

YWCA TORONTO

ESSENTIAL SKILLS FOR EMPLOYMENT



PROFESSIONAL BUSINESS PRACTICES CURRICULUM



A TURNING POINT
FOR WOMEN



Canada

Funded by the Government of Canada's Office of Literacy and Essential Skills.

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FOREWORD



FOREWORD

We would like to thank the Office of Literacy and Essential Skills, Human Resources and Skills Development Canada for funding this project to advance the development and delivery of successful essential skills for employment programs.

The project had two specific objectives:

1. Refine and pilot the literacy and essential skills training currently offered by YWCA Toronto to create a Professional Business Practices Curriculum Model
2. Produce a Compendium of Best Practices in building literacy and essential skills programming that includes the Curriculum Model, information regarding employer partnerships, evaluation tools and program outlines that respond to labour market needs.

We hope that this document, the Professional Business Practices Curriculum Model, will help to build capacity in the field of essential skills training across Canada and support more people to succeed in today's labour market.

At YWCA Toronto, we have developed a substantial menu of training workshops that we could have included here, and that are available to any interested reader. For this Curriculum, however, we chose to select the most cutting edge modules, all of which can be drawn upon and adapted to fit your specific training needs.

This project would not have been possible without the hundreds of participants and graduates from our different programs who enabled us to design our training curriculum materials, and enhance our program delivery. Their input and feedback were invaluable to the Curriculum. These remarkable women continue to inspire us in our work, and we are very proud to share their success stories.

We also wish to thank the skilled and dedicated staff members who piloted our different curriculum modules and lessons over the years, especially Lorraine Dias, Rita Hyde, Joanna Jaskielewicz, Elli Kwan, Mary McCall, Catherine McLean, Annis Owusu-Achaw, Leah Sultan-Khan, Sanna Toelke and all of the other staff members at our 3090 Kingston Road location who have always made the needs of women their first priority, and have contributed enormously to this project.

We would also like to thank:

The External Advisory Committee Employers: Gillian Alwani, Diane Low, Arun Jain and Margo Vanderland for contributing their perspectives as employers.

The Internal Advisory Committee Members: Marilda Tselepis, Dolores Montavez-Ruz, Maisie Raymond-Brown, Tsering Tsomo, Rita Hyde and Joanna Jaskeiwicz for sharing their knowledge, expertise and time.

The Essential Skills for Employment Project Team: Eva Pakyam (Manager, Employment Programs, Scarborough, 3090 Kingston Road) for her vision, expertise and leadership during the many years of piloting programs and curricula such as this; Claire Letemendia (Consultant Editor), Krista Lopes (Researcher and Writer), Marilyn Kennedy (Program Coordinator and Facilitator), and Shawn Abraham (Administrative Assistant) for helping to assemble both the YWCA Toronto Compendium of Effective Practices in Employment Programming, and the Professional Business Practices Curriculum.

We hope that the Curriculum can prove useful to other employment skills training organizations in both the public and private sectors, and to any interested readers. As a learning community development organization, we seek constantly to refine and enhance the services we offer. We would welcome your feedback about the Curriculum model, how you may have tailored it for your target group, and the outcomes that you have captured about best practices in program delivery. By working together and exchanging information and expertise, we can stimulate innovation in the field of essential skills training, and support more Canadians towards rewarding, sustainable employment, personal fulfilment, and broader participation in the economy and society.

If you would like more information about this project, and/or additional supports and resources related to employment and skills development, and the Professional Business Practices Curriculum, please do not hesitate to contact the following YWCA Toronto staff members:

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Please also visit our website: www.ywcatoronto.org for more information about all of our programs.

INTRODUCTION



INTRODUCTION

At YWCA Toronto we have been developing and delivering employment training curricula since 1961. We have created a range of curriculum models that respond to the needs of women to help them learn, practice and enhance their essential skills through our five key Components:

- Career Assessment
- Employability Assessment
- Advanced Employment Preparation and Training
- Placements, Job Coaching and Mentoring
- Job Search and Job Maintenance Support.

In the recent past, we recognized a gap in employment programming for women in our three target groups:

- low-skilled women who need support to enhance their literacy and essential skills levels to find and retain jobs,
- women who have recently become unemployed as a result of recent changes in the economy and labour market and need re-training to upgrade their essential skills, and
- internationally trained professionals and/or new graduates who need additional training to facilitate their transition to the Canadian workplace and culture.

Through this project funded by HRSDC's Office of Literacy and Essential Skills, we were able to deliver a one-time pilot of the YWCA Toronto curriculum that we have been developing and offering through our Skills Development Centre (SDC) for the past five years.

The *Professional Business Practices* Curriculum consists of a series of general employability workshops that showcase YWCA Toronto's best practices in delivering essential skills training. The Curriculum specifically focuses on targeting the nine essential skills identified by Human Resources and Skills Development Canada: reading, document use, numeracy, writing, oral communication, working with others, continuous learning, thinking skills and computer use. In the Curriculum, these skills have been enhanced to address other complementary work readiness training relevant to the Canadian workplace.

HOW WE DEVELOPED THE PROFESSIONAL BUSINESS PRACTICES CURRICULUM MODEL

Since 2005 we have been developing and delivering an innovative essential skills curriculum through our Skills Development Centre (SDC). We have refined this to become the Professional Business Practices Curriculum¹, designed to prepare our participants for sustainable employment and inspire in them a passion for lifelong learning.

The Curriculum Model was developed based on feedback from YWCA Toronto staff members, participants and employer partners. Two advisory committees provided detailed input into the design of the curriculum: an internal advisory committee comprised of YWCA Toronto staff members who have experience in developing and delivering essential skills training, and an external advisory committee comprised of some YWCA Toronto employers.

In May 2010, YWCA Toronto delivered a sample of this curriculum to a group of women through the SDC. The aim of this pilot was to test, capture and refine our best practices in delivering essential skills training. The workshops included:

- Professional Office Management: Oral Communication, Written Communication, Data and Records Management, Office Protocol and Business Etiquette, Organizing Meetings,
- Professional Development: Group Dynamics, Self-Esteem and Self-Talk, Values, Listening Skills, Time Management, Stress Management, Cultural Diversity, Goal Setting, Employer Expectations, and
- Computer Skills: Keyboarding, Computer Concepts, Windows, Email, Internet, Microsoft Word, and Microsoft Excel.

The curriculum modules were offered over a period of ten weeks. Attendance ranged from thirty participants in the Professional Office Management workshops to fifteen participants in the Professional Development and Computer Skills workshops. The pilot delivery included all five Components of our programming model listed above.

¹ For a copy of the Professional Business Practices Curriculum, please contact YWCA Toronto. See the Foreword of this document for our contact information.

The women who participated in the pilot were asked to provide detailed evaluations of the modules by completing paper-based evaluations following each workshop they attended, and taking part in two focus groups. In these evaluations and focus groups, participants made the following comments and recommendations:

- participants learned from both the counsellors and their peers,
- participation enhanced their self-confidence in approaching their employment and life goals,
- many participants recognized that they still had much to learn, and were interested in pursuing more training,
- participants expressed an interest in having access to electronic copies of the resources that they were given during the workshops,
- participants agreed unanimously that they wished the program could have been longer, and
- all participants felt that their employment potential had improved as a result of their involvement at the YWCA Toronto, and voiced their satisfaction with the experience.

PROFESSIONAL BUSINESS PRACTICES CURRICULUM OVERVIEW

The Professional Business Practices Curriculum Modules are divided into four sections: Professional Office Management, Computer Skills, Professional Development, and Continuous Learning. An overview of these sections can be found in the chart below.

Figure 1: Professional Business Practices Curriculum

	Description	Modules
Professional Office Management	These modules focus on developing the basic essential skills needed for working in an office environment. Specific emphasis is placed on the roles and responsibilities involved with administrative positions, in order to help participants to develop skills that are consistent with the Canadian workplace.	<ul style="list-style-type: none"> • Oral Communication • Written Communication (Levels I and II) • Writing in Business Today • Data and Records Management • Office Protocol and Business Etiquette • Organizing Meetings • Employer Expectations • Cultural Diversity • Financial Literacy • Effective Emailing
Computer Skills	These modules focus on developing computer skills. They range from covering basic computer concepts to advanced formatting and functions. The modules are offered in a blended format that includes instructor-led and individual internet-based training.	<ul style="list-style-type: none"> • Keyboarding • Computer Concepts • Windows • Email • Internet • Microsoft Word (Beginner and Intermediate) • Microsoft Excel (Beginner and Intermediate) • Microsoft PowerPoint (Beginner)
Professional Development	These modules focus on a wide range of soft skills that can help participants obtain and maintain employment. They have been adapted from the Discovering Life Skills Training Manuals, published by YWCA Toronto.	<ul style="list-style-type: none"> • Group Dynamics • Listening Skills • Self-Esteem and Self-Talk • Values • Time Management • Stress Management • Goal Setting • Job Retention

	Description	Modules
Continuous Learning	These modules focus on upgrading the essential skills training offered in the other Professional Business Practices curriculum modules. They are internet-based, so that participants can complete them at their own pace from wherever they are most comfortable.	<ul style="list-style-type: none"> • Problem Solving • Project Management • Verbal Communication • Written Communication • Career Management • Customer Service

The core modules of the Professional Business Practices Curriculum focus on essential skills training at a very basic level, but can be readily expanded to accommodate learners with intermediate or advanced skill levels.²

HOW TO USE THE CURRICULUM

The Curriculum is designed in a modular format that allows for flexible delivery. This enables the training to be customized to meet the specific learning needs, objectives, and/or employment goals of any target group. The modules can be offered as stand-alone workshops, or offered in sequence to focus on targeting specific essential skills.

Before delivering the Curriculum, it is important for the instructor to identify the needs and goals of the participant group. The instructor can then customize delivery by offering Modules best suited to the group and may choose to use any other additional materials such as handouts, activities, videos or industry-specific information to complement and enhance the core Curriculum.

EVALUATION OF OUTCOMES

YWCA Toronto has adopted a results-based approach to evaluating our employment programs. This approach allows us to monitor and measure results and demonstrate both quantitative and qualitative outcomes. While celebrating the successes of our participants, we can also facilitate continuous program improvement. We have integrated the United Way Program Effectiveness Organizational Development (PEOD) management systems into our evaluation practices.

We use internal evaluation and data capture systems for each program that we offer, depending on funder requirements. We have developed a participant-focused outcomes documentation and tracking system that enables us to assess employment results for many of our programs. In addition, we have developed some simple research methodologies to document the longer-term outcomes of our programs.³

² See Module A4: Writing in Business Today for an example of the advanced training that we offer.

³ For a sample of our evaluation tools, please see the YWCA Toronto Compendium of Effective Practices in Employment Programming. To request a copy of the Compendium, contact us. See the Foreword of this document for contact information.

ESSENTIAL SKILLS OVERVIEW

ESSENTIAL SKILLS

PRIMARY: CONTINUOUS LEARNING

SECONDARY: THINKING

GOAL

To introduce the nine essential skills and give an overview of each skill and how it relates to the workplace

COURSE DESCRIPTION

This lesson has been designed to be used as a train-the-trainer piece for any instructors who are planning on using the Professional Business Practices modules and who are unfamiliar with the Essential Skills.

This workshop can be used as a train-the-trainer piece for any instructors who are planning on delivering the Professional Business Practices Modules. It introduces the nine essential skills and demonstrates how they relate to the workplace.

LESSON PLAN

Agenda	Topic	Resources
Introduction	Introduction <ul style="list-style-type: none">• Provide an overview of the module and discuss goals	Slide 1-2
OLES	Office of Literacy and Essential Skills (OLES) <ul style="list-style-type: none">• Discuss the role of the Office of Literacy and Essential Skills• Review the Mission of OLES	Slide 3-5
Mission	Mission <ul style="list-style-type: none">• Review the Mission of OLES	Slide 6-7
Understanding Literacy and Essential Skills	Understanding Literacy and Essential Skills <ul style="list-style-type: none">• Give an overview of why essential skills are important• Go to: http://www.hrsdc.gc.ca/eng/workplaceskills/essential_skills/general/complexity.shtml• Provide some examples of the varying levels of complexity of the essential skills	Slide 8-9

Agenda	Topic	Resources
What are the Nine Essential Skills	<ul style="list-style-type: none"> • Review each of the nine essential skills: • Reading, Writing, Document Use, Oral Communication, Working with Others, Thinking Skills, Continuous Learning, Computer Use • Review the table of essential skills, emphasizing typical applications and examples of each 	Slide 10-23
Essential Skills Profiles	<ul style="list-style-type: none"> • Provide an overview of the Essential Skills Profiles 	Slide 24-25
Website information and Links	<p>Go to the following websites and review the information:</p> <ul style="list-style-type: none"> • http://www.hrsdc.gc.ca/eng/workplaceskills/oles/olesindex_en.shtml • http://www.hrsdc.gc.ca/eng/workplaceskills/noc/index.shtml 	Slide 26

WHAT ARE ESSENTIAL SKILLS?⁴

HANDOUT 1

Essential Skills	Typical Applications	Workplace Examples	Community Examples
<p>Reading Understanding Materials written in sentences or paragraphs (e.g. letters, manuals)</p>	<ul style="list-style-type: none"> • Scan for information or overall meaning • Read to understand, learn, critique or evaluate • Analyze and synthesize information from multiple sources or from complex or lengthy texts 	<p>An airline sales agent reads notices on a computer screen, such as special handling requirements or weather information.</p>	<p>You may use this skill to understand a lease agreement for a new apartment</p>
<p>Document Use Finding, understanding or entering information (e.g. text, symbols, numbers) in various types of documents, such as tables or forms</p>	<ul style="list-style-type: none"> • Read signs, labels or lists • Understand information on graphs or charts • Enter information in forms • Create or read schematic drawings 	<p>A bricklayer interprets blueprints to determine the height, length and thickness of walls.</p>	<p>You may use this skill when referring to a bus schedule to plan an outing.</p>
<p>Numeracy Using numbers and thinking in quantitative terms to complete tasks</p>	<ul style="list-style-type: none"> • Make calculations • Take measurements • Perform scheduling, budgeting or accounting activities • Analyze data • Make estimations 	<p>Payroll clerks monitor vacation entitlements to prepare budget and scheduling forecasts.</p>	<p>You may use this skill to calculate deductions on personal tax forms.</p>

⁴ Adapted from What Are Essential Skills?, Human Resources and Social Development Canada, 2009, pp. 1-2. For more information about Essential Skills, visit the Office of Literacy and Essential Skills website: www.hrsdc.gc.ca/eng/workplaceskills/oles/olesindex_en.shtml.

Essential Skills	Typical Applications	Workplace Examples	Community Examples
<p>Writing Communicating by arranging words, numbers and symbols on paper on a computer screen</p>	<ul style="list-style-type: none"> • Write to organize or record information • Write to inform or persuade • Write to request information or justify a request • Write an analysis or a comparison 	<p>Human resources professional write recommendations on issues such as workplace health and safety.</p>	<p>You may use this skill to complete an application for a credit card.</p>
<p>Oral Communication Using speech to exchange thoughts and information</p>	<ul style="list-style-type: none"> • Provide or obtain information • Greet, reassure or persuade people • Resolve conflicts • Lead discussions 	<p>Office clerks take messages and share information by phone and in person.</p>	<p>You may use this skill to explain a food allergy to a server at a restaurant.</p>
<p>Working with Others Interacting with others to complete tasks</p>	<ul style="list-style-type: none"> • Work independently, alongside others • Work jointly with a partner or helper • Work as a member of a team • Participate in supervisory or leadership activities 	<p>Municipal engineers work with technicians, inspectors, and suppliers to complete construction projects.</p>	<p>You may use this skill when working with volunteers to organize a fundraising activity.</p>
<p>Thinking Finding and evaluating information to make rational decisions or to organize work</p>	<ul style="list-style-type: none"> • Identify and resolve problems • Make decisions • Find information • Plan and organize job tasks • Use critical thinking • Use memory 	<p>Paramedics diagnose a patient's condition based on medical charts and their own observations. They use their judgment to start an appropriate treatment plan.</p>	<p>You may use this skill to research and select courses at your local adult learning centre.</p>

Essential Skills	Typical Applications	Workplace Examples	Community Examples
<p>Computer Use Using computers and other forms of technology</p>	<ul style="list-style-type: none"> • Use different forms of technology, such as cash registers or fax machines • Use word processing software • Send and receive emails • Create and modify spreadsheets • Navigate the internet 	<p>Telephone operators use customized software to scan databases for telephone numbers or long distance rates.</p>	<p>You may use this skill when withdrawing or depositing money at an automated teller machine (ATM).</p>
<p>Continuous Learning Participating in an ongoing process of improving skills and knowledge</p>	<ul style="list-style-type: none"> • Learn on the job • Learn through formal training • Learn through self-study • Understand your own learning style • Know where to find learning resources 	<p>Retail sales associates improve their skills and knowledge by attending sales training and reading product brochures.</p>	<p>You may use this skill when attending a first aid course at a community centre.</p>

PROFESSIONAL BUSINESS PRACTICES CURRICULUM



PROFESSIONAL BUSINESS PRACTICES AND ESSENTIAL SKILLS

The following chart identifies which Essential Skills apply to the training modules covered in the Professional Business Practices Curriculum. The chart shows both the primary and secondary essential skills goals, although some modules address more essential skills goals than these.

Essential Skill Impacted - Primary	P
Essential Skill Impacted - Secondary	S

Professional Business Practices Module									
	Reading	Writing	Numeracy	Computer	Document	Thinking	Oral Communications	Working w/Others	Continuous Learning
A1 Oral Communications Skills						S	P	S	
A2 Written Communications Skills I	S	P			S				
A3 Written Communications Skills II	S	P			S				
A4 Writing in Business Today	S	P			S				
A5 Data and Records Management				S	P	S			
A6 Office Protocol and Business Etiquette					S		S	P	
A7 Organizing Meetings		S					S	P	
A8 Employer Expectations							S	P	S
A9 Cultural Diversity						S	S	P	
A10 Financial Literacy			P		S	S			S
A11 Effective Emailing		S		P					
B1 to B10 Computer Skills				P	S	S			
C1 to C8 Professional Development Workshops						S	S		P
D1 to D5 E-Learning				S	S				P

PROFESSIONAL OFFICE MANAGEMENT



MODULE A1

ORAL COMMUNICATION SKILLS

ESSENTIAL SKILLS

PRIMARY: ORAL COMMUNICATION

SECONDARY: WORKING WITH OTHERS, THINKING

GOAL

To learn how to effectively apply verbal and non-verbal communication skills in a business environment in person and on the telephone

COURSE DESCRIPTION

Participants will explore different kinds of verbal and non-verbal communications and learn to use language effectively. The ability to use speech to exchange thoughts and information is an essential skill for the workplace.

LESSON PLAN

Agenda	Topic	Resources
Introduction	Introduction <ul style="list-style-type: none">• Provide an overview of the module and discuss goals• Define communication and emphasize the importance of verbal and non-verbal communication as an essential skill for employment	Slides 1-5
Greetings and Introductions	First Impressions <ul style="list-style-type: none">• Emphasize the importance of making a good first impression• Discuss ways to greet people respectfully in a business environment• Discuss the components of a good handshake• Explain the implications of being too weak or too firm	Slides 6-8

Agenda	Topic	Resources
Greetings and Introductions	<p>Body Language</p> <ul style="list-style-type: none"> • Discuss the ways that body language influences oral communication • Emphasize the importance of appropriate body language and discuss examples <p>Exercise: Body Language</p> <ul style="list-style-type: none"> • Instruct participants to complete the exercise in groups; discuss responses • Show slide on other Body Language Actions <p>Introducing People</p> <ul style="list-style-type: none"> • Discuss tips for introducing people <p>Remembering Names</p> <ul style="list-style-type: none"> • Discuss tips for remembering names <p>Unexpected Guests</p> <ul style="list-style-type: none"> • Discuss tips for handling unexpected guests • Emphasize that different companies have different policies for handling unexpected guests <p>Exercise: Greetings and Introductions</p> <ul style="list-style-type: none"> • Instruct participants to complete the exercise and discuss responses 	<p>Slides 9-11</p> <p>Handout A1-1</p> <p>Slide 11</p> <p>Slides 12-14</p> <p>Slides 15-16</p> <p>Slide 17</p> <p>Slide 18 Handout A1-2</p>
Telephone Etiquette	<p>Answering the Telephone</p> <ul style="list-style-type: none"> • Explain that telephone conversations require the same attention as dealing with people face-to-face • Explain the importance of tone of voice, since the listener cannot see facial expressions and body language • Encourage participants to always ask their employer to clarify their companies' policy for answering the phone 	<p>Slides 19-23</p>

Agenda	Topic	Resources
Telephone Etiquette	<p>Taking a Message</p> <ul style="list-style-type: none"> • Explain how to take a message • Discuss why it is important to take accurate messages <p>Exercise: Taking a Message</p> <ul style="list-style-type: none"> • Instruct participants to complete the exercise; discuss responses <p>Screening Calls</p> <ul style="list-style-type: none"> • Explain why managers may require their calls to be screened • Discuss tips for screening calls in a courteous manner <p>Making and Returning Calls</p> <ul style="list-style-type: none"> • Discuss proper etiquette for making and returning calls <p>Recording Messages</p> <ul style="list-style-type: none"> • Discuss strategies for recording voicemail messages and leaving messages for other people • Emphasize the importance of speaking clearly and leaving a callback number 	<p>Slide 24</p> <p>Slide 25 Handout A1-3</p> <p>Slides 26-28</p> <p>Slides 29-30</p> <p>Slides 31-32</p>
Tactics for Handling Difficult Callers	<p>Non-Stop Talkers</p> <ul style="list-style-type: none"> • Discuss strategies for dealing with non-stop talkers <p>Hard to Understand Callers</p> <ul style="list-style-type: none"> • Discuss strategies for assisting callers that are difficult to understand <p>Complaining Callers Discuss strategies for managing complaining callers</p> <p>Words that Work Review positive vocabulary for handling difficult callers</p> <p>Exercise: Handling Angry and Complaining Callers Instruct participants to complete the exercise in groups; discuss responses</p>	<p>Slide 33-34</p> <p>Slide 35</p> <p>Slides 36-37</p> <p>Slides 38-39</p> <p>Slide 40 Handout A1-4</p>

HANDOUT A1-1 BODY LANGUAGE

In small groups, take turns to role play the body language action listed in the left column of the table below. Record what you think the action communicates in the right column of the table.

Action	Communication
Crossed arms and legs	
Tilted head	
Yawn	
Raising eyebrows	
Pinching bridge of nose	
Staring off into the distance	
Drumming fingers	
Restless leg and foot movements	
Stroking chin	
Looking down	
Doodling	

HANDOUT A1-2 GREETINGS AND INTRODUCTIONS

(Choose the most appropriate answer to the questions below)

1. **You are being introduced to a potential participant. Unfortunately, you have been holding a cold drink and your hands are very cold. You:**
 - a. Smile and greet the person, but keep your hand at your side for fear he or she will think you are cold
 - b. Shake hands, but apologize about the temperature of your hand, explaining you have been holding a cold drink
 - c. Ask the person if he or she will hold your hands until they warm up
 - d. Blow into your palms before extending your hand

2. **Someone has just walked up to you and introduced herself, but you were not listening very well and did not hear her name. You:**
 - a. Do not ask again, because you do not want to look stupid
 - b. Ask again, because you do not want to alienate a potential associate
 - c. Go find someone else so she can introduce herself to him and you can listen

3. **You are the secretary for the senior manager in your department. When your manager introduces you to a new secretary, you:**
 - a. Smile, remain seated, and wait for the new secretary to extend his or her hand in deference to your position
 - b. Stand up and offer your hand
 - c. Get up and hug the new secretary to make him or her feel welcome
 - d. Explain that you are in charge, and as long as he or she wants to play by your rules you will get along fine

4. **A female manager comes into a male manager's office. He should:**
 - a. Rise and greet her
 - b. Keep working
 - c. Look up and greet her
 - d. Stay seated, but enthusiastically say: "Hey, babe, what's up?"

HANDOUT A1-3 TAKING A MESSAGE

Below is a description of a telephone call. Imagine that you are the person taking the message. Using the message form, identify what information is to be included in the message.

On August 30, 2010, Mr. Henry Grant of Smith, Hardy and Locke called your boss, Juanita Delaine. Mr. Grant would like Ms. Delaine to call him at 416.555.9090 as soon as possible. He needs more information to prepare her will. Mr. Grant has no extension number. The call was received at 10:12 in the morning.

To: _____

Date: _____ Time: _____

WHILE YOU WERE OUT

M _____

Of _____

Phone: _____

Area Code	Number	Extension
-----------	--------	-----------

Telephoned		Please call	
Called to see you		Will call again	
Wants to see you		Urgent	
Returned your call			

Message: _____

Call taken by: _____

HANDOUT A1-4 HANDLING ANGRY AND COMPLAINING CALLERS

How would you respond to the following telephone situations? What would you say and do?

HANGING UP IS NOT AN OPTION!

SITUATION # 1

You work in a medical office. A patient who received a duplicate bill is calling. The error was supposed to have been corrected on his last statement, but the charge has shown up again on his current statement.

SITUATION # 2

An important participant called four hours ago needing critical information from your boss. The participant is getting more irate the longer she goes without hearing from your boss, who is out of the office on an appointment. The participant has just called back for a third time.

SITUATION # 3

As a government employee, you work in an agency that has been plagued with recent cutbacks. While the staff has been trimmed, your workload has tripled. Yet the public expects you to continue giving quality service. You have just picked up your ringing telephone to hear a consumer say, "It's about time you answered! What am I doing – interrupting your eight hour coffee break?"

HANDOUT A1-4 (CONTINUED)

SITUATION # 4

You work for a telephone company. A customer is calling because he has been notified that his phone service will be cut off, even though he has paid his bill on time and in full. He is yelling and threatening to sue your organization.

SITUATION # 5

As a customer service representative for a manufacturing company, you frequently take orders for materials and supplies. One of your most important customers is on the telephone complaining that she has not received an order that was guaranteed to arrive this morning. If she does not receive the material, she will be forced to stop production and close down the plant.

MODULE A2

WRITTEN COMMUNICATION SKILLS I

ESSENTIAL SKILLS

PRIMARY: WRITING

SECONDARY: READING, DOCUMENT USE,

GOAL

To learn about different types of written communication and the processes for writing and sending them

COURSE DESCRIPTION

Participants will be introduced to different types of letters, memos and forms used in business and learn how to organize information, choose a writing style, and write and send written correspondence. The ability to communicate by arranging words, numbers and symbols in hard copy and electronically is an essential skill for the workplace.

LESSON PLAN

Agenda	Topic	Resources
Introduction	Introduction <ul style="list-style-type: none">• Provide an overview of the module and discuss goals• Define communication and emphasize the importance of written communication as an essential skill for employment	Slides 1-5
The Writing Process	Getting Organized <ul style="list-style-type: none">• Discuss the steps of the writing process Exercise: Organizing Your Thoughts <ul style="list-style-type: none">• Instruct participants to use the sample letter to complete the exercise; discuss responses	Slide 6 Slide 7 Handout A2-1
Business Letters	Overview <ul style="list-style-type: none">• Discuss the purpose of business letters• Identify different types of letters and show examples	Slides 8-12

Agenda	Topic	Resources
Business Letters	<ul style="list-style-type: none"> • Discuss differences between formal and informal writing • Emphasize that business letters are written in a formal style, as opposed to personal, informal writing <p>The Basics</p> <ul style="list-style-type: none"> • Discuss the basic form and terminology used when writing business letters • Highlight examples of common greetings, closings and abbreviations • Discuss copies and attachments • Emphasize that the second page of a business letter does not go on letterhead paper; instead, the page number should appear at the top or bottom of the page • Note that sometimes in a large document the pages may be numbered to indicate that there are other pages (example: Page 1 of 6) 	Slides 13-19
Business Letters	<p>Exercise: Letter to a Company President</p> <ul style="list-style-type: none"> • Use the sample letter to demonstrate how to write an appropriate letter of request • Instruct participants to write a formal letter to the president of a large company using the information provided on the handout <p>Customer Service Letters</p> <ul style="list-style-type: none"> • Explain the purpose of customer service letters (sent from a company to its customers) • Discuss the reasons for sending customer service letters • Use the sample letter to demonstrate how to write an appropriate customer service letter 	Slide 20-21 Handout A2-2 Slides 22-24
Memos	<p>Creating Memos</p> <ul style="list-style-type: none"> • Discuss the purpose of memos • Explain the structure and format of a memo • Review the sample memo • Emphasize the importance of being brief and clear 	Slides 25-27

Agenda	Topic	Resources
Forms	<p>Using Forms</p> <ul style="list-style-type: none"> • Explain that many companies may have forms that can be completed online • Explain how, when and why forms are used in business • Discuss general tips for understanding and filling in forms <p>Exercise: Filling Out Forms Review the examples of different types of forms on the handouts Instruct participants to fill out the forms and assist them as necessary</p>	<p>Slides 28-30</p> <p>Handout A2-3</p> <p>Handout A2-4 Handout A2-5</p>
Faxes	<p>Sending Faxes</p> <ul style="list-style-type: none"> • Discuss general tips for sending faxes <p>Exercise: Fax Cover Page</p> <ul style="list-style-type: none"> • Instruct participants to fill out the fax cover page with the information provided 	<p>Slide 31-34</p> <p>Handout A2-6</p>
Emails	<p>Sending Emails</p> <ul style="list-style-type: none"> • Discuss general tips for sending emails • Emphasize the importance of making sure that subject lines are clear and concise • Discuss email attachments and scanned documents <p>Exercise: Email Subject Lines</p> <ul style="list-style-type: none"> • Instruct participants to complete the exercise; discuss responses 	<p>Slides 35-36</p> <p>Handout A2-7</p>

<p>Mail</p>	<p>Mail Delivery</p> <ul style="list-style-type: none"> • Discuss common procedures for handling outgoing and incoming mail • Note that different companies may have different procedures; for example, large companies may have a mail centre that is responsible for handling mail while small offices may receive mail directly • Discuss different options for mail delivery in Canada <p>Exercise: Shipping Label</p> <ul style="list-style-type: none"> • Instruct participants to complete the exercise <p>Handling Outgoing and Incoming Mail</p> <ul style="list-style-type: none"> • In large companies they may have a mail centre that is responsible for the mail • Discuss common procedures for handling outgoing and incoming mail 	<p>Slides 38-43</p> <p>Handout A2-8</p> <p>Slides 44-47</p>
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HANDOUT A2-1 ORGANIZING YOUR THOUGHTS

A letter requesting the recipient to perform a service or action generally has four parts.

1. Opening: Tells the recipient why you are writing

Example: "I read your advertisement in the newspaper" or "This confirms our telephone conversation"

2. Purpose: Describes your needs

Example: "We request the following information" or "Please provide the following information"

3. Action: Gives a deadline

Example: "I would appreciate your answer by early next week" or "Please give us your answer by June 5"

4. Polite Expressions: Offer more information and thank the recipient

Example: "If you need more information, please call..." or "I appreciate your help"

Identify the four parts in the sample letter, and write them down in the spaces provided below.

1. Opening

2. Purpose

3. Action

4. Polite Expressions

HANDOUT A2-3 COPY REQUEST FORM

This type of form is used to request printing and copying jobs. The request gives information about weight and colour of stock (the type of paper to be used), quantity, size, binding and delivery. Use the information below to help you fill in the form.

You have to get copies of the Support Request Log printed for the Information Technology Department where you work. Use your name and today's date. You need the printing completed in five days. Your company extension is 2925, the routing code is F96, and the cost centre is 85479. Order 50 lb. offset, green coloured paper, and print on one side only. You require standard size paper, which measures 8.5" x 11". You require padded binding. You have one original, and need 10 pads printed with 100 sheets per pad. Have the printing sent to you when it is completed.

QUICK COPY REQUEST FORM

Please make sure all information is filled out completely and written clearly. If any information is missing, your request will not be completed. Originals must be in good condition. Remove all staples and paper clips.

Employee Name: _____ Date: _____

Department: _____ Ext: _____ Routing Code: _____

Job Name: _____ Cost Centre: _____

Date Needed: _____ Quantity: _____ Number of Originals: _____

STOCK

20 lb. Bond 50 lb. Offset Letterhead Card Stock Supplied
 Other (explain): _____

COLOUR

White Canary Pink Blue Green Other: _____

PRINT

PAPER SIZE

One Side Two Sides 8.5" x 11" 8.5" x 14" 11" x 17" Other: _____

BINDING (Allow two extra days for jobs requiring binding work)

Collate: Yes No Fold: Yes No Staple: Yes No

Padding: Quantity _____ Sheets per pad: 50 100

DELIVER TO

Employee at Routing Code All Employees Mail Department

HANDOUT A2-4 PURCHASE ORDER FORM

You work for Speed Racer Auto Parts. Your boss has asked you to order the following parts from Speed Racer's supplier, A1 Auto Supply:

- 2 boxes of windshield wipers, stock # WW94 (\$26.99/box)
- 1 case of quick grip spray, stock # CG5 (\$14.32/case)
- 2 cases of chrome polish, stock # CP87 (\$72.00/case)
- 7 rolls of racing stripe, stock # RS72 (\$8.97/roll)
- 1 set of floor mats, stock # FM32 (\$18.00/set)
- 5 cases of dry gas, stock # DG16 (\$21.99/case)

Your business address is 543 King Street West, Hamilton, Ontario, L9R 3Y2. Include your business address and use your name as the buyer contact. Have the ordered items sent to Valley Repair Shop at 4879 Portsmouth Street, Hamilton, Ontario, L3K 3M6. Use P.O. number 785236. The vendor contact is Susan Prentice. Use today's date and request a due date of one week from today. Your buyer number is 8954-2226. Ask a colleague to check your order and provide the purchasing agent's signature.

A1 AUTO SUPPLY PURCHASE ORDER

 _____ Purchase Order Number: _____

Buyer	Buyer Contact	Buyer Number
P.O. Issue Date	Vendor	Vendor Contact

Product	Quantity	Unit Price	Total Price	Stock #	Due Date
Total					

Special Instructions/Comments: _____

Ship To: _____

Purchasing Agent's Signature: _____

HANDOUT A2-5 SUPPLY ORDER FORM

Fill out the form below using the following details. Kasha Parks needs to place a supply order for the Records Department at Sunnyside Healthcare. Use today's date. Her office is located at 178 Riverside Drive, Ottawa, Ontario, K3J 2L8. The office phone number is (613) 555-7241, and the fax number is (613) 555-8336. The company customer number is 005987, and the Home Office mailing address is P.O. Box 825, Ottawa, Ontario, K3J 2L8. The order should be shipped to the downtown offices of Sunnyside Healthcare at 199 Elgin Street, Ottawa, Ontario, K3J 2X4. The bill for this order should be sent to the home office mailing address. The purchase number is 8862. A substitution of comparable value and quantity is okay, if necessary.

Items to be ordered are as follows:

- Page 26, Item #785232-D3, Desk Pad Calendars (quantity 10), \$4.00 each
- Page 32, Item #436317-W1, Re-writable DVDs (1 box of 50), \$32 per box
- Page 45, Item #385236-L8, Business Envelopes (1 box of 500), \$17 per box
- Page 53, Item #126578-M2, Mailing Labels (1 box of 1500), \$42 per box
- Page 87, Item #456394-H7, Adjustable 3-hole Punch (quantity 1), \$26 each
- Page 13, Item #597893-G4, Glue Sticks (1 box of 10), \$12 per box

Add up the merchandise total, shipping charge if necessary, and sales tax to get your grand total.

OFFICE PLUS ORDER FORM

Order Placed By: _____ Date: _____ Phone #: _____

CUSTOMER INFORMATION

Customer #: _____

Customer Name: _____

Company Name: _____

Address: _____

City/Prov./Postal Code: _____

Complete if using alternate delivery address

Customer #: _____

Company Name: _____

Contact Name: _____

Ship to Address: _____

City/Prov./Postal Code: _____

PAYMENT INFORMATION

Complete if billing information is different from above

Company Name:

Contact Person:

Address:

City/Prov./Postal Code:

Phone:

BILL TO

Purchase Order #:

Type of Credit Card: Visa Mastercard

Credit Card #:

Expiry Date:

Will you allow a substitution of comparable value and quality if a product is out of stock? Yes No

Page #	Item #	Description	Quantity	Price	Total
				Merchandise Total	
				Shipping	
				Subtotal	
				Local Sales Tax	
				Grand Total	

HANDOUT A2-6 FAX COVER PAGE

You work in the publications department of Tropical Breeze Heating Sales & Service. You have just finished editing the last 15 pages of the new winter catalogue. You must now send the pages to Jacqueline LaCroix at Speedy Printer to make sure that the corrections are included in the new catalogue. You would like her to notify you when she receives the fax. Her fax number is 1-888-555-9634. Fill out the cover page below using today's date and your name and phone number.

Tropical Breeze Heating Sales & Service

192 Islington Avenue

Etobicoke, ON M3D 4S9

FAX COVER PAGE

Date: _____

To: _____

Company/Department: _____

Fax Number: _____

Number of Pages (including cover): _____

Sender's Name: _____

Phone Number: _____

Message: _____

HANDOUT A2-7 EMAIL SUBJECT LINES

Revise these email subjects and messages to show clearly and concisely the purpose of each.

1. Subject:

After some reflection, I would prefer to do the 360 meeting early in the New Year. I have been scheduling one activity after another for the past month and I do not want to treat this exercise like just another task to complete. How is your first week in January?

2. Subject:

I have a couple of questions regarding the labour laws in Ontario. Can you provide answers to the following questions, or alternatively, can you tell me where I might be able to get the answers?

3. Subject:

I am sending this email to all members of our association to notify each new member that effective July 1, 2007 the steering committee meetings will take place every third Thursday for the purpose of reviewing the status of the new constitution that is being prepared.

HANDOUT A2-8 SHIPPING LABEL

Fill out the form below using the following details. You are working for Cozy and Comfy Casual Clothing Company. You have to ship two sweaters, valued at \$100 each, by overnight delivery. Use your own name for the sender and today's date. Your account number is 265896 and your company is to be billed for the shipping. The company address is 589 Neville Point Road, Collingwood, Ontario, H3Z 4X9 and the telephone number is 905-555-4712. The package is going to Gina Romano, 98 Morningside Avenue, Brampton, Ontario, L3R 8S0. Her telephone number is 905-555-6934. She may not be at home to receive the package.

SPEEDY POST SHIPPING LABEL

Speedy Post Delivery

FROM

Sender's Name: _____

Account Number: _____

Telephone Number: _____

Company Name: _____

Address: _____

TO

Recipient's Name: _____

Telephone Number: _____

Company Name: _____

Address: _____

Release Signature

Sign here to authorize delivery without obtaining a signature:

Tracking Number: 88930

Date: _____

Shipping Services

- (Packages under 150lbs)
- Overnight
- Next Business Day

Freight Services

- (Packages over 150lbs)
- Overnight
- Next Business Day

Packaging

- (Please check one)
- Letter
- Box
- Tube
- Other

Payment - Bill To

- (Please check one)
- Sender
- Recipient
- Third Party
- Other:

Declared Value: \$

MODULE A3

WRITTEN COMMUNICATION SKILLS II

ESSENTIAL SKILLS

PRIMARY: WRITING

SECONDARY: READING, DOCUMENT USE,

GOAL

To learn how to write business letters, memos and faxes

COURSE DESCRIPTION

Participants will learn how to format business letters, memos and faxes and be introduced to rules for addressing envelopes. Participants will also learn tips for writing effectively. The ability to communicate by arranging words, numbers and symbols in hard copy and electronically is an essential skill for the workplace.

LESSON PLAN

Agenda	Topic	Resources
Introduction	Introduction <ul style="list-style-type: none"> • Provide an overview of the module and discuss goals • Review different types of business letters and discuss examples (see Module A2 for more details) 	Slides 1-3
Letter Styles	Full Block Letter with Two-Point Punctuation <ul style="list-style-type: none"> • Explain the details of a full block letter with two-point punctuation • Discuss the details of the sample letter Exercise: Full Block Letter <ul style="list-style-type: none"> • Instruct participants to complete the exercise; discuss responses Exercise: Parts of a Letter <ul style="list-style-type: none"> • Instruct participants to complete the exercise; discuss responses 	Slides 4-6 Handout A3-1 Handout A3-2

Agenda	Topic	Resources
Business Writing	<p>Language Tips</p> <ul style="list-style-type: none"> • Discuss various methods for making business writing effective • Emphasize the importance of sentence length, concise writing, natural phrasing and positive wording <p>Exercise: Being Concise</p> <ul style="list-style-type: none"> • Instruct participants to complete the exercise;; discuss responses <p>Exercise: Using Natural Phrases</p> <ul style="list-style-type: none"> • Instruct participants to complete the exercise; discuss responses 	<p>Slides 20-25</p> <p>Handout A3-6</p> <p>Handout A3-7</p>
Grammar	<p>Capital Letters</p> <ul style="list-style-type: none"> • Explain basic rules for using capital letters • Discuss examples of each rule <p>Exercise: Capital Letters</p> <ul style="list-style-type: none"> • Instruct participants to complete the exercise; discuss responses <p>Commas</p> <ul style="list-style-type: none"> • Explain basic rules for using commas • Discuss examples of each rule <p>Exercise: Commas</p> <ul style="list-style-type: none"> • Instruct participants to complete the exercise; discuss responses • Explain about using fonts and justify <p>Note: <i>Canadian grammar is heavily influenced by British and American grammar. Use Canadian grammar rules for the exercises. Sometimes there may be more than one “right” answer.</i></p>	<p>Slides 26-28</p> <p>Handout A3-8</p> <p>Slides 29-30</p> <p>Handout A3-9</p>

HANDOUT A3-1 FULL BLOCK LETTER

Place the parts of the letter below in the box in correct order. Use full block style.

Return Address > 4325 Queen Street East **Date** > September 13, 2010
Toronto, ON M2C 1H3

Inside Address > Mrs. Elaine Fields **Greeting** > Dear Mrs. Fields
3452 Reed Avenue
Toronto, ON M3S 2D1

Body > I am writing in answer to your ad for an office assistant which appeared in yesterday's newspaper. I would like to come in for an interview. I can be reached at 416-555-8146.

Closing > Yours Sincerely **Signature** > Hoda M. Carlisle

HANDOUT A3-2 THE PARTS OF A FULL BLOCK LETTER

Match the numbered parts of the letter with the corresponding names in Column B. Record your responses on the blank lines in Column A.

1 Thrifty Department Store 583 Bank Street Trenton, ON K1D 3L9
October 23, 2010 2
Mr. Adam Bolton 3 Sturdy Furniture Wholesalers 3948 Fern Parkway Belleville, ON K3D 9J4
Dear Mr. Bolton, 4
Will you help us make this year's sales training program the best ever? 5
We are sending the enclosed survey to all of our retailers. We would appreciate it if you could take a few minutes to answer the questions. Your ideas will help us improve our service so that your profits will be even better in the future.
Please return the survey at your earliest convenience.
Sincerely, 6
Jonathan McIntyre 7 President

Column A

- 1) _____
- 2) _____
- 3) _____
- 4) _____
- 5) _____
- 6) _____
- 7) _____

Column B

- a) Signature
- b) Closing
- c) Body
- d) Salutation (Greeting)
- e) Date
- f) Letterhead
- g) Inside Address

HANDOUT A3-3 CUSTOMER SERVICE LETTER

Write the body of a letter that responds to the situation presented below.

Ms. Sanchez has written to your company. She recently purchased a microwave that your company manufactures. The microwave does not work, and she wants to know what she should do with it. Your company's policy is to ask the customer to mail the microwave to your factory at the company's expense. The microwave will be examined at the factory, and if the company finds that it is faulty a new microwave will be sent to Ms. Sanchez. If the microwave works, it will be returned to her at no expense.

**Efficient Appliances Inc.
49502 Dixon Road
Mississauga, ON L4K 2D6
Tel: 905-555-8312 Fax: 905-555-7643**

HANDOUT A3-5 UNDERSTANDING MEMOS

Answer the following questions based on the memo provided.

1. Who is the recipient of the memo?

2. What is the subject of the memo?

3. Who wrote the memo?

4. What information is the writer requesting?

5. Is the tone of the memo appropriate? Explain your answer.

HANDOUT A3-6 BEING CONCISE

Shorten the following sentences to make them more concise.

1. **Your policy is effective for a period of one year.**

2. **Please accept our most sincere apologies for the unreasonable delay and inconveniences you have experienced.**

3. **You will note that these account histories cover transactions from the period starting October 1, 2006 to the present.**

4. **Please be assured that we have corrected the problem and that your account now reflects your correct address.**

5. **In order for us to serve both you and your participant better we would appreciate it if you would please include complete investment instructions with all your future transfer requests.**

HANDOUT A3-7 USING NATURAL PHRASES

Rewrite the phrases below using wording that sounds more natural.

1. Pursuant to your request, attached hereto is a copy of the aforementioned letter.

2. I am writing at this time to acknowledge receipt of your facsimile correspondence dated September 21 and received by us on September 23.

3. I look forward to obtaining the privilege of serving your company's human resources and administrative support needs.

4. In the unlikely event that untoward developments occur in the future, please contact us immediately.

5. Should you have any questions or require further information, please do not hesitate to contact me at any time.

HANDOUT A3-8 CAPITAL LETTERS

Carefully read each of the following sentences. Add capital letters where they are needed

1. several european dentists attended the last few meetings held by the canadian dental association in ottawa, ontario.
2. her husband works as a salesman at a downtown shoe store and her brother is a nurse at a hospital in markham.
3. the st. lawrence river, which flows into the atlantic ocean, is one of the most important rivers in north america.
4. she will spend the summer in kenya and the fall in either switzerland or england.
5. on tuesday afternoon, your uncle and my father went out for lunch at a famous italian restaurant.
6. last year, mrs. sullivan spent valentine's day with her husband in quebec city.
7. your aunt always receives birthday gifts, christmas presents and mother's day gifts from her children.
8. someone from the bookstore telephoned susan anderson to notify her that her copy of alice in wonderland had arrived.
9. the principal said that the next shipment of english and french elementary school textbooks would be arriving in august.
10. monica spent the winter in the arctic taking photographs of glaciers and whales.
11. he went to the store to buy six royal gala apples, a loaf of toastmate bread, and a jar of smiterman's marmalade.
12. last fall, teachers at three winnipeg high schools drafted a letter to the manitoba ministry of education.

HANDOUT A3-9 COMMAS

Use commas to separate the items in the lists below.

1. Buy small medium large and extra-large garbage bags at the hardware store.
2. The manufacturing plant is opening offices in Colborne Ontario Kelowna British Columbia and Lethbridge Alberta.
3. Applicants should send copies of their resumes to Ms. Antoinette Sheffield Director of Marketing Ms. Renu DaSilva Manager of Human Resources and Ms. Sheryl Choi Administrative Assistant.
4. Please send the book club novel in March April May and June.
5. The snowstorm has affected our offices in Montreal Cornwall Ottawa and Nepean.
6. I need to contact Ravi Sandra and Raj to finish the report and mail copies of it to Sunita Kim and Leigh.
7. We are open until 6:00pm on Mondays Tuesdays and Wednesdays.
8. Ms. Parker Miss. Johnstone Mrs. Stanford and Mr. Underwood will be joining us at the meeting.

MODULE A4

WRITING IN BUSINESS TODAY

ESSENTIAL SKILLS

PRIMARY: WRITING,

SECONDARY: READING, DOCUMENT USE

Note: The core modules of the Professional Business Practices Curriculum focus on essential skills training at a very basic level. This Module has been included to show how the Curriculum can be adapted to accommodate learners with intermediate or advanced skill levels.

GOAL

To learn how to write effectively in order to achieve results.

COURSE DESCRIPTION

Participants will learn about contemporary practical writing tools, strategies and techniques that they can apply in their work setting. The ability to communicate by arranging words, number and symbols in hard copy and electronically is an essential skill for the workplace.

LESSON PLAN

Agenda	Topic	Resources
Introduction	Introduction <ul style="list-style-type: none">• Provide an overview of the module and discuss the objectives• Review the agenda items • Ask participants for their priority objectives. Record them	Slide 1-5 FC

Agenda	Topic	Resources
<p>Warm up Questions</p>	<p>Exercise: Writing at Work Today</p> <ul style="list-style-type: none"> • Break the group into pairs and handout the questions have them work together to find the answers. Review answers with group. • Answers: <ol style="list-style-type: none"> 1) It means that a reader reads some writing once and understands it immediately. <ul style="list-style-type: none"> --Readability—average population—grade 8, home page of a web site grade 6 level, business writing—grade 10 good level 2) The trend is to simplify and use less. 3) 15 to 20 --Sentence length—20 years ago average in novel was 20, today 12-14 <ul style="list-style-type: none"> -Mass market books such as Harlequin—7-8 words --The trend is to use fewer words. 4) -Both techniques are good for emphasis but they slow down our reading and take up more space -All caps may slow reading by as much as 15% and take 30% more space. 5) 50 6) The trend is to shorten paragraphs, and one-sentence paragraphs are common in web writing. 7) They present information in condensed form, are easy to read and easier to write than constructing paragraphs. 8) Top left, usually read first and last sentence, bottom right 9) Shorter writing, shorter attention spans <ul style="list-style-type: none"> -More lists or point form 10) 80-90% 11) 30-40% is recommended by professional writers 12) 5-10 minutes 13) 4-5,000 from technology, jargon, slang (teenagers), media 14) Place for the eye to rest, brain can absorb information—visual punctuation; adds to the esthetics of a document or screen 15) Every two years; what a student learns in a technical program would be out of date after they graduate 3-4 years later 16) harder on the eyes because of the resolution on the screen --we do not blink as often, eyes become drier, more fatigued 17) Every 30 minutes 18) More acronyms and short forms 	<p>Slide 6 Handout A4-1</p> <p>Answer Key A4-1</p>

Agenda	Topic	Resources
Organizing	<p>Organizing Your Information</p> <ul style="list-style-type: none"> • Definition • Organizing Guidelines <p>Commonly used Sequence</p> <p>Advantages to This Structure</p> <p>Example of Most Important First Structure (Email)</p> <ul style="list-style-type: none"> • Variation: Persuasive Messages • The least important – first structure also works well where you are presenting a controversial message. In this type of communication you present your reasons or analysis first to build your argument and show the reader how you reached your conclusions before you make your recommendations. • Example of a Marketing Letter • Variation: Negative Messages • Examples of Short Negative Messages 	<p>Slide 23</p> <p>Slide 24</p> <p>Slide 25</p> <p>Slide 26-27</p> <p>Slide 28</p> <p>Slide 29-30</p> <p>Slide 31</p> <p>Slide 32</p> <p>Slide 33</p>
Headings	<p>Headings</p> <ul style="list-style-type: none"> • Definition • Example of Headings <p>Point Form</p> <ul style="list-style-type: none"> • Explain why it is used • Examples of Point Form 	<p>Slide 34</p> <p>Slide 35–37</p> <p>Slide 38-39</p> <p>Slide 40</p>
	<p>Exercise: Identify Headings</p> <ul style="list-style-type: none"> • Instruct participants to identify the headings that can be used in the invitation (see answer Key) • Debrief in large group. 	<p>Slide 41</p> <p>Handout A4-3</p> <p>Answer Key</p>

Agenda	Topic	Resources
Composing Readability	Composing <ul style="list-style-type: none"> • Readability Definition • Characteristics of Readable Writing • Examples Longer/Shorter 	Slide 42 Slide 43 Slide 44
Word Choice	Guidelines for Word Choice Word Alternatives <ul style="list-style-type: none"> • Review the table Guideline for Wordy Phrases <ul style="list-style-type: none"> • Definition • Eliminate Wordy Phrases • Examples Guidelines for Redundancies <ul style="list-style-type: none"> • Definition • Examples Guideline for Technical Words <ul style="list-style-type: none"> • Review Jargon and Acronyms Definition Examples of Jargon Examples of Acronyms Exercise: Planning Practice	Slides 45-46 Slide 47 Slide 48 Slide 49 Slide 50 Slide 51 Slide 52 Slide 53 Slide 54 Slide 55 Slide 56 Handout A4-4

Agenda	Topic	Resources
<p>Sentences</p> <p>Sentence Structure Tips</p>	<p>Sentences</p> <ul style="list-style-type: none"> • Review Definition • Guidelines for Sentence Length • Examples 	<p>Slide 57</p> <p>Slides 58-59</p> <p>Slides 60-61</p>
	<p>Exercise: Sentence Practice</p>	<p>Slide 62</p>
	<p>Unclear Reference for ‘This.’</p> <ul style="list-style-type: none"> • Review explanation 	<p>Slides 63</p>
	<p>Example</p> <ul style="list-style-type: none"> • Discuss examples 	<p>Slides 64</p>
	<p>Using the Structure ‘The Reason is because’</p> <ul style="list-style-type: none"> • Review information 	<p>Slides 65</p>
	<p>Example</p>	<p>Slide 66</p>
	<p>The Difference Between ‘That’ and ‘Which’</p> <ul style="list-style-type: none"> • Review information 	<p>Slide 67</p>
	<p>Examples</p>	<p>Slide 68</p>

Agenda	Topic	Resources
Active/ Passive	<p>Active and Passive Voice</p> <ul style="list-style-type: none"> • Review Definition • Active Voice • Passive Voice • Examples <p>Combining Active and Passive Voice</p> <p>Alternatives to the Passive Voice</p> <ul style="list-style-type: none"> • Review information <p>Examples</p> <p>The Impersonal Passive</p> <p>Examples</p> <p>Exercise: Active Voice</p> <ul style="list-style-type: none"> • Go around the room and ask for volunteers to read their answers. • Debrief in large group. 	<p>Slide 69</p> <p>Slide 70</p> <p>Slide 71</p> <p>Slide 72</p> <p>Slide 73</p> <p>Slide 74</p> <p>Slide 75</p> <p>Slide 76</p> <p>Slide 77</p> <p>Slide 78</p> <p>Handout A4-7</p>
Paragraphs	<p>Paragraphs Definition</p> <ul style="list-style-type: none"> • Discuss with group <p>Guidelines for Readable Paragraphs</p> <ul style="list-style-type: none"> • Review guidelines <p>Exercise: Identify Paragraphs</p>	<p>Slide 79</p> <p>Slides 80-82</p> <p>Slide 83</p> <p>Handout A4-8</p>

Agenda	Topic	Resources
Quick Tips	<p>Quick Tips for Composing Emails</p> <ul style="list-style-type: none"> Review tips <p>Organizing Your Writing Time</p> <ul style="list-style-type: none"> Review points <p>Banishing Writer’s Block</p> <ul style="list-style-type: none"> Review points <p>Examples of Openings</p>	<p>Slide 84-85</p> <p>Slides 86</p> <p>Slide 87</p> <p>Slide 88</p>
Tone	<p>Creating the Right Tone</p> <ul style="list-style-type: none"> Review definition <p>Guidelines for Creating the Right Tone</p> <ul style="list-style-type: none"> Discuss points <p>Tone in Email</p> <ul style="list-style-type: none"> Review points <p>Examples of Different Tones in Email</p> <ul style="list-style-type: none"> Review examples <p>Exercise: Tone practice</p>	<p>Slide 89</p> <p>Slide 90-91</p> <p>Slide 92-93</p> <p>Slide 94-96</p> <p>Slide 97 Handout A4-9</p>

Agenda	Topic	Resources
Formatting	Formatting Definition <ul style="list-style-type: none"> • Review • Margins • Typefaces • Emphasis 	Slide 98 Slide 99 Slide 100 Slide 101-102
Proofreading	<ul style="list-style-type: none"> • Ask participants what techniques they use to proofread their work. • Review Guidelines for Proofreading Exercise: Proofread	FC Slide 103-104 Slide 105 Handout A4-10
Final Editing	Final Editing Guidelines at a Glance <ul style="list-style-type: none"> • Review points Exercise: Final editing	Slide 106-107 Slide 108 Handout A4-11

HANDOUT A4-1 WARM-UP QUESTIONS

- 1) What does readability mean?
- 2) What is the trend in using punctuation?
- 3) What is considered a good average number of words per sentence in writing?
- 4) What is the effect of using all capital letters or bold?
- 5) How many e-mails do we receive on average each day?
- 6) What is the trend in paragraph use?
- 7) What are the advantages of using point form or lists?
- 8) When people skim, where do they read on a page or screen?
- 9) What is the way the electronic media has influenced our writing?
- 10) What % of an organization's communication is through e-mail on average?
- 11) What % of your writing time is recommended for editing?
- 12) How long do we take on average to answer an e-mail?
- 13) How many new words come into English every year?
- 14) What is the importance of white spaces on documents?
- 15) How often is the information in the world doubling?
- 16) How is online reading different from hard copy?
- 17) How often is a novel published in the U.S.?
- 18) How is text messaging changing our writing?

HANDOUT A4-1 WARM-UP QUESTIONS

ANSWERS

1)

2)

3)

4)

5)

6)

7)

8)

9)

10)

11)

12)

13)

14)

15)

16)

17)

18)

HANDOUT A4-2 EMAIL SUBJECTS AND MESSAGES

Revise these email subjects and message to clearly and concisely give the purpose of each. Revise the subject if needed.

1. Subject:

After some reflection, I would prefer to do the 360 meeting early in the New Year. I have been scheduling one activity after another for the past month and I do not want to treat this exercise like just another task to complete. How is your first week in January?

2. Subject:

I have a couple of questions regarding the labour laws in Ontario. Can you provide answers to the following or alternatively can you tell me of where I might be able to get the answers?

3. Subject:

I am sending this email to all members of our association to notify each and every new member that effective July 1, 2007, the steering committee meetings will meet every third Thursday for the purpose of reviewing the status of the new constitution that is being prepared.

HANDOUT A4-3 IDENTIFY HEADINGS

Identify headings that can be used in this Invitation.

INVITATION TO PARTICIPATE IN EMPLOYEE SATISFACTION SURVEY JUNE 1-15

Beginning June 1, you will have the opportunity to participate in our bi-annual, online employee satisfaction survey, conducted for us by Vendor.

I would appreciate if each of you would take a few minutes to complete it because it will only be of value if everyone takes the opportunity to give us honest feedback on your work experience here.

A summary of the results will be shared with you in the fall.

The survey is to be completed online. On June 1, Vendor will be sending a password and website link to your work email address. These will allow you to access Vendor's secure website and complete the survey.

I assure you that the survey results will remain confidential and anonymous and will be reported only in aggregate form by either job or department. The password that you will receive will be generated randomly by the IT server at Vendor, and no record will be kept anywhere. All groups will consist of a minimum of seven people.

Thanks to the generosity of our senior management, we will be offering incentives to those who complete the survey during the first week. Once the survey is completed you will receive instructions on how to participate in a draw for prizes.

If you have any questions or would like further details on the survey process, please feel free to contact me (joe.pres@organization.ca and 416 123-4567) or Sherri Brown (sherri.brown@organization.ca and 416 123-7890). Sherri is co-ordinating the implementation of the survey.

I urge each of you to take the time to give us your candid, confidential, and anonymous feedback and I offer a special thanks to each of you for your contribution.

HANDOUT A4-2 ANSWER KEY

INVITATION TO PARTICIPATE IN EMPLOYEE SATISFACTION SURVEY JUNE 1-15

Beginning June 1, you will have the opportunity to participate in our bi-annual, online employee satisfaction survey, conducted for us by Vendor.

I would appreciate if each of you would take a few minutes to complete it because it will only be of value if everyone takes the opportunity to give us honest feedback on your work experience here.

FALL REPORTING

A summary of the results will be shared with you in the fall.

ONLINE COMPLETION

The survey is to be completed online. On June 1, Vendor will be sending a password and website link to your work email address. These will allow you to access Vendor's secure website and complete the survey.

CONFIDENTIALITY AND ANONYMITY

I assure you that the survey results will remain confidential and anonymous and will be reported only in aggregate form by either job or department. The password that you will receive will be generated randomly by the IT server at Vendor, and no record will be kept anywhere. All groups will consist of a minimum of seven people.

INCENTIVE PRIZES

Thanks to the generosity of our senior management, we will be offering incentives to those who complete the survey during the first week. Once the survey is completed you will receive instructions on how to participate in a draw for prizes.

QUESTIONS

If you have any questions or would like further details on the survey process, please feel free to contact me (joe.pres@organization.ca and 416 123-4567) or Sherri Brown (sherri.brown@organization.ca and 416 123-7890). Sherri is co-ordinating the implementation of the survey.

THANKS

I urge each of you to take the time to give us your candid, confidential, and anonymous feedback and I offer a special thanks to each of you for your contribution.

HANDOUT A4-3 PLANNING PRACTICE

Draft an email to your manager recommending one change that will benefit your department or organization as a whole.

Reader(s)

Main Purpose

What do you want the reader(s) to know or do after reading your communication?

Subject Line

Opening Statement

Main Content

Key points and sequence.

Closing (optional)

Repetition of main purpose, appreciation, next steps, deadline.

HANDOUT A4-4 SENTENCE

Edit these sentences to make them more readable.

1. It would be very much appreciated if an outline of those initiatives that are to be considered by the committee for inclusion in the report could be returned to this desk by the date of May 30, 2007.

2. It is mutually agreed that arrangements will be made for a Union representative to interview each new employee who is eligible to be a member of the Union once during the first thirty (30) days of employment for the purpose of informing such employee of the existence of the Union in the organization and of ascertaining whether the employee wishes to become a member of the Union.

HANDOUT A4-6 SENTENCE

PRACTICE

Combine sentences in the following paragraph.

1. I believe that we should all do volunteer work in our communities. I know that there isn't always a lot of extra time available. But we should make the extra time. Instead of sitting down to watch television, we should do something useful. We could spend two hours with a handicapped child. We could take a fatherless young boy to a ball game. We can help even if we can't find time to leave home. We can volunteer our services from inside our homes. For example we can make telephone calls and type letters. Or we can simply stuff envelopes and put stamps on them. There are hundreds of ways we can volunteer our services to the community. Let's share some happiness with someone else. Let's volunteer our services today.

Indicate how you would revise the following using shorter sentences.

2. Many workers are feeling stressed about juggling their paid work and family responsibilities as indicated in a survey by the health and wellness department where more than 80% of the respondents reported that this stress affected their work absences, productivity and decisions and lowered their ability to enjoy their personal time with their family.

HANDOUT A4-7 ACTIVE VOICE

Rewrite each of these sentences in the active voice, simplifying where possible and making any other changes that are necessary.

1. Each department has been asked to choose a representative to work on the task force.

2. Lack of management talent in the near future was identified as a concern by the planning unit.

3. One-day workshops on managing diversity are given to all new supervisors to teach them about different cultures and races and their own gender biases.

4. The mail survey was conducted during 2006 and the telephone interviews were conducted during the first quarter of 2007.

5. The revised policy will be presented at the next meeting of the Board.

6. A requisition order has to be completed by each manager for the purchase of new equipment.

7. An in-depth statistical analysis was prepared from data that they had accumulated over a six-month period.

HANDOUT A4-8 PARAGRAPH

Indicate where the paragraph breaks would occur in this text.

One third of Canadians describe themselves as workaholics according to a new Statistics Canada report. The data collected in 2005 found that 31 per cent of working adults aged 19 to 64 identify themselves as workaholics and this number has not changed since data was first collected 15 years ago. Workaholics are defined as having an attached exaggerated importance to their work and being over dedicated and perhaps overwhelmed by their jobs. Some thrive on hard work and wear their addiction like a badge of honour while others are forced into it, often working in industries with extremely heavy workloads and long hours. Two groups—management and trades—had a higher percentage of self-defined workaholics than the average while professionals and clerical and technical workers fell below average. The report speculated that professionals such as doctors and lawyers are more likely to accept longer hours as part of their jobs. The abundance of workaholics in the trades is likely driven by the shortage of skilled labour at a time when demand is booming and some of them are self-employed. People who work long hours were more likely to report their health as fair or poor, were more stressed out and had trouble sleeping. They found no more pleasure and satisfaction in their work than non-workaholics. Workaholics were no happier with their income, not driven by financial reasons. Workaholics also report that they probably have trouble using their time effectively. More than half—56% felt they did not have time for fun, far higher than the 34% who non-workaholics who said the same. They were more likely to feel rushed, trapped in a daily routine and unable to accomplish what they set out to at the beginning of the day.

HANDOUT A4-9 TONE

For each of these, write a more personal style.

1. In regard to the problems that have been encountered, a review has been conducted into the faulty component and the following malfunctions were noted.

2. If any further assistance is required, the manager or myself may be contacted.

3. The completed request form is to be duly submitted to this office prior to January.

4. As per our discussion, enclosed are the documents for perusal prior to the meeting scheduled for next Monday at 2:00 p.m.

HANDOUT A4-10 PROOF READ

Canadian Museum of Civilization
Box # 3100 Laurier Street Sta B
Hull, Quebec

Dear Counselor,

I understand that you sometimes have assignments for freelance proofreaders. While I realize that there may be nothing available at present, I would be grateful if you would place my letter on file.

I can only hope that it is worth mentioning that my main reading interest are mystery, romance, and biographical stories. I have read numerous books and I believe I have a healthy idea of what appeals to readers.

I would be more than happy to submit a report or sample manuscript, if you would care to send one. I will submit a resume upon request.

Your sincerely

(HRPAO Update)

HANDOUT A4-11 FINAL EDITING

You have been asked to organize a training seminar on emergency first aid and CPR for your department. Draft an email to your colleagues to find out who will attend using the relevant details that follow.

the Canadian Red Cross is fully recognized by the Ontario Workplace Safety and Insurance Board as an accredited First Aid training agency.

Participants receive a certification card; retesting every three years

the Canadian Red Cross provides the training.

text: Canadian Red Cross First Aid & CPR Manual

content covers how to respond to emergencies, the EMS system, 3 key principles in First Aid - Check, Call, Care, how to deal with airway emergencies, breathing and circulation emergencies, First Aid for respiratory and cardiac arrest

deadline for sign up: April 15

The Canadian Red Cross has launched its revised First Aid & CPR program Prepare for Life™ that incorporates new international guidelines for first aid and cardiopulmonary resuscitation (CPR).

The Canadian Red Cross First Aid Program is approved under federal health and safety regulations and is recognized by Health and Welfare Canada.

time: 9 to 4

course length: 6 hours

date: May 4

The course is taught by certified Red Cross First Aid Instructors. These individuals are trained to create a learner-centred, interactive instructional environment.

MODULE A5

DATA AND RECORDS MANAGEMENT

ESSENTIAL SKILLS

PRIMARY: DOCUMENT USE

SECONDARY: COMPUTER USE, THINKING

GOAL

To learn about the importance of accurate and efficient data and records management in the workplace

COURSE DESCRIPTION

Participants will learn about the basic concepts of data and records management, including file management, and the stages of records management, retention and disposition. Finding, recording, evaluating and keeping track of information is an essential skill for the workplace.

LESSON PLAN

Agenda	Topic	Resources
Introduction	Introduction <ul style="list-style-type: none">• Provide an overview of the module and discuss goals• Define records management and emphasize its importance as an essential skill for employment	Slides 1-6
Records Management	Types of Records <ul style="list-style-type: none">• Discuss traditional record keeping (paper-based) versus modern record keeping (electronic)• Highlight the differences between physical and digital information and review examples of each• Emphasize that only original copies of information containing original signatures are admissible in a court of law; storing these documents securely is important• Discuss questions on slide 9	Slides 7-9

Agenda	Topic	Resources
Records Management	<p>The “Life Cycle” of a Record</p> <ul style="list-style-type: none"> • Emphasize that proper records management ensures information is available for use when required • Review the phases of the records management “life cycle” <p>Emergency Preparedness</p> <ul style="list-style-type: none"> • Discuss the importance of emergency preparedness in light of events such as blackouts or power surges that can cause businesses to lose their records • Emphasize that all records need to be protected against loss and stored in ways that safeguard them against damage <p>Personal Information</p> <ul style="list-style-type: none"> • Review guidelines for collecting and storing personal information • Strongly emphasize the legal importance of obtaining consent when gathering and using personal information • Encourage participants to ask their employers about legislation and specific company protocols for dealing with personal information 	<p>Slide 10</p> <p>Slides 11-12</p> <p>Slides 13-14</p>
Filing	<p>File Maintenance</p> <ul style="list-style-type: none"> • Explain what file maintenance is and why it is important <p>Filing Terminology and Rules</p> <ul style="list-style-type: none"> • Review filing terminology and show examples • Review rules for filing paper documents 	<p>Slides 15-16</p> <p>Slides 17-20</p>
Filing	<p>Alphabetic Classification</p> <ul style="list-style-type: none"> • Introduce participants to the rules for alphabetic classification <p>Exercise: Alphabetic Filing</p> <ul style="list-style-type: none"> • Instruct participants to complete the exercise and then review and provide answers 	<p>Slides 21-32</p> <p>Handout A5-1</p>

Agenda	Topic	Resources
Filing	<p>Other Classifications</p> <ul style="list-style-type: none"> • Introduce participants to alphabetic-geographic, numeric, chronological and alpha-numeric classifications <p>Exercise: Filing by Various Classifications</p> <ul style="list-style-type: none"> • Instruct participants to complete the exercise and then provide answers 	<p>Slides 34-40</p> <p>Handout A5-2</p>
Storing, Retaining and Disposing of Records	<p>Storing Records</p> <ul style="list-style-type: none"> • Review the general process for storing records • Emphasize that participants should check with their organization to learn specific procedures <p>Retention and Disposition of Records</p> <ul style="list-style-type: none"> • Review general procedures for retaining and disposing of records 	<p>Slides 41-43</p> <p>Slides 44-46</p>
Clerical Test	<p>Exercise: Clerical Test</p> <ul style="list-style-type: none"> • Instruct participants to complete the exercise; discuss the answers 	<p>Slide 47</p> <p>Handout A5-3</p>

HANDOUT A5-1 ALPHABETIC FILING

List the following names of organizations in alphabetical order.

Falcon Machinery Limited
Kerr Knife Sharpening
A. J. Bradshaw & D. Hickson Ltd.
404 Rest Stop
J. J. McCoy & Sons
Hilton Railways Inc.
Hi-Wave Radio Co.

Kelly Business Associates
Southeast Spice Manufacturers
X-Ray Sales
South East Asia Travel Agency
St. Christopher's General Store

1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	

HANDOUT A5-1 (ANSWERS) ALPHABETIC FILING

List the following names of organizations in alphabetical order.

Falcon Machinery Limited	Kelly Business Associates
Kerr Knife Sharpening	Southeast Spice Manufacturers
A. J. Bradshaw & D. Hickson Ltd.	X-Ray Sales
404 Rest Stop	South East Asia Travel Agency
J. J. McCoy & Sons	St. Christopher's General Store
Hilton Railways Inc.	
Hi-Wave Radio Co.	

1	404 Rest Stop
2	404 Rest Stop
3	Falcon Machinery Limited
4	Hilton Railways Inc.
5	Hi-Wave Radio Co.
6	J. J. McCoy & Sons
7	Kelly Business Associates
8	Kerr Knife Sharpening
9	South East Asia Travel Agency
10	Southeast Spice Manufacturers
11	St. Christopher's General Store
12	X-Ray Sales

HANDOUT A5-2 FILING BY VARIOUS CLASSIFICATIONS

List the following items in:

- a. Numeric order by account number
- b. Alphabetic order by customer name
- c. Alphabetic-geographic order

Account # 42406
Susan Decomb
87 Rockefeller Road
Churchill, MB
R7K 3E0

Account #
L. Joan Glassman
822 Rue del Mar
Dorval, PQ
H7S 3F9

Account # 0600
B. H. Columbell
8563 Beechwood Crescent
Moncton, NB
E7N 3M1

Account # 3460
R. M. Columbel
67 East Street
Orillia, ON
L3B 6Q2

Account # 3849
R. L. Smith-Jones
839 Fourth Avenue
Edmonton, AB
T9F 3S0

Account # 5083
Nelson M. Tessell
86 Hillmount Street
Orillia, ON
L3R 4U8

Account # 50277
Betha MacMillian
496-8000 King Street
Vancouver, BC
V6X 6S1

Account # 1009
Louis St. Patrick
5893 Mammoth Path
Richmond, BC
V9S 3U2

Account # 50272
L. J. Glassman
397 Runner Way
Yellowknife, NT
X0L 4T9

Account # 0067
Cathy M. Tessel
56 Major Drive
Halifax, NS
B3B 8L9

Account # 85394
Rodrigo de Guzman
589 Willowdale Road
Calgary, AB
T3C 2X0

Account # 3842
Edgar MacMillian
458 Ridge Road, Apt. 835
Brandon, MB
R4D 2P6

HANDOUT A5-2 (CONTINUED)
FILING BY VARIOUS CLASSIFICATIONS

	Numeric	Alphabetic	Alphabetic-Geographic
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			

**HANDOUT A5-2 (ANSWERS)
FILING BY VARIOUS CLASSIFICATIONS**

	Numeric	Alphabetic	Alphabetic-Geographic
1	Account # L. Joan Glassman 822 Rue del Mar Dorval, PQ H7S 3F9	Account # 3460 R. M. Columbel 67 East Street Orillia, ON L3B 6Q2	Account # 85394 Rodrigo de Guzman 589 Willowdale Road Calgary, AB T3C 2X0
2	Account # 0067 Cathy M. Tessel 56 Major Drive Halifax, NS B3B 8L9	Account # 0600 B. H. Columbell 8563 Beechwood Crescent Moncton, NB E7N 3M1	Account # 3849 R. L. Smith-Jones 839 Fourth Avenue Edmonton, AB T9F 3S0
3	Account # 0600 B. H. Columbell 8563 Beechwood Crescent Moncton, NB E7N 3M1	Account # 42406 Susan Decomb 87 Rockfeller Road Churchill, MB R7K 3E0	Account # 1009 Louis St. Patrick 5893 Mammoth Path Richmond, BC V9S 3U2
4	Account # 1009 Louis St. Patrick 5893 Mammoth Path Richmond, BC V9S 3U2	Account # 85394 Rodrigo de Guzman 589 Willowdale Road Calgary, AB T3C 2X0	Account # 50277 Betha MacMillian 496-8000 King Street Vancouver, BC V6X 6S1
5	Account # 3460 R. M. Columbel 67 East Street Orillia, ON L3B 6Q2	Account # 50272 L. J. Glassman 397 Runner Way Yellowknife, NT X0L 4T9	Account # 3842 Edgar MacMillian 458 Ridge Road, Apt. 835 Brandon, MB R4D 2P6
6	Account # 3842 Edgar MacMillian 458 Ridge Road, Apt. 835 Brandon, MB R4D 2P6	Account # L. Joan Glassman 822 Rue del Mar Dorval, PQ H7S 3F9	Account # 42406 Susan Decomb 87 Rockfeller Road Churchill, MB R7K 3E0

7	Account # 3849 R. L. Smith-Jones 839 Fourth Avenue Edmonton, AB T9F 3S0	Account # 50277 Betha MacMillian 496-8000 King Street Vancouver, BC V6X 6S1	Account # 0600 B. H. Columbell 8563 Beechwood Crescent Moncton, NB E7N 3M1
8	Account # 5083 Nelson M. Tessell 86 Hillmount Street Orillia, ON L3R 4U8	Account # 3842 Edgar MacMillian 458 Ridge Road, Apt. 835 Brandon, MB R4D 2P6	Account # 0067 Cathy M. Tessel 56 Major Drive Halifax, NS B3B 8L9
9	Account # 42406 Susan Decomb 87 Rockfeller Road Churchill, MB R7K 3E0	Account # 0067 Cathy M. Tessel 56 Major Drive Halifax, NS B3B 8L9	Account # 50272 L. J. Glassman 397 Runner Way Yellowknife, NT X0L 4T9
10	Account # 50272 L. J. Glassman 397 Runner Way Yellowknife, NT X0L 4T9	Account # 5083 Nelson M. Tessell 86 Hillmount Street Orillia, ON L3R 4U8	Account # 3460 R. M. Columbel 67 East Street Orillia, ON L3B 6Q2
11	Account # 50277 Betha MacMillian 496-8000 King Street Vancouver, BC V6X 6S1	Account # 3849 R. L. Smith-Jones 839 Fourth Avenue Edmonton, AB T9F 3S0	Account # 5083 Nelson M. Tessell 86 Hillmount Street Orillia, ON L3R 4U8
12	Account # 85394 Rodrigo de Guzman 589 Willowdale Road Calgary, AB T3C 2X0	Account # 1009 Louis St. Patrick 5893 Mammoth Path Richmond, BC V9S 3U2	Account # L. Joan Glassman 822 Rue del Mar Dorval, PQ H7S 3F9

HANDOUT A5-3 CLERICAL TEST

Read the directions carefully, and then work quickly and accurately. Try to answer as many questions as you can within the time limit.

Time Limit: 10 minutes

SECTION 1: Select the name that is exactly the same as the given name.

1. Brianne L. MacDonnell

- a. Brianne MacDonnell
- b. Briane L. MacDonnell
- c. Brianne L. MacDonnell
- d. Brianne L. MacDonnel

2. Harness Centre for Innovation

- a. Harness Centre for Innovation
- b. Harnes Center for Innovation
- c. Harness Center for Innovation
- d. Harness Center for Inovation

3. Centreville Plumbing Services Inc.

- a. Centerville Plumber Services Inc.
- b. Centerville Plumbing Service Inc.
- c. Centerville Plumbing Services Co.
- d. Centerville Plumbing Services Inc.

4. Debonier Gardens & Nursery

- a. Debonier Garden & Nursery
- b. Deboner Gardens & Nursery
- c. Debonier Gardens & Nursery
- d. Debonier Gardens and Nurseries

5. Madame LaCroix's Beauty Shoppe

- a. Madame LaCroix's Beauty Shop
- b. Madame LaCroix's Beauty Shoppe
- c. Madame LaCroix Beauty Shoppe
- d. Mademe Lacrois's Beauty Shoppe

6. Stefan Marcelli Sr. & Associates

- a. Stephan Marcelli Sr. & Associates
- b. Stefan Marcelli Sr. & Associates
- c. Stefan Marcelli Jr. & Associates
- d. Stefan Marcelli Sr. & Association

7. Winfield Musical Theatre

- a. Winfield Musical Theatre
- b. Winfield Musicale Theatre
- c. Winfeild Musical Theatre
- d. Winfield Musical Theater

8. Legault Industrial Design Ltd.

- a. Legault Industrial Designer Ltd.
- b. Legault Industrial Design Inc.
- c. Legault Industrial Design Ltd.
- d. Legoult Industrial Design Let.

9. Complete Insurance Brokers Co.

- a. Compete Insurance Brokers Co.
- b. Complete Insurance Breakers Co.
- c. Complete Insurance Brokers Inc.
- d. Complete Insurance Brokers Co

10. Electric Heating and Cooling, Inc.

- a. Eccentric Heating and Cooling, Inc.
- b. Electric Heating and Cooling, Inc.
- c. Electric Heat and Cooling, Inc.
- d. Electric Cooling and Heat, Inc.

HANDOUT A5-3 (CONTINUED)
CLERICAL TEST

SECTION 2: Select the number that is exactly the same as the given number.

- | | | |
|--|--|---|
| <p>1. 26196
a. 26916
b. 26196
c. 62197
d. 26996</p> | <p>4. 6696996
a. 6669996
b. 6696996
c. 6696696
d. 6996996</p> | <p>7. 8537169142051837
a. 8537619142501837
b. 8537169142051837
c. 8537169142501387
d. 8537169124501387</p> |
| <p>2. 853520
a. 805235
b. 853520
c. 850352
d. 853502</p> | <p>5. 275227152
a. 257227152
b. 275277152
c. 275227152
d. 275227512</p> | <p>8. 7727527775257322577522
a. 7727527755257322577522
b. 7727527775527322577522
c. 7725727775257732257522
d. 7727527775257322577522</p> |
| <p>3. 6331148
a. 8331148
b. 8311348
c. 8334119
d. 8113349</p> | <p>6. 789102978
a. 789210978
b. 789120978
c. 798102798
d. 789102978</p> | |

SECTION 3: Select the name that would come first if filed alphabetically.

- | | | |
|--|--|--|
| <p>1. a. William W. Mansen
b. Jason P. Mankin
c. Robyn B. Manning
d. Sarah L. Mannison</p> | <p>4. a. Stefanie C. Claxton
b. Stephanie B. Claxton
c. Phillip F. Claxton
d. Peter G. Claxton</p> | <p>7. a. Denis B. Bytown
b. Donald K. Bytown
c. Daniel J. Bytown
d. David A. Bytowne</p> |
| <p>2. a. Annie R. Kalen
b. Beatrice N. Kale
c. Christine P. Kadle
d. Darryl S. Kadle</p> | <p>5. a. Jane. D. Smithers
b. Marissa T. Smythers
c. Jane A. Smithers
d. Hendrik W. Smithey</p> | <p>8. a. Roberto F. Ciccarelli
b. Roger W. Ciccarello
c. Robert T. Ciccarelli
d. Romeo B. Ciccarello</p> |
| <p>3. a. Malcolm A. Hobarts
b. Martin J. Hobarts
c. Julia T. Hobarton
d. Alex A. Hobarts</p> | <p>6. a. Angela R. Peron
b. Victor Perone
c. Julia Peron
d. Adam C. Peron</p> | |

HANDOUT A5-3 (ANSWERS) CLERICAL TEST

SECTION 1

1. c
2. a
3. d
4. c
5. b
6. b
7. a
8. c
9. d
10. b

SECTION 2

1. b
2. b
3. a
4. b
5. c
6. d
7. b
8. d

SECTION 3

1. b
2. c
3. c
4. d
5. c
6. a
7. c
8. c

MODULE A6

OFFICE PROTOCOL AND BUSINESS ETIQUETTE

ESSENTIAL SKILLS

PRIMARY: WORKING WITH OTHERS

SECONDARY: DOCUMENT USE, ORAL COMMUNICATION,

GOAL

To learn about appropriate protocol and etiquette in a Canadian business environment

COURSE DESCRIPTION

Participants will learn strategies for organizing their work area and effective time management. Participants will also be introduced to good manners and common courtesies to be applied when working in a Canadian business environment. The ability to interact with others to complete tasks is an important essential skill for the workplace.

LESSON PLAN

Agenda	Topic	Resources
Introduction	Introduction <ul style="list-style-type: none">• Provide an overview of the module and discuss goals• Emphasize the importance of working with others as an essential skill for employment	Slides 1-3

Agenda	Topic	Resources
Organization Skills	<p>Organizing your Work Area</p> <ul style="list-style-type: none"> • Discuss steps for organizing a work area and review suggestions for maintaining an organized space • Emphasize the importance of eliminating unnecessary items <p>Dealing with Clutter</p> <ul style="list-style-type: none"> • Present one or more of the quotes about clutter and ask for participant feedback: Do they agree or disagree? Why or Why not? • Divide participants into small groups and ask them to discuss the following questions: <ul style="list-style-type: none"> • What causes clutter in their work? • How does clutter affect people in the workplace? • How much time do you waste because of clutter? • How do you manage it? <p>Discuss Guidelines for dealing with clutter</p> <p>Office Supplies Instruct participants to complete the exercise and discuss responses</p> <ul style="list-style-type: none"> • Review the list of common office supplies and clarify items that are unfamiliar • If possible, have some samples available and/or provide a sample catalogue <p>Exercise: Office Supplies Requisition</p> <ul style="list-style-type: none"> • Instruct participants to complete the exercise; discuss responses 	<p>Slides 4-9</p> <p>Slides 10-11 Handout A6-1</p> <p>Slides 12-16</p> <p>Handout A6-2</p>

Agenda	Topic	Resources
<p>Time Management</p>	<p>Planning and Scheduling</p> <ul style="list-style-type: none"> • Discuss what needs to be identified in order to effectively plan and schedule project-related tasks • Review tools that can assist in planning and scheduling • Note that effective planning and scheduling can provide you with a record of your achievements for performance reviews and discussions with management <p>Exercise: Dealing with Distracters</p> <ul style="list-style-type: none"> • Ask the participants to discuss their main sources of distractions • Instruct participants to complete the exercise; discuss responses <p>Exercise: Identifying Solutions</p> <ul style="list-style-type: none"> • Instruct participants to complete the exercise; discuss responses <p>Dealing with Overload and Deadlines</p> <ul style="list-style-type: none"> • In small groups ask participants to recall a time when they missed a deadline and discuss what they learned • Discuss guidelines for dealing with overload and deadlines <p>Overcoming Procrastination</p> <ul style="list-style-type: none"> • Instruct participants to reflect on the following questions: <ul style="list-style-type: none"> • What is one task that you procrastinate about doing? • What do you tell yourself to keep delaying? • What is your discomfort around doing this task? 	<p>Slides 17-23</p> <p>Handout A6-3</p> <p>Handout A6-4 Slide 25</p> <p>Slide 26-29</p> <p>Slide 30-34 Handout A6-5</p>

Agenda	Topic	Resources
Business Etiquette	<p>Interpersonal Skills</p> <ul style="list-style-type: none"> • Discuss the importance of effective interpersonal skills • Review skills that are particularly necessary in a business environment <p>Professional Behaviour in the Workplace</p> <ul style="list-style-type: none"> • Discuss general rules for professional behavior in the workplace <p>Body Language</p> <ul style="list-style-type: none"> • Discuss the ways that body language influences oral communication • Emphasize the importance of appropriate body language and discuss examples <p>Exercise: Body Language</p> <ul style="list-style-type: none"> • Instruct participants to complete the exercise; discuss responses <p>Exercise: Office Etiquette Quiz</p> <ul style="list-style-type: none"> • Instruct participants to complete the exercise; discuss responses 	<p>Slides 40-44</p> <p>Slides 45-50</p> <p>Slides 51-53</p> <p>Handout A6-7</p> <p>Handout A6-8</p>
Useful Business Terms	<ul style="list-style-type: none"> • Discuss the terms and explain how they are used in business 	<p>Slides 55-60</p>

HANDOUT A6-1 DEALING WITH CLUTTER

WHAT IS CLUTTER?

- Something in the wrong place
- Project waiting to be finished or filed
- Too many things in one area
- Things you don't use
- Materials from finished projects

GUIDELINES FOR DEALING WITH CLUTTER

- Observe your habits to see how you create clutter.
- Eliminate incoming items that contribute to clutter.
- Plan blocks of time to deal with your backlog of clutter.
- Group similar items of clutter together.
- Purge or discard items that you don't need or that have no value to you.
- Create a system to file, store or organize items you need or want to keep.
- Assign each item to its location.
- Maintain your organization and adapt as you need to over time.

SOME THOUGHTS ON CLUTTER

A place for everything, and everything in its place.

HANDOUT A6-2 OFFICE SUPPLIES REQUISITION

Using today's date, fill out the form below using the following details. Kendra Nelson order supplies for the Mail Department. The cost centre is 85321 and the routing code is D17. Her extension is 554. Use the following stock numbers to order your supplies, and then on a separate piece of paper make a list of these numbers and the corresponding description. Exchange the list with the person next to you to make sure you have ordered everything you need, and have the person next to you proofread your list.

SUPPLIES NEEDED:

Stock #	162	164	163	156	063	175	194	196	117	082	138
Quantity	4	1	2	8	12	1	1	1	2	1	1

OFFICE SUPPLIES REQUISITION							
Submit Request to Warehouse						Date: _____	
Cost Centre		Routing Code		Employee Name		Extension	
KEY: EA=Each, PK=Pack, BX=Box, DZ=Dozen, RL=Roll, TU=Tube, ST=Set, PD=Pad							
Qty	Stock #	Unit	Description	Qty	Stock #	Unit	Description
DESK SUPPLIES				WRITING SUPPLIES			
	082	BX	Staples, 2000/box		155	EA	Blue Hi-Lighter
	094	BX	Paper Clips, Large		156	EA	Yellow Hi-Lighter
	095	BX	Paper Clips, Small		161	EA	Marker, Red
	096	BX	Binder Clips, Large		162	EA	Marker, Black
	097	RL	Binder Clips, Small		163	DZ	Medium Tip Pen, Blue
	103	RL	Scotch Tape		164	DZ	Medium Tip Pen, Red
	104	RL	Masking Tape		165	DZ	Medium Tip Pen, Black
	105	RL	Double-Sided Tape		169	PK	Dry erase Markers, Asst.
	116	BX	Blue Sticky Notes		174	EA	Eraser
	117	BX	Yellow Sticky Notes		175	PK	#2 Pencil
	118	BX	Pink Sticky Notes		176	EA	Mechanical Pencil, .5mm
	124	BX	Rubber Bands		177	TU	Pencil Lead, .5mm
FILING SUPPLIES				MISCELLANEOUS SUPPLIES			
	136	BX	Hanging Folder		058	EA	3-ring binder, 2"
	137	BX	File Folder, Letter		063	EA	Report Cover
	138	BX	File Folder, Legal		194	EA	Date Stamp
	142	BX	Folder Labels, White		195	EA	Stamp Pad, Black
	143	BX	Folder Labels, Colour		196	EA	Stamp Pad, Red

HANDOUT A6-4 IDENTIFYING SOLUTIONS

1. What are your main sources of distraction?
2. Are they internal or external?
3. What *secret* enjoyment do you get from distracting yourself?
4. What do you enjoy about others distracting you?
5. Choose three distracters and identify possible solutions.
6. Also indicate when you will implement your solution and when you will review your progress.

Distracter	Solutions	Start Date	Review Date
1.			
2.			
3.			

HANDOUT A6-5 OVERCOMING PROCRASTINATION

SOME CAUSES OF PROCRASTINATION

- Lack of confidence
- Value of the task
- Deadline distance
- Sensitivity to delay
- Others
 - Analysis paralysis
 - Perfectionism
 - Confusion about how to begin
 - Underestimating or time needed
 - Overestimating time available

DEALING WITH PROCRASTINATION

- Recognize that you do procrastinate.
- Decide that you want to change your habit.
- Own the project or task.
- Establish a deadline for completion.
- Break a project down into smaller, do-able tasks and set short-term target dates.
- Do it as soon as possible.
- Set aside a small period of time, such as 15 minutes to get started.
- Make a list of the benefits of completing your work.
- Ask questions to get all the information you need to start a task.
- Provide regular updates of work to the person who assigned the work.
- Use reminders.
- Expect some delays due to fatigue, unexpected requests, other interruptions.
- Reward yourself when you have completed the task.
- Log your time on routine tasks to better estimate time available for priority work.
- Reframe any negative or stressful thoughts you may have about the task.

HANDOUT A6-7 BODY LANGUAGE

In small groups, take turns to role play the body language action listed in the left column of the table below. Record what you think the action communicates in the right column of the table.

Action	Communication
Crossed arms and legs	
Tilted head	
Yawn	
Raising eyebrows	
Pinching bridge of nose	
Staring off into the distance	
Drumming fingers	
Restless leg and foot movements	
Stroking chin	
Looking down	
Doodling	

HANDOUT A6-8 OFFICE ETIQUETTE QUIZ⁵

Take a few moments to think about each question, and then write down an appropriate response.

1. **You are sitting at your desk, in full view of other office workers. You did not get a chance to eat breakfast this morning. What would you do?**

2. **Your boss has given you an assignment to do on the computer, and it is due in one hour. You have almost finished, but you are not sure about one part of it. Your boss is in a meeting. What steps would you take to solve your problem?**

3. **You are at the reception desk. You are not busy, and a co-worker tells you to read a book. Would you? Why or why not?**

4. **You notice a co-worker chewing gum. You start to chew gum too. Your supervisor tells you it is not acceptable. How would you respond?**

5. **A co-worker swears a lot, and it makes you uncomfortable. What would you do?**

⁵ Source: YWCA Toronto. "Office Etiquette Quiz" in *Discovering Life Skills Volume 7: Teaching Employment Groups*, 2nd Edition. Toronto: YWCA Toronto, 2006, p. 295.

MODULE A7

ORGANIZING MEETINGS

ESSENTIAL SKILLS

PRIMARY: WORKING WITH OTHERS

SECONDARY: WRITING, ORAL COMMUNICATION,

GOAL

To learn how to prepare for business meetings

COURSE DESCRIPTION

Participants will learn how to organize a variety of different types of meetings, ranging from small, informal meetings to large conferences. Participants will also be introduced to tips for making basic travel arrangements. The ability to interact with others to complete tasks is an essential skill for the workplace.

LESSON PLAN

Agenda	Topic	Resources
Introduction	Introduction <ul style="list-style-type: none">• Provide an overview of the module and discuss goals• Emphasize the importance of working with others as an essential skill for employment	Slides 1-4
Planning a Meeting	Pre-Meeting Planning <ul style="list-style-type: none">• Emphasize that good planning is very important to ensure a successful meeting• Discuss tasks that need to be completed before a meeting takes place Choosing a Location <ul style="list-style-type: none">• Discuss tips for choosing a location	Slides 5-8 Slide 9 Slide 10

Agenda	Topic	Resources
Planning a Meeting	<p>Exercise: Meeting Room Reservation Request</p> <ul style="list-style-type: none"> Instruct participants to complete the exercise; discuss responses Choosing an Offsite Location <p>Inviting and Notifying Attendees</p> <ul style="list-style-type: none"> Review information that should be included in a meeting notice Discuss sample meeting notices Note that some offices use electronic calendars to schedule meetings Emphasize the importance of asking people to respond even if they are not attending; this is essential in order to plan appropriately <p>Exercise: Formal Notice of Meeting</p> <ul style="list-style-type: none"> Instruct participants to complete the exercise; discuss responses 	<p>Slide 11 Handout A7-1</p> <p>Slides 12-14</p> <p>Slide 15-19</p> <p>Slide 20 Handout A7-2</p>
Facilitating a Meeting	<p>Preparing an Agenda</p> <ul style="list-style-type: none"> Discuss the importance of preparing an agenda Review sample agendas <p>Chairing a Meeting</p> <ul style="list-style-type: none"> Discuss tips for chairing both formal and informal meetings Explain and briefly review Robert's Rules of Order (a set of guidelines containing rules of order commonly used in meetings) <p>Minutes</p> <ul style="list-style-type: none"> Discuss tips for effective note taking Emphasize the importance of taking accurate minutes 	<p>Slide 21-23</p> <p>Slides 24-25</p> <p>Slides 26-28</p> <p>Slides 29-32</p>

Agenda	Topic	Resources
Facilitating a Meeting	<p>Exercise: Meeting Log</p> <ul style="list-style-type: none"> Instruct participants to complete the exercise; discuss responses <p>Electronic Conferencing</p> <ul style="list-style-type: none"> Note the increasing popularity of electronic conferencing in the workplace Discuss various tools for electronic conferencing <p>Key Terms</p> <ul style="list-style-type: none"> Review common terminology associated with organizing meetings 	<p>Slide 33 Handout A7-3 Slide 34</p> <p>Slides 35-36</p> <p>Slides 37-40</p>
Travel Arrangements	<p>Travel Arrangements</p> <ul style="list-style-type: none"> Discuss tips for making travel arrangements Define itinerary and review the sample travel itinerary Review steps for making hotel and car rental reservations Note that these are general guidelines; participants should check their company travel policy for specific details <p>Exercise: Travel Advance</p> <ul style="list-style-type: none"> Instruct participants to complete the exercise; discuss responses <p>Exercise: Travel Expense Claim</p> <ul style="list-style-type: none"> Instruct participants to complete the exercise; discuss responses 	<p>Slides 41-45</p> <p>Slides 46-48</p> <p>Slide 49 Handout A7-4</p> <p>Handout A7-5</p>

HANDOUT A7-1 MEETING ROOM RESERVATION REQUEST

You have been asked to reserve the main conference room for your department (Human Resources). The meeting will be held on December 6 from 9:30 a.m. until 11:00 a.m. There will be 10 people attending. You require a single table set-up. You also require a flip chart and a projector. You would like to have coffee, tea and bagels delivered to the room at 9:15 a.m. Use your own name. Your extension is 292. "Today's date" should be at least one week before the date of the meeting.

MEETING ROOM RESERVATION

Requested by: _____ Date: _____

Department: _____

Date of Meeting: _____ Time of Meeting: _____

Location: _____ Number of People Attending: _____

Setup Style (check one):

- | | | |
|----------------------------------|---------------------------------------|---------------------------------------|
| <input type="checkbox"/> Board | <input type="checkbox"/> T-Shaped | <input type="checkbox"/> U-Shaped |
| <input type="checkbox"/> Theatre | <input type="checkbox"/> Single Table | <input type="checkbox"/> Double Table |

Materials Needed:

- | | | |
|---------------------------------|--------------------------------------|------------------------------------|
| <input type="checkbox"/> None | <input type="checkbox"/> Screen | <input type="checkbox"/> Projector |
| <input type="checkbox"/> Laptop | <input type="checkbox"/> White Board | <input type="checkbox"/> Other |

Cafeteria Service (check one):

- | | |
|---|---|
| <input type="checkbox"/> Has been requested | <input type="checkbox"/> Has not been requested |
|---|---|

Special Instructions:

**HANDOUT A7-2
FORMAL NOTICE OF MEETING**

You work for a company called HR Staffing Solutions Inc. Your office is located at 682 Fisher Street in Toronto, postal code M9S 4K2. The office telephone number is 416-555-8934. Your manager, Bess Hargrove, has asked you to reply to this meeting notice on her behalf. She is a member of the Association, and she would like a vegetarian meal. Her home telephone number is 647-555-8876.

**CANADIAN ASSOCIATION OF HUMAN RESOURCES ADMINISTRATORS
NOTICE OF DINNER MEETING**

Wednesday, October 6, 2010
Muskoka Inn
Lakeview Room
876 Forest Lane
Huntsville, ON K0L 3J9

**Guest Speaker: Allison Cresmore
President, HR Innovation Ltd.**

17:30	Networking Reception
18:00	Annual General Meeting President's Report: Kevin Anderson Treasurer's Report: Suzanne Percey Membership Report: Peter Somers Policy Committee Report: Stefan Rocher
19:00	Dinner
20:00	Guest Speaker: Allison Cresmore

TO REGISTER: Complete and return this portion, along with your cheque payable to CAHRA, to Marilyn Lane, 4567 Bay Street, Suite 2700 Toronto, ON, M3K 0Z8.

Name: _____

Company: _____

Address: _____

Postal Code: _____ Tel (Bus): _____ Tel (Home): _____

Enclosed is my cheque for: \$180 (members) \$250 (non-members)
Special Meal Requirements: Vegetarian _____ Non-Dairy: _____
 Diabetic _____ Other (specify): _____

HANDOUT A7-3 MEETING LOG

You are responsible for recording minutes at the monthly Customer Service team meeting being held at 9:30 a.m. in room B017 on August 5, 2010. Three important issues were discussed. First, Brenda raised the issue of an increased number of customer service complaints due to billing errors. Attendees discussed installing computer software that can track invoices and recognize billing errors. Peter will set up a meeting with the IT department to identify potential software solutions. Second, Charles raised the issue of ongoing customer dissatisfaction due to lengthy wait times. Attendees discussed hiring more staff and installing a voice messaging system where callers can leave messages and have their call returned when a representative is available. Kevin will meet with the company president to determine whether or there is room in the budget to implement this. Finally, Samantha raised the issue of motivating customer service representatives to provide better service. Attendees discussed recognizing an Employee of the Month to reward customer service representatives who are particularly good at their job. Tony will create a certificate template. The Employee of the Month recognition program will start in September.

MEETING LOG	
Team:	Location:
Date:	Time:
PROBLEM/ISSUE DISCUSSED	RECORD OF DISCUSSION
Topic:	Discussion:
Follow Up:	Recommendation(s):
Topic:	Discussion:
Follow Up:	Recommendation(s):
Topic:	Discussion:
Follow Up:	Recommendation(s):

HANDOUT A7-4 TRAVEL ADVANCE

Your manager, Benjamin McInnis, is travelling to Montreal on May 18, 2010 to meet with a potential participant. He will be returning on May 20. He is requesting \$400 for accommodation, \$200 for meals and \$100 for transportation, and he would like to receive a company cheque. Fill out the form below on his behalf. It must be submitted at least two weeks before the departure date.

**MILLENNIUM SALES INC.
5602 BLOOR STREET WEST
TORONTO, ON M4D 9L2**

TRAVEL FUND ADVANCE

** Please forward the completed form to the Accounting Department.

Name of Employee Requesting Advance: _____

Date of Request: _____

Destination: _____

Departure Date: _____

Return Date: _____

Advance Required:

Accommodation \$ _____

Meals \$ _____

Transportation \$ _____

TOTAL REQUESTED \$ _____

Preferred Method of Payment: _____ Company Cheque _____ Traveller's Cheque

For Accounting Department use only:

Authorization: Date:

HANDOUT A7-5 TRAVEL EXPENSE CLAIM

You are a Sales Manager, and you have recently returned from a business trip to Vancouver. You arrived in Vancouver on July 15 and spent \$55 on a taxi to your hotel and \$70 on lunch with the Vancouver team leader. On July 16 you spent \$225 on dinner with two participants. On July 17 you took a taxi to the airport, which cost another \$55. When you arrived in Toronto, you picked up your car and had to pay \$45 for 3 days of parking. You stayed at a hotel on July 15 and 16, and paid \$98 per night for your room. Fill in the form below using your name and today's date. Your employee number is 5489335.

TRAVEL EXPENSE CLAIM							
Name: _____				Title: _____			
Employee #: _____				Date: _____			
Date	Location	Transport.	Hotel	Meals	Other	Total	Comments
Expense Totals							
Certification of Expenses							
I certify that that I have incurred the expenses noted above.							
_____				_____			
Employee name				Date			
Approval							
_____		_____			_____		
Name		Title / Department			Date		

MODULE A8

EMPLOYER EXPECTATIONS

ESSENTIAL SKILLS

PRIMARY: WORKING WITH OTHERS

SECONDARY: ORAL COMMUNICATION, CONTINUOUS LEARNING

GOAL

To learn about what many employers generally expect from their employees.

COURSE DESCRIPTION

Participants will gain an understanding and appreciation of employer expectations. The ability to work with others to complete tasks is an important essential skill for the workplace.

LESSON PLAN

Agenda	Topic	Resources
Introduction	<p>Explain the meaning of the term Workplace Culture</p> <ul style="list-style-type: none"> • Gather critical information about your company. • Begin with the basics, such as your company's history, products and vision. Go to their website and look at the mission statement, goals, values and the corporate image. • Keep in mind that every workplace has its own culture, accepted practices and unwritten rules and it is your responsibility to adapt and to learn. 	Slides 1-4
<p>Employer's/ Employee's Expectations</p> <p>Supervisors</p>	<ul style="list-style-type: none"> • Break the group into two. • One group makes a list of the expectations of an employer from an employee the other group makes a list of employee's expectations of the employer. • Have the groups flipchart their discussions. • Make sure employee's expectations are realistic • Discuss the supervisor's/employee's relationship 	<p>Slide 5 Flip Chart Paper</p> <p>Slides 6-7</p>

Agenda	Topic	Resources
Employer's Expectations	<ul style="list-style-type: none"> • Explain the importance of meeting and exceeding employer's expectations. If group has already come up with these points, just review them, if not elaborate. • Go through each of the employer's expectations and give examples wherever appropriate. • Good Communication Skills • Reliable • Good work ethics • Ability to do the job • Team work • Ability to work independently • Positive Attitude • Appearance • Adaptability • Resilient – don't give up • Complementary to the team • Contribute • Respectful • Inclusive 	Slides 8-12
Why Do People Get Fired?	<ul style="list-style-type: none"> • Pose the question to the class: “ Why do people get fired from their jobs?” Flipchart their answers • Remind the class that persons may not lose their jobs because they don't have the required skills and knowledge, but because they don't know how to work well on a team and how to problem solve effectively. 	Slides 13-14 Flipchart

Agenda	Topic	Resources
How To Keep Your Job	<p>Discuss each of the points</p> <ul style="list-style-type: none"> • Understand Job Description • Explain that their performance will be measured based on how successful they meet and perform their job duties. If a company does not provide a job description they can speak with the supervisor and prepare one together. • Develop good problem solving skills • Bring ideas and solutions • Be proactive • Continue to update your skills • Avoid conducting personal business on the company's time • Be organized • Keep your supervisor informed • Ask for feedback • Set and achieve goals • Meet deadlines • Consider longer term impact • Work within parameters, budgets • No blame attitude • Ownership and accountability 	Slides 15-20
	Give handout and go through the extra points with group	Handout A8-1

Agenda	Topic	Resources
Case Study	<p>Distribute copies of the case study to the class. Let them first go through it individually.</p> <ul style="list-style-type: none"> • Break the large group into smaller groups of 3-4 members and ask them to discuss their views and probable solutions. • Have the groups flipchart their discussions and bring back to the large group. • Clarify any doubts or questions raised by the group. • Refer back to the points on How to Keep Your Job • Other answers to solve the problem: clarify what your expectations are as to what needs to be done on a daily basis. • Tell your boss in advance if you may not meet your deadlines and suggest solutions • Answers looking for: <ul style="list-style-type: none"> o Clarify the priorities of your job with your supervisor o Check in regularly with any questions o Do not assume co-workers' performance are accurate o Let your supervisor know in advance if you are at risk of missing any deadline o Ask for assistance if required 	Slide 21 Handout A8-2 (case study) Flipchart
Your First Day On The Job	<ul style="list-style-type: none"> • Introduce the topic by emphasizing how preparing in advance can really ease the stress of your first day on the job. <p>Discuss each of the points</p> <ul style="list-style-type: none"> • Be on time or even early • Dress professionally • Come prepared • Know the route • Know where to report • Meet your supervisor • Get to know your co-workers • Ask questions • Learning during the first few weeks • Listen and take notes for future reference 	Slides 22-27
	Give handout and discuss the points with the class.	Handout A8-3

Agenda	Topic	Resources
Your First Week on the Job	<ul style="list-style-type: none"> • Explain to the class that even though the first couple of weeks on the job are bound to be hectic ones, this is the time when you will be making an impression on your manager and co-workers. <p>Go through each of the points and discuss the same with the class.</p> <ul style="list-style-type: none"> • Smile • Ask questions • Make notes as you go along • Define your boundaries • Listen and learn • Show appreciation • Be open to constructive criticism • Complete your work accurately and on time • Demonstrate eagerness to learn • Understand priorities • Show flexibility • Stay upbeat and positive 	Slides 29-33
	<ul style="list-style-type: none"> • Other points to consider – give handout and go through with class 	Handout A8-4
Office Etiquette	<ul style="list-style-type: none"> • Split into groups of two. Have them review the situations given to them by the instructor. • See if they can solve the problem situation <p><u>Outcome expected</u> Answers looking for:</p> <ul style="list-style-type: none"> • Understand your job priorities and deadlines • Clarify with your supervisor not your co-worker • Be proactive and arrive earlier • Keep your duties professional you are being paid to work not to read a book. If you have no other work ask your supervisor if anyone else needs help 	Slide 34 Handout A8-5
At Work – Do’s and Don’ts	<ul style="list-style-type: none"> • Give handout and review the points with the class. Many of the points have been covered so this is an overview/review. 	Slides 35 - 37 Handout A8-6

HANDOUT A8-1

WHAT YOU NEED TO DO TO KEEP YOUR JOB⁶

On the job behaviour is critical in determining success in the workplace. The following points outline some examples of positive workplace behaviour.

- Be punctual - arrive at work on time and back from lunch on time.
- Learn to accept criticism and direction graciously.
- Control your emotions - an angry outburst may cost you your job.
- Discuss problems with supervisors, not everyone else on staff.
- Encourage feedback and advice and use it to do your job better.
- Have a positive attitude and sense of humour.
- Listen!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!
- Volunteer to help others.
- Own up to your mistakes. Be honest with your co-workers.
- Question anything you don't understand. Confirm your understanding.
- Take only scheduled breaks and lunches.
- Control your social life - don't have friends or family phoning or visiting you at work during work hours.
- Keep lines of communication open with your supervisor.
- Give your new job your best effort and do the best work you can.
- Know your limitations and be honest about what you can do.
- Don't bring your personal problems to work.
- Adopt a 'no surprise' attitude

⁶ Source: Prevocational Experience Program. "What You Need to Do to Keep Your Job" in Discovering Life Skills Volume 7: Teaching Employment Groups, 2nd Edition. Toronto: YWCA Toronto, 2006, p. 299.

HANDOUT A8-2

CASE STUDY: THE CASE OF THE MISSING DOCUMENT

It has been two weeks since you joined ABY Corporations. Your supervisor Mr. Sanderson has been very patient with you while you get used to the new workplace.

In your previous company, you used to sort and file correspondence on a regular basis. However at this new job, you find that your co-workers and supervisor do not seem to be giving filing all that much importance. Everywhere you look you see mountains of papers and files.

Mr. Sanderson has also mentioned that there are a couple of crucial deadlines that you and the team have to meet by the end of this month.

At the beginning of every day you decide that you must sort out the papers on your desk, but then get sidetracked due to a number of telephone calls and queries that also need to be completed.

As a result, you start to allow things to slide, and let correspondence and papers pile up into a huge heap.

One Monday morning, Mr. Sanderson calls you and mentions that the President of the Company urgently requires a certain document to be faxed to the participant.

You remember that Mr. Sanderson had handed over this document to you to work on, but now find yourself searching for it.

What can you do to solve this problem? How will you try to avoid something like this being repeated in the future?

HANDOUT A8-3 YOUR FIRST DAY ON THE JOB⁷

“YOU NEVER GET A SECOND CHANCE TO MAKE A FIRST IMPRESSION.”

Review this list at least one full day before you start a new job.

- Prepare lunch to eat at some time during the day. Know if there are vending machines where you will be working.
- Know how to get to work. Know where the parking lot is and if you will need exact change or a special pass to enter it. Find the closest bus and/or subway to where you will be working. Leave home earlier than you need to.
- Arrive five to ten minutes early.
- Be dressed appropriately for work. Also have with you any protective gear you may need to do your work. This could include boots, a helmet, goggles, etc. If in doubt, inquire what attire is appropriate and or required.
- Do not bring personal belongings with you on your first day. You may be asked to bring in a coffee mug-that’s okay. Everything else can wait until later.
- Make sure you know when break, lunch and finishing times are. Ask where you can eat lunch and snacks. Locate the washroom. When you take a break, make sure you know how long you are allowed to take and make sure you always return on time or a bit early.
- Ask all questions you need and if necessary take notes. Your notes may also include important names and instructions.
- Do more listening than talking and try to keep a pleasant and interested look on your face.
- Do not talk at length about your personal life. Only talk about something that already is on your resume. It is not yet time to talk about your family situation, etc.
- Try to be polite.
- At the end of the day, say “goodbye” when you leave. And if it feels right, add “I’ll see you tomorrow!”

⁷ Source: Galet, Lisa. “Your First Day on the Job” in *Discovering Life Skills Volume 7: Teaching Employment Groups*, 2nd Edition. Toronto: YWCA Toronto, 2006, p. 296.

HANDOUT A8-4 FIRST WEEK ON THE JOB⁸

The first week on the job can be very challenging. You will be trying to remember a lot of information about your new workplace, the job you were hired to do, the names of colleagues. Creating first impressions and beginning work relationships with your co-workers and supervisors is critical.

The following is a list of things that you will likely need to know/ want to know during your first week on the job:

- Job instructions and expectations
- Names of co-workers
- Who your direct supervisor will be
- Others you need to know
- Location of washrooms and lunch rooms
- How to operate any equipment that you will be using: photocopier, computer, fax, scanner etc.
- Pay information: what days you get paid on, how often you get paid, is your pay deposited directly into your account or are you given a cheque, do you need to fill out any forms for payroll purposes?
- Is there an orientation session?
- Where office supplies are located: pens, writing pad, paper for the photocopier, letterhead, envelopes, time sheets etc.
- Internet phone list
- Company's policies on health and safety, workplace harassment, workplace violence prevention, timesheets, lateness, illness, etc.
- Procedures to be followed in case of fire

⁸ Source: Prevocational Experience Program. "First Week on the Job" in Discovering Life Skills Volume 7: Teaching Employment Groups, 2nd Edition. Toronto: YWCA Toronto, 2006, p. 297.

HANDOUT A8-5 OFFICE ETIQUETTE QUIZ⁹

Your name: _____ Today's date: _____

Please take a few moments, first to think, then to write appropriate responses to the following questions:

- 1. You are sitting at your desk, in full view of other office workers. You did not get a chance to eat breakfast this morning. What will you do?**

- 2. Your boss has given you an assignment to do on the computer, and it is due in one hour. You have almost finished but, you are not sure about one part of it. Your boss is in a meeting. Describe the steps you would take and how would you solve this problem:**

- 3. You are on reception, you are not busy and a co-worker tells you to read a book. Would you? Please give your reasons:**

- 4. You notice a co-worker chewing gum. You start chewing gum too. Your supervisor says it is not acceptable. How would you respond?**

- 5. A co-worker swears a lot. It makes you uncomfortable. What would you do?**

⁹ Source: YWCA Toronto. "Office Etiquette Quiz" in Discovering Life Skills Volume 7: Teaching Employment Groups, 2nd Edition. Toronto: YWCA Toronto, 2006, p. 295.

HANDOUT A8-6

AT WORK - DO'S

Dos

- Ask for feedback
- Be proactive
- Go above and beyond the call of duty
- Keep lines of communication open between you and your supervisor
- Take responsibility
- Problem solve
- Continue to develop yourself

AT WORK - DON'TS

The Basics:

- Swearing is unacceptable in business. So is crying, shouting or other loss of temper.
- Don't stand around and visit and chat when you are not busy. And don't sit around and read a magazine or indulge in personal business. Get busy or ask if anyone else needs any assistance.
- Don't entertain your family or friends at the office. Don't conduct personal business during work hours.
- Don't interrupt when someone else is talking or hover around outside their door. Just because you need some information doesn't give you the right to interrupt others. Call, make an appointment or come back at another time.
- Don't borrow money, company equipment or supplies from work.
- Don't be complaining about your personal problems around the office. Keep personal remarks private or behind closed doors.
- Don't use nicknames in business. It is considered unprofessional and informal.
- Keep personal office décor to a minimum and not offensive, check company policy.
- Don't gossip.

OTHER DON'TS

Do not conduct any personal hygiene practices in the office:

- Any teeth cleaning or picking should be done in the washroom not in public.
- Don't chew gum.
- Don't pick at your face and hair.
- Don't put makeup on at your desk.
- Don't eat food at your desk or workstation.
- Don't sit on anyone's desk.
- Don't put your feet up on any desks, chairs or table tops.
- You must abide by city by-laws.
- Don't dress for the beach, nightclub, fitness club, cottage, camping, etc.
- Don't have personal conversations during business hours. If you must take a personal call, arrange for privacy and only gather needed information that can be obtained quickly.

MODULE A9

CULTURAL DIVERSITY

ESSENTIAL SKILLS

PRIMARY: WORKING WITH OTHERS

SECONDARY: THINKING, ORAL COMMUNICATION

Note: This is not a lesson plan, but an overview of the Module. If you would like to include this Module in your curriculum, please contact us for more information

GOAL

To learn how to communicate with people from diverse cultural backgrounds in the workplace

DESCRIPTION

Cultural diversity exists within the workplace in Canada. All Canadians, especially newcomers, should be familiar with Canadian workplace culture and customs in order to obtain and maintain employment. As an employee, you may encounter people from a variety of backgrounds with values that are different from yours. Being aware, understanding and tolerant of cultural differences will help to enable your success in the workplace.

At YWCA Toronto, we offer a variety of workshops about cultural diversity in Canada. These workshops are available in the Discovering Life Skills manuals. Some of the workshops we offer are listed below.

- **Becoming Culturally Aware in the Workplace**
Topics covered include: Canadian workplace culture, cultural diversity of co-workers respecting cultural diversity
- **Cross Cultural Communication**
Topics covered include: Sensitivity and knowledge necessary for cross-cultural communication, and ways to enhance cross-cultural communication
- **Awareness for New Canadians**
Topics covered include: a variety of tips for newcomers, common challenges that new Canadians face

In addition, you can visit the following websites for more information about cultural diversity in Canada:

- **Canadian Human Rights Commission**
<http://www.chrc.ccdp.ca>
- **Settlement.Org**
<http://www.settlement.org>
- **Service Ontario**
www.serviceontario.ca
- **Statistics Canada**
www.statcan.gc.ca

MODULE A10

FINANCIAL LITERACY

ESSENTIAL SKILLS

PRIMARY: NUMERACY, THINKING SKILLS

SECONDARY: DOCUMENT USE, CONTINUOUS LEARNING

Note: This is not a lesson plan, but an overview of the Module. If you would like to include this Module in your curriculum, please contact us for more information

GOAL

To learn about how to make informed financial decisions

COURSE DESCRIPTION:

The SEDI Financial Literacy Series is comprised of a modular approach, with 9 'stand alone' modules on distinct, but inter-related topics. Financial literacy enables individuals to make smart, informed financial decisions. Using numbers and thinking in quantitative terms to complete tasks is an essential skill for the workplace.

The sessions are created in a way that allow participants to self-assess their skills knowledge and confidence in a range of financial matters at the start of Module 1, and at the end of Module 9. The topics covered in the Modules are listed below.

Exploring our relationship with finances
Budgeting – Developing a money action plan
Saving
Banking
The Educated Consumer
Credit and Credit Cards
Debt and Financial Woes
Exploring Credit Bureaus, Ratings, Scores and Reports
Investing Basics

MODULE A11

EFFECTIVE EMAILING

ESSENTIAL SKILLS

PRIMARY: COMPUTER USE

SECONDARY: DOCUMENT USE, WRITING,

GOAL

To learn how to send effective email messages

COURSE DESCRIPTION

Participants will learn techniques and strategies for managing email effectively, and appropriate email etiquette. The ability to use computers and other forms of technology is an essential skill for the workplace.

LESSON PLAN

Agenda	Topic	Resources										
Introduction	<p>Learning Objectives</p> <ul style="list-style-type: none"> • Provide an overview of the module and discuss the goals • Discuss the importance of effective emailing as part of an essential skill for the workplace 	Slide 2-3										
Warm-up	<p>Warm up: E-Trivia</p> <p>Instruct participants to answer the questions. Review the correct answers:</p> <table> <tr> <td>1. c</td> <td>6. b</td> </tr> <tr> <td>2. a</td> <td>7. b</td> </tr> <tr> <td>3. b</td> <td>8. c</td> </tr> <tr> <td>4. d</td> <td>9. a</td> </tr> <tr> <td>5. a</td> <td>10. d</td> </tr> </table> <p>Debrief in large group.</p> <p>Exercise: When to Use Email</p> <ul style="list-style-type: none"> • Instruct participants to complete • Discuss where they thought either answer might work. • Review Key Criteria for Choosing Email. 	1. c	6. b	2. a	7. b	3. b	8. c	4. d	9. a	5. a	10. d	Slide 4 Handout A11-1
1. c	6. b											
2. a	7. b											
3. b	8. c											
4. d	9. a											
5. a	10. d											
		Slide 5 Handout A11-2 Slide 6										

Agenda	Topic	Resources
Guidelines	<p>Using Your Software</p> <ul style="list-style-type: none"> • Ask participants to name a feature of their software that they find very useful or use frequently. Give a few examples, like folders, the search tool, etc. • Review Guidelines for any suggestions that were not mentioned in the list from the participants. 	<p>Flip chart</p> <p>Slide 7-9</p>
Handling Incoming Messages	<p>Handling Incoming Messages Introduction</p> <p>Give participants the quote from Communicare:</p> <ul style="list-style-type: none"> • 28% of employees say they “often” miss key information • 63% miss key information “once in a while” <p>Exercise:</p> <ul style="list-style-type: none"> • In small groups ask them to discuss an experience on missing information <p>Case: You are returning to your office after a two week vacation and expect to have the usual glut of emails.</p> <ul style="list-style-type: none"> • In pairs ask participants to answer: • What suggestions can you think of for handling these to get through them as quickly as possible? • Debrief in the large group. • Review the handout on Handling Incoming Messages for any that were not covered in the participant debrief. 	<p>Slide 10</p> <p>Use flip chart</p> <p>Slide 11</p> <p>Handout A11-3</p>

Agenda	Topic	Resources
Managing Your Inbox	<p>Managing Your Inbox</p> <ul style="list-style-type: none"> • Ask participants what they find stressful about email? • In the discussion, mention the stress created from messages sitting in the inbox. • Did you know <p>Exercise: Questions</p> <ul style="list-style-type: none"> • Write each of the following questions, one question per sheet of paper. <ul style="list-style-type: none"> o How often do you check your inbox? o How often do you empty your inbox? o How often do you sort and delete your files, including your sent box? o What is the frequency with which your software sends and receives email? o What are the advantages to the alert feature? Disadvantages? o Do you respond to emails as they arrive or decide when you are going to respond according to your priorities? o Hand out one sheet per small group for them to discuss. o Debrief each question in the large group. Review any of the points from Guidelines that were not brought out in the discussion. 	<p>Slide 12 Flip chart</p> <p>Slide 13-14</p> <p>Slides 15-16</p> <p>Handout A11-4</p>

Agenda	Topic	Resources
<p>Email Etiquette</p>	<p>Email Etiquette</p> <ul style="list-style-type: none"> • In small groups ask participants to develop a list of pet peeves about email. • Ask a spokesperson to do a recap for the large group. • Debrief on themes. <p>Exercise: Guidelines</p> <ul style="list-style-type: none"> • Divide the group and assign each group <ul style="list-style-type: none"> When Sending When Replying. • Ask them to review and identify any of the tips they do not practice now but would find useful. • Ask each group to review <ul style="list-style-type: none"> For Absences For Ping-Ponging Distribution Lists. <p>Debrief in a large group.</p>	<p>Slide 17</p> <p>Handout A11-5 Slide 18</p> <p>Slide 19</p>
<p>Creating Subject Lines</p> <p>Practice</p>	<p>Creating Subject Lines</p> <ul style="list-style-type: none"> • Give participants several examples of subject lines and ask them if they are clear and interesting, motivating them to read the message. • Discuss what could be done to improve these examples. • Review Guidelines. • Review Examples of Subject Lines. <p>Exercise: Practice</p> <ul style="list-style-type: none"> • Ask participants to do the practice in the handout • Ask for volunteers to review their improvements of each and debrief in the large group. 	<p>Slide 20</p> <p>Handout A11-6</p> <p>Slide 21-23</p>

HANDOUT A11-1 E-TRIVIA

1. **How many emails are considered both realistic and manageable to receive per day?**
 - a. 64
 - b. 15
 - c. 25
 - d. 48

2. **How long does it take us to handle 25 incoming messages?**
 - a. 2 hours
 - b. 1 hour
 - c. 3 hours
 - d. 30 minutes

3. **What is the daily average of emails received in the workplace?**
 - a. 98
 - b. 48
 - c. 73
 - d. 112

4. **What % of email requires a response?**
 - a. none
 - b. 90%
 - c. 45%
 - d. 65%

5. **How much time do we spend on average on each email that we receive?**
 - a. 5 minutes
 - b. 10 minutes
 - c. 2 minutes
 - d. 7 minutes

6. **How long do we spend on average on “low relevance” emails that we consider and delete?**
 - a. 1 minute
 - b. 30 seconds
 - c. 10 seconds
 - d. 45 seconds

7. How many emails do we send each day on average?

- a. 38
- b. 26
- c. 53
- d. 71

8. If we receive 50 emails each day, on how many on average would have attachments?

- a. 35
- b. 10
- c. 20
- d. 40

9. How long does it take us on average to compose an email?

- a. 10 minutes
- b. 6 minutes
- c. 4 minutes
- d. 12 minutes

10. What percentage of email is for information only?

- a. 25%
- b. 35%
- c. 10%
- d. 18%

Score: _____/10

* based on research in *Managing Your Email* by Christina Cavanagh, 2003.

HANDOUT A11-2 WHEN TO USE EMAIL

	Email	Face/Voice
1. The message is information.		
2. You need an immediate response.		
3. You want to explain detailed instructions.		
4. The message may be controversial.		
5. You want to resolve different points of view.		
6. The message is confidential or private.		
7. You need to give the same message to a number of individuals.		
8. You want to discuss ideas and concepts and get reactions.		
9. You are announcing “good news.”		
10. You want to build a relationship with someone.		

HANDOUT A11-3 HANDLING INCOMING MESSAGES

GUIDELINES

- Scan all new messages for content, note those that are related and read forward from the first to the most recent.
- Sort by sender, project, etc. so you can read emails related to one topic.
- Deal with messages in priority according to sender, i.e., your manager's first.
- Read important messages word-by-word.
- After you have dealt with a message, file it or delete, so that you only handle it once.
- If you need to wait to handle a message, add it to your To Do list and plan how long and when you will be able to deal with it.
- If you are very busy or have to delay following up on an email, send an acknowledgement and let the sender know when you will be responding.
- Respond in the original message rather than writing a new message.
- Use templates when you are responding to repetitive inquiries or responses.
- Print a hard copy that you will need to file, take to a meeting, etc.
- Unsubscribe to any emails that you regularly delete without reading.
- Because of viruses, pay attention to suspicious subject lines or unknown senders. When in doubt, delete or call technical support.
- Delete all low-value messages. If there is a chance you might need them for later, file them.

HANDOUT A11-4 MANAGING YOUR INBOX

GUIDELINES

- Respond to email only as necessary and according to your priorities. Not every email requires a response, and most do not need a reply within 24 hours. Consider where responding fits with your overall work priorities and if the best response is by email.
- Schedule times when you check email during the day; for example, first thing in the morning, after lunch and at the end of the day. Short periods of focused concentration are most effective for handling it.
- Empty your inbox once each day. Refrain from using the inbox as a “To Do” list, a holding place for work in progress or to keep addresses.
- Turn off the alert feature. This is a distraction when you are doing other work and wastes on average 45 seconds of your time.
- Schedule a regular time to sort or delete your files, including your sent box; for example, weekly or monthly.
- Set the frequency with which your program sends and receives emails.

HANDOUT A11-5 EMAIL ETIQUETTE

WHEN SENDING EMAILS

- Tell each person what they need to do in response to your message. For example:
- Anne: please bring a draft of the plan to the meeting.
- Ted: please set up the laptop for Jay's presentation.
- Use the Priority feature appropriately. Readers get annoyed with frequent or inappropriate use.
- Limit the request for Receipt Notice. Consider asking readers to confirm getting your message if necessary.
- Use bcc to protect the privacy of multiple readers; use judgement at other times.
- Give readers the software and version for an attachment if the software is not a common program.
- Use a central shared file where possible rather than sending attachments to a number of individuals. Advise your readers of the location and what you need them to do with the document.
- Use of BLOCK LETTERS is equivalent to "shouting" at someone

WHEN REPLYING TO EMAILS

- Answer all requests or concerns. If you do not have an answer response right away, let the sender know when you will.
- Use Reply All only when necessary. The original sender may be the only person who needs to see a reply. If there is a need for a discussion, consider a face-to-face meeting or teleconference.
- Send courtesy messages such as thanks/welcome appropriately, do not feel obliged to respond every time you receive a message such as "Thanks".
- Limit [FWD [FWD] FWD] by changing the subject line to indicate your response, for example, inserting your new subject in capital letters followed by a colon in front of the original subject.
- Refrain from sending an email when you are emotional. If something is bothering you, take time to regain your composure before sending an email, or decide if you need another form of communication. Never put anything in email that you would not say in person. If you are struggling with how to express a message, you may be better to call or meet the person to talk it through.
- Redirect a message intended for another person and let the sender know that their message was misdirected. If you get a message that should be handled by someone else, suggest who that person should be. If you are sure, reply to the sender and forward the message to the more appropriate person and let the sender know the message has been forwarded.

FOR ABSENCES

- Use Auto Reply to let readers know when you are out of the office, when you are returning and who to contact in your absence if you have an alternate.

FOR RETURNED EMAILS

- If an email has gone back and forth three times or more, give the person a call or consider how to provide or ask for more details to avoid problems with delivery.

DISTRIBUTION LISTS

- Consider how many people on a distribution list need to receive the message. Send a message if it needs to go to 80% of those on the list. Consider creating a shorter list of only those who need the message.
- Keep distribution lists up-to-date as individuals move.

HANDOUT A11-6

CREATING SUBJECT LINES

GUIDELINES

- Always use a subject since readers tend not to read a message without one.
- Keep it concise as a long subject may get cut off in the sender's inbox.
- When you are forwarding or responding to emails, change the subject line, for example, by inserting in front of the original subject line and/or using all capital letters.
- Be specific, clear and concise; a descriptive subject line helps the reader by providing an accurate idea of what you are writing before they read the message.
- Put the action you need and direct requests in the subject line.
- Co-ordinate your subject line and opening so that you do not repeat the same information.
- When using a subject line for the message ... end with EOM (end of message)

EXAMPLES OF SUBJECT LINES

Original

Re: Project Report

Re: Information

Re: HRPAO membership

Revised

Re: Please comment on renovation timetable

Re: Details for the PHL study

Re: 2007 Renewal Notice: Action Required

PRACTICE

Improve these subject lines.

Re: Policy

Re: meeting

Re: Annual Audit Report

HANDOUT A11-7 COMPOSING EMAIL MESSAGES

GUIDELINES

- Keep messages short, with a few main points so that they will be read (one screen).
- If you need to send a long message, consider an attachment or a hyperlink.
- Begin with your most important information.
- Include all essential information for the readers: deadlines, addresses, times, directions, etc., so that they have everything they need.
- Consider numbering or point form for key details. Other highlighting features, such as colour, may not be received by your reader's software.
- Re-read your message for accuracy and tone before you send it.
- Use only those acronyms or short forms that your reader understands.
- Refrain from emoticons in professional emails.
- If you have trouble getting started, start with the phrase, "I am writing to tell you that," then delete it. Or try writing the first thought that comes into your head.
- For most day-to-day correspondence, a formal closing is not necessary, although it may reinforce your main point or give a deadline or next steps.

HANDOUT A11-8 EXAMPLES OF ACRONYMS

BTW	by the way	QTY'S	quantities
FAQ	frequently asked question	REC'D	received
FWIW	for what it's worth	RFC	request for comments
FYI	for your information	RGDS	regards
IMHO	in my humble/honest opinion	ROTFL	rolling on the floor laughing
IMO	in my opinion	RSN	real soon now
LOL	laughing out loud, lots of love	RTM	read the manual
MSGs	messages	THX	thanks
NLTT	no later than tomorrow	TTFN	ta-ta for now
NRR	no response required	TTYL	talk to you later
PRES	presentation	YR	your
PLS	please		

SAMPLE EMOTICONS

:) or :-) - smile

;) or ;-) wink

:(or :-(frown or sad face

@>->- Kudos or congratulations (a rose or flower)

HANDOUT A11-9 PRACTICE

Revise the following email to improve the subject line and message.

Re: Deadline

I am really concerned about our deadline. We haven't heard back yet from our supplier and I would like some lead-time before we do our presentation to ABC. As soon as you get the information from your contact, please send it to me, so I can review their schedule and projected costs. Then after I review it, maybe we can meet and discuss. Do you have any idea when their information will be ready? A delay would be unfortunate since I really don't want to have to reschedule ABC. It might be a good idea to give Susie a call to see where they stand.

COMPUTER SKILLS



(VUBIZ) - E-LEARNING TRAINING

MODULE B1 - B10

ESSENTIAL SKILLS

PRIMARY: COMPUTER USE

SECONDARY: THINKING SKILLS, DOCUMENT USE

The ability to use computers and other forms of technology is an essential skill for the workplace. The Modules listed below are designed to give participants an understanding of keyboarding, the internet and computer software applications used in business today.

We use blended delivery methods for the Computer Skills Modules that include instructor-led workshops, hands-on practice sessions and e-learning courses to ensure that each learner can work at their own pace.

MODULE B1

KEYBOARDING

In this course the participants will improve their keyboarding skills by using Mavis Beacon and Typing Tutor for Windows software. Keyboarding is scheduled every day and a combination of learning the keys and taking speed tests are followed in the tutorials to help them improve speed and accuracy. Progress is closely monitored by instructors and additional techniques are shown if needed.

MODULE B2

COMPUTER CONCEPTS

Using instructor led, e-learning and hands on practice exercises, the participants will get an overview of computer concepts of both hardware and software used. The participants will learn the parts of a computer, the basic functions of a computer and computer network, system software and applications software. Other topics may include: losing files and computer freezing, comparing different types of computers, attaching peripheral devices, and computer viruses.

MODULE B3

WINDOWS

Using instructor led, e-learning and hands on practice exercises, the participant will get an overview of working with Windows and explore the Windows desktop features like the taskbar, icons, start menu. The participant will learn how to open and close a program and switch between windows, identify and use the buttons, commands, scroll boxes and other controls in menus, toolbars and dialog boxes as well as use windows help, searching for files, using accessories and shut down the computer. The participant will understand the basics of file management in Windows environment. They will learn the importance of creating an effective filing system, discuss terms like files, folders, subfolders, and file path. Participants will practice creating folders, moving, copying, deleting files, restoring and searching for lost files.

MODULE B4

EMAIL

Using instructor led, e-learning and hands on practice exercises, the participants will learn the features and functions of using email. They will learn to compose and send new email messages, email addresses, folders, contact information, attachments, and delete messages. They will examine the difference between web-based and participant based email which includes learning various email participants and web email services. They will learn how to set up an email account e.g. hotmail, yahoo. Other topics may include: Junk mail filters, organizing contact information, understanding email etiquette, email spam and viruses as well as email dos and don'ts in business.

MODULE B5

INTERNET

Using instructor led, e-learning and hands on practice exercises, the participants will learn Internet terminology and how the Internet works. The participant will understand the terms website, webpage, Internet address, hyperlink, URLs, www. The participant will practice using an Internet browser, using search engines to find relevant information, understand about Google and other search engines available. Other topics could include: internet threats and viruses, internet safety, and how to prevent identify theft.

MODULE B6

INTRODUCTION TO MS WORD

Course Description:

Using instructor led, e-learning and hands on practice exercises, the participants will learn the basic features of MS Word. They will learn how to navigate the Word window, create and save a document, editing and formatting techniques including deleting, character formatting, spelling and grammar feature as well as using the help feature, previewing and printing documents. Other topics may include: inserting date, symbol, auto text, creating bulleted and numbered lists, and find and replace.

MODULE B7

MS WORD - INTERMEDIATE

Using instructor led, e-learning and hands on practice exercises, the participants will learn more intermediate features in Word. They will use the page setup dialog box (margins, orientation, paper size, and vertical alignment), paragraph alignment, indentation and line spacing, insert and format graphics, insert and format columns, insert and modify text boxes, borders and shapes. They will create and format a table, use headers and footers, create a table of contents, use AutoComplete and AutoFormat, format painter, inserting section breaks, using paragraph styles. Other topics would include: preview and save a document as a web page, insert and remove hyperlinks, collect and paste text and graphics using clipboard. Perform a mail merge, create envelopes and labels, and business cards.

MODULE B8

INTRODUCTION TO MS EXCEL

Using instructor led, e-learning and hands on practice exercises, the participants will learn the basic features of Excel spreadsheet software. They will learn how to create, save and navigate an excel workbook, enter and edit data in a worksheet, construct and copy simple formulas, use the Sum function, format data, cells, and worksheets, close and re-open a workbook. They will also learn how to use page layout view and prepare a worksheet for printing, and use options in the page setup dialog box.

MODULE B9

MS EXCEL - INTERMEDIATE

Using instructor led, e-learning and hands on practice exercises, the participants will learn the more intermediate features of Excel software. The participants will learn features used to manage lists in Excel like: sorting, filtering and subtotaling.

They will also explore creating more advanced formulas and inserting functions to analyze data in a worksheet. Relative, absolute and mixed references will be discussed. participants will learn how to represent data using various types of charts.

Optional topics could include linking worksheets using 3-D references, customizing menus and toolbars and importing and exporting data.

MODULE B10

INTRODUCTION TO MS POWERPOINT

Course Description:

Using instructor led, e-learning and hands on practice exercises, the participants will learn the basics of using PowerPoint to prepare presentations. They will examine the PowerPoint program environment and understand how to use the views, identify different toolbars and learn about the help features, create new and open existing presentations, save and close presentations. They will also learn how to format and edit slides and use insert, copy, delete and reorder features. They will learn how to chose slide layouts, apply backgrounds, paragraph settings: line spacing, indentation, tab settings, paragraph alignment, add and edit bullets and numbering, format clipart and pictures, print a presentation, and run and navigate a slide show.

PROFESSIONAL DEVELOPMENT WORKSHOPS MODULES C1-C8



MODULE C1 – C8

PROFESSIONAL DEVELOPMENT WORKSHOPS

ESSENTIAL SKILLS

PRIMARY: CONTINUOUS LEARNING;

SECONDARY: THINKING SKILLS, ORAL COMMUNICATION

The Discovering Life Skills series of nine English and five French manuals are sold to professionals nationally and internationally and are an excellent resource for trainers interested in delivering experiential learning workshops. YWCA Toronto is a national training center for Life Skills Coaches and the publisher of Life Skills resources. We have been training community leaders, coaches and facilitators since 1973.

The Discovering Life Skills manuals provide tested-and-tried lesson plans, tips, tools and training activities for learners at different levels of development. They contain a total of 525 lesson plans on generic Life Skills every individual develops to cope and problem solve aspects of work and everyday living. They are used by teachers, trainers, group leaders and facilitators in all areas of human service delivery. Our Life Skills methodology meets our participants at the start of their learning journey, regardless of how low or high their skills levels are.

The Modules listed below are what we deliver in our employment programs as part of the Professional Business Practices curriculum. They can be offered as half-day workshops.

MODULE C1

GROUP DYNAMICS

Using a combination of instructor led and group work activities, participants will learn to identify and change harmful group behaviour and focus on their individual strengths as the foundation of constructive contributions to group dynamics. Through exploring similarities and differences of group behaviours participants will be able to choose behaviours that are appropriate to their work roles and their needs.

MODULE C2

LISTENING SKILLS

Using a combination of instructor led and group work activities, participants will learn the basic listening skills and practice them to improve their listening and communications skills. They will understand the importance of good listening skills in improving productivity and relationships and will experience the benefits of greater understanding of work processes, team dynamics, supervisory feedback and efficiency in day-to-day tasks.

MODULE C3

SELF ESTEEM AND SELF TALK

Using a combination of instructor led and group work activities, participants will learn the importance of self esteem and it's impact on life's challenges and opportunities. These workshops focus primarily on activities and techniques to increase self-esteem and reduce or eliminate harmful and negative perspectives and attitudes. participants will gain an understanding of positive and negative effects of self esteem on themselves and other people and learn strategies to change negative thoughts into positive self talk.

MODULE C4

VALUES

Using a combination of instructor led and group work activities, participants will learn the importance of personal values and how they influence our choices and behaviour. participants will become aware of their own values, how they came to own them and the way they affect personal and professional visions and goals.

MODULE C5

TIME MANAGEMENT

Using a combination of instructor led and group work activities, the participants will examine various time management-tools including setting goals, keeping logs, and planning personal or work time. The workshop includes methods for identifying low pay-off activities and time-wasters and provides tips for organizing materials and surroundings for more efficiency. This training is rich in practical suggestions for taking control of time and life with simple, tried-and-true tools and techniques.

MODULE C6

STRESS MANAGEMENT

Description:

Using a combination of instructor led and group work activities, participants will learn about stress and how they perceive it. They will learn to become aware of stress triggers and how the body reacts to them, as well as coping strategies to reduce stress levels. They will be able to examine some stressors in their lives, how they respond both physically and emotionally and learn coping skills to deal with stress.

MODULE C7

GOAL SETTING

Using a combination of instructor led and group work activities, participants will explore a variety of ways to achieve successful goals. They will explore how setting goals can help them channel their energies and resources in a specific direction while focusing on what really matters. They will examine reasons why goal setting is important for continuous learning and identify the basic requirements to setting, planning and evaluation for successful goals.

MODULE C8

JOB RETENTION

Using a combination of instructor led and group work activities, participants will learn what is expected of them on their first day, first week, and first month of a new job. participants will learn techniques and strategies to maintain and advance in their jobs.

E-LEARNING/ CONTINUOUS LEARNING



MODULE D1 – D5

E-LEARNING/CONTINUOUS LEARNING

ESSENTIAL SKILLS

PRIMARY: CONTINUOUS LEARNING

SECONDARY: DOCUMENT USE, COMPUTER USE

In these modules, participants can upgrade their computer skill levels and learn professional development topics through self-paced online courses. When choosing the training that you offer, it is important to pay attention to learner readiness. Participants must have computer skills that enable them to navigate internet-based training, and the capacity to motivate themselves to access training regularly.

The Modules that we offer as part of the Professional Business Practices Curriculum are listed below.

MODULE D1

PROBLEM SOLVING

Problem Solving in the Workplace

Problem Solving the 5 Steps

Conflict Management

MODULE D2

PROJECT MANAGEMENT

Project Management: Getting Ready

Project Management: Goals and Stakeholders

Project Management: The Basics

MODULE D3

COMMUNICATION - VERBAL

Communicating at Work

Communicating as a Team

Communicating Interpersonally

Communicating Non Verbally

Communicating Persuasively

Communicating Proactively

Communicating Reactively

Communicating Cross-Culturally

Communicating Negative Messages

Enhancing your Speaking Skills

Report Organization and Presentation

Telephone Techniques

COMMUNICATION - WRITTEN

Business Writing Being Effective
Business Writing Letters and Emails
Business Writing Preparation
Business Writing Reports and Proposals

MODULE D4

CAREER MANAGEMENT

Developing Brand You
Developing Your Career Path
Managing Your Career Path
Networking Your Career path
Strategies for Meeting Goals
Individual Leadership Power
Individual Productivity Enhancement

MODULE D5

CUSTOMER SERVICE

Developing Strong Customer Relationships	Providing Service Excellence
Business Intercultural Etiquette	Creating Valuable Customer Relationships
Sales: The Basics	Telephone Skills
Sales: Qualifying Prospects	Creating Winning First Impressions
Sales: Team Effectiveness	Helping and Keeping participants
Sales: Telephone Skills	Diffusing Tense Situations
Sales: Cold Calls	Body Language On and Off the Phone
Sales: Closing	Practice Active Listening
Negotiating Skills for the Professional	Providing Quality Service
Customer Support	Communication Styles
Customer Support Online	Essential Multicultural Communication
Customer Loyalty Improvement	Introduction to the Sales Process
Communicating Persuasively	
Communicating Proactively	
Communicating Reactively	

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YWCA Toronto. Discovering Life Skills Volume 6: Communicating Assertively, 3rd Edition. Toronto: YWCA Toronto, 2006. Print.

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YWCA Toronto. Discovering Life Skills Volume 8: Employability for Youth. Toronto: YWCA Toronto, 2000. Print.

YWCA Toronto. Discovering Life Skills Volume 9: Employability for People with Disabilities. Toronto: YWCA Toronto, 2006. Print.

ADDITIONAL RESOURCES



ADDITIONAL RESOURCES

MODULE A1-A11

Owen Stewart Performance Resources <http://www.owenstewart.com>.

TEXTBOOKS

Kilgour, Lauralee, Edward Kilgour, Sharon Burton, Nelda Shelton and Lucy Mae Jennings, Administrative Procedure for the Canadian Office, 8th Edition. Toronto: Prentice Hall Canada,

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Cheinis, Efim, Dale Sproule. How to Find a Job in Canada, Common Problems and Effective Solutions. Toronto: Oxford University Press, 2008

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MODULE B1-B10

Microsoft Office 2003 Premium Edition by Thomson.

GO! With Microsoft Office 2007 Integrated Projects by Shelly Gaskin and Catherine Hain from Pearson and Microsoft Office 2007 by Shelly Cashman.

Keyboarding programs: Mavis Beacon Teaches Typing, Typing Tutor for Windows,

Kenexa Prove It: Testing software

RECOMMENDATIONS

Several manuals are readily available on the market. Many manuals used by private and community colleges would be suitable for our participants. The manuals have to be carefully chosen to suit the learner level and aptitude.

We choose to use a blended method of learning/teaching computer skills and have been using e-Learning courses, instructor-led workshops and hands-on practice sessions to ensure that all learning styles are addressed and each learners can learn at their own pace. We suggest the instructor oversees the learning process for each learner and that his/her progress is recorded for the learner's and instructor's reference.

MODULE C1-C8

DISCOVERING LIFE SKILLS PUBLICATIONS

Volume 1 - Building groups and warm ups

Volume 2 - Life Skills lessons on a variety of topics from self-esteem to goal-setting

Volume 3 - Life Skills lessons on a variety of topics from problem-solving to stress

Volume 4 - For special needs groups

Volume 5 - Life Skills lessons on a variety of topics from listening to expressing feelings

Volume 6 - Communicating assertively manual & companion video

Volume 7 - Teaching employment groups

Volume 8 - Employability for youth

Volume 9 - Employability for people with disabilities

MODULE D1 - D5

VU-BIZ E-LEARNING

RECOMMENDATIONS

If e-Learning is used in the core training or as a continuing education tool, various e-Learning training providers are available from which to choose.

An important factor to assess before deciding on how much e-Learning to introduce in your training is how many learners have regular access to the Internet and a computer at home or another venue. If not everybody can access training at home is there a computer lab with support available at the organization?

When choosing training, it would be important to pay attention to learners' readiness (e.g. do they have enough computer skills to navigate Internet-based training, do they have the capacity to motivate themselves to access training regularly, will they need additional support if they have questions arising from the training) and find training that is most suitable to the learner group.

ESSENTIAL SKILLS FOR EMPLOYMENT
PROFESSIONAL BUSINESS PRACTICES CURRICULUM



A TURNING POINT
FOR WOMEN

