detail</li> </ul>
<b>Human resources clerk</b>	<ul style="list-style-type: none"> <li>• Personable and approachable</li> <li>• Use HR software and databases to manage employee records</li> <li>• Maintain good relationships with staff</li> <li>• Knowledge of labour laws, workplace safety regulations and company policies</li> <li>• Strong digital skills (payroll software, online HR systems)</li> </ul>
<b>Purchasing clerk</b>	<ul style="list-style-type: none"> <li>• Strong numeracy and literacy</li> <li>• Use purchasing and inventory management software</li> <li>• Build and maintain supplier relationships</li> <li>• Research suppliers online to obtain best pricing and quality</li> <li>• Support Purchasing Manager with data analysis and procurement reports</li> </ul>
<b>Marketing clerk</b>	<ul style="list-style-type: none"> <li>• Customer-focused and creative</li> <li>• Assist with content creation for social media, websites and marketing campaigns</li> <li>• Use publishing and design tools (e.g. Canva, Adobe, MS Publisher)</li> <li>• Help with market research and customer engagement</li> <li>• Strong digital and communication skills</li> </ul>
<b>Sales clerk</b>	<ul style="list-style-type: none"> <li>• Customer-focused, skilled in handling enquiries and processing orders</li> <li>• Use sales-order software, point-of-sale systems and CRM platforms</li> <li>• Communicate prices and product details clearly</li> <li>• Strong numeracy, literacy and interpersonal skills</li> </ul>

<b>Transportation assistant</b>	<ul style="list-style-type: none"> <li>• Knowledge of transport and logistics systems, including couriers, shipping and tracking platforms</li> <li>• Use software for logistics scheduling and documentation</li> <li>• Maintain relationships with warehouse and dispatch staff</li> <li>• Strong literacy and numeracy for accurate record keeping</li> </ul>
<b>Records management clerk</b>	<ul style="list-style-type: none"> <li>• Maintain and update records (digital and physical)</li> <li>• Use records management systems and databases</li> <li>• Ensure compliance with data protection policies</li> <li>• Support staff in retrieving information</li> <li>• Strong literacy, numeracy and IT skills</li> </ul>
<b>Customer support/ Call handling assistant</b>	<ul style="list-style-type: none"> <li>• Operate a centralised call-handling system or customer relationship management (CRM) platform to manage incoming calls, emails and online queries</li> <li>• Skilled in using digital phone systems, automated routing and call-management software</li> <li>• Maintain good working relationships with colleagues and ensure professional, customer-focused communication by presenting a friendly and helpful response to all callers or online customers</li> </ul>

### Did you know?

In some companies, employees are deliberately rotated between departments such as accounts, customer service and sales. This deployment strategy helps staff build a wider skill set and prepares them for supervisory or managerial roles.

## Deployment of employees

Because large businesses are at the cutting edge of their field, they often need to adapt to the changing needs of their customers rapidly. For example, businesses may change their departmental structures by creating, merging or removing departments to better meet customer needs or respond to changes in the global economy. Therefore, it sometimes becomes necessary for management to deploy employees, that is, move people into different jobs when the current structure of the business changes.

Employees in large organisations need to be adaptable. This quality is often assessed by the human resources department during interviews. Managers look at how well employees can adjust to change, carry out new tasks with little supervision, and understand the organisation's goals and customer needs. This helps management place employees in roles where they can develop their skills and be creative. The organisation also benefits by having the right person in the right job, which improves workplace efficiency.

### Key terms

**centralised** Organised so that key activities are carried out from a central office

**decentralised** Organised so activities are carried out by separate departments/locations rather than a central office

**scanning** Converting paper documents or images into digital form using a scanner

### Self-check questions

- 1 Give two reasons why the proprietor of a small business will exercise greater control over that business.
- 2 When is a business considered a 'partnership'?
- 3 Why is there more likely to be a job titled 'Chief Engineer' in a large hotel, employing hundreds of people, than in a firm of solicitors employing 50 people?

## Centralisation and decentralisation

Some office functions work best in small individual departments, while others are more efficient when managed from a central area. In other words, office functions can be decentralised or **centralised**.

**Decentralisation** means that support services are located within each department of a company. As a result, each department has its own communication systems (such as direct phone lines, departmental email addresses and internal chat), its own document management system, its own cloud storage folders, and access to printing and **scanning** services. Employees within the department are able to use these services and equipment immediately.

The advantage of decentralisation is that employees can easily access the equipment and resources they need to complete daily tasks, allowing work to be done more quickly without waiting for approval from a central office. However, decentralisation can be costly, as businesses may need to buy multiple sets of equipment, software and licences for each department. It can also lead to duplication of effort, since staff may use different systems and tools, increasing the time and cost of training.

**Centralisation** means that support services are located in one place or managed through a single coordinated system. For example, mail may be handled in a central mailroom, large-scale printing and scanning managed by a reprographics team, and calls, emails and online enquiries routed through a central contact centre or customer relationship management (CRM) system.

The main advantage of centralisation is efficiency. Specialist staff are trained to perform specific tasks accurately and consistently. Resources are easier to manage because the organisation can invest in high-quality equipment and enterprise-level software instead of duplicating systems in each department. Centralisation also improves accountability and control, as responsibility lies with authorised and trained staff.

However, centralisation also has disadvantages. Work can become repetitive and monotonous for employees who perform the same tasks daily, which may lead to low motivation or staff turnover. One way to reduce this is through job rotation, allowing employees to move to different roles over time.

Both systems have strengths and weaknesses. Therefore, many large organisations use a combination of centralised and decentralised support services.



### Case study: Harbour View café

Harbour View café is a family-owned restaurant located in St John's, Antigua. The sole proprietor is Mrs James who makes all major decisions about the business, including creating a menu, hiring employees and ensuring adherence to health and safety rules.

The business currently has three employees: a cashier, a chef and a part-time assistant; all the staff members at Harbour View café perform multiple functions. For instance, the cashier processes orders and organises online food delivery using a tablet device. The assistant performs customer service, does the cleaning and updates the café's social media pages.

The office of the business is small and keeps track of sales and expenses. Mrs James uses accounting software on her laptop to input data about sales and expenses and to pay suppliers. All orders and delivery information are recorded in a cloud system, which allows quick access to data and minimises paperwork.

When Mrs James decided to start delivering food online, she had to reorganise a number of tasks and train employees on how to use online ordering platforms. This is an example of how even small businesses have to adapt their office work to meet customer needs and remain competitive.

#### Questions

- 1 How does Mrs James's role as the proprietor in this small business differ from a manager's role in a large company?
- 2 Why is it important for the cafe to use digital tools to manage orders and finances?
- 3 Why does the cafe need a social media presence?



## Career corner

Do you enjoy organising information, working with people, and helping an office run smoothly? A career as an office clerk could be a great entry point into the world of business. Office clerks support many areas of a business, from answering phones and greeting visitors to filing documents and using software to process information.

### Skills required:

- Good communication and interpersonal skills.
- Strong literacy, numeracy and IT abilities.
- Organisation and attention to detail.
- Ability to adapt to different tasks and responsibilities.

### Tools you'll need:

- A computer with office applications.
- Filing systems (manual or electronic).
- Telephone and email communication systems.
- Printers, scanners and multifunction machines.



## Summary

In this chapter, you have learned to:

- explain the role and functions of the office in supporting business activities
- describe how the office contributes to production, distribution, exchange of goods and services, and the collection, processing, storage, preservation and dissemination of information
- recognise the importance of organisational management and legal control within the office
- analyse how the size and nature of a business affect its office structure, staffing and decision-making processes
- interpret organisational charts to understand types and patterns of relationships in small, medium and large businesses
- identify the nature of duties and responsibilities for different office roles
- explain the concept of deployment of employees and why adaptability is important in larger organisations
- compare the advantages and disadvantages of centralisation and decentralisation of office functions
- discuss how offices use computer hardware and software, including modern digital and cloud-based tools, to support efficiency and communication.

## Practice questions

### Multiple-choice questions

- 1 The inputs that go into the production process are:
  - a land and labour
  - b land, materials, labour and capital
  - c labour and capital
  - d land, materials and capital.
- 2 Dissemination of information means that the information is:
  - a stored
  - b destroyed
  - c altered
  - d distributed.
- 3 The basic skills and knowledge that are most important to office jobs are:
  - a skills in numeracy and literacy
  - b maintaining good working relationships
  - c the ability to use basic computer software applications
  - d all of the above.
- 4 The main objective of any business is to:
  - a find more customers to replace old customers
  - b make sure its employees are always happy in their jobs
  - c make a profit by giving its customers what they want
  - d expand its premises so that it has more space to produce what it produces.
- 5 The main skill unique to both the marketing clerk and the sales clerk is focusing on:
  - a keeping expenses as low as possible
  - b the customer's needs
  - c being efficient
  - d looking after other team members.

### Short-answer questions

- 6
  - a Describe two of the specialised offices/ departments which typically operate in large businesses in two to three lines each.
  - b Apart from manufacturing businesses, what other types of organisations might have a 'production process' for delivering goods and/or services?
- 7
  - a For the sale of a specific item, such as a refrigerator, describe three pieces of data that would be useful to a sales manager.
  - b Name three methods by which information can be disseminated in a business.
  - c Give two reasons why information is collected and processed in a business. Describe EACH reason in four or five lines.
  - d Give two reasons why information is stored in a business. Describe EACH reason in four or five lines.
- 8
  - a Why are workers usually left to get on with their jobs without too much daily supervision in modern offices?
  - b Why does specialisation in job roles mean that workers need to communicate more effectively with their colleagues? Use the example of the legal partnership described in this chapter.
  - c Why is a large business more likely to purchase specialist software than a small business?
- 9 List two pieces of legislation that employees should be aware of and explain their purpose.



## End-of-chapter activity

Find the hidden words in the wordsearch.

specialist   efficiency   costly   replication   expert  
access   monotony   equipment   training   control

T	R	A	I	N	I	N	G	K	M	P	Q	W	E	R
S	P	E	C	I	A	L	I	S	T	B	N	M	X	L
L	O	R	T	N	O	C	H	G	F	D	S	Y	P	O
C	O	S	T	L	Y	A	S	D	F	G	H	N	E	L
Z	X	C	V	B	N	M	Q	W	E	R	T	O	R	I
E	Q	U	I	P	M	E	N	T	A	S	D	T	T	H
P	L	K	J	H	G	F	D	S	A	Z	X	O	V	B
A	C	C	E	S	S	Q	W	E	R	T	Y	N	I	O
R	E	P	L	I	C	A	T	I	O	N	M	O	N	V
E	X	H	M	I	T	Z	X	C	V	B	N	M	Q	W
Y	C	N	E	I	C	I	F	F	E	D	F	G	H	J
T	S	I	L	A	I	C	E	P	S	P	L	M	N	B
N	Q	W	E	R	T	Y	U	I	O	P	A	S	D	F
O	N	Y	N	O	T	O	N	O	M	W	E	R	T	Y

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