EUROPEAN PERSONAL ASSISTANT LEVEL 2

WA7 Business Travel, Diary Systems, Meeting Organisation and Event Management

2.15 Use diary systems for routine business purposes

LO026 Demonstrate the ability to operate an electronic diary for routine business purposes to meet the needs of workgroups and customers

LO027 Demonstrate the ability to compare and contrast paper and electronic diary systems and report on findings to line manager

LO028 Demonstrate the ability to use diary systems to handle requests from others for new or modified diary entries in order to provide effective business support

LO029 Demonstrate the ability to make accurate diary entries and maintain an up-to-date system

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Module Details

Work Area Code:	7
Work area title:	Business Travel, Diary Systems, Meeting Organisation and Event Management
Unit Code:	2.15
Unit Title:	Use diary systems for routine business purposes
Learning Outcomes Ids:	LO026, LO027, LO028 and LO029
Learning Outcomes titles:	•Demonstrate the ability to operate an electronic diary for routine business purposes to meet the needs of workgroups and customers. •Demonstrate the ability to compare and contrast paper and electronic diary systems and report on findings to line manager. •Demonstrate the ability to use diary systems to handle requests from others for new or modified diary entries in order to provide effective business support. •Demonstrate the ability to make accurate diary entries and maintain an up-to-date system.
Recommended Duration:	5 hours
Trainer:	

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Time Management

- Time management is about: planning and controlling time spent on different activities.

- Goals: the main goal of time management is to increase efficiency.

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Diary systems and time management

- Time management is about
  1. Setting clear goals,
  2. Breaking your goals down into discreet steps,
  3. Reviewing your progress towards your goals.

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Diary systems and time management

- Diary systems are a tool for managing your time through
    1. **Decomposition of goals into activities**
    2. **Prioritising** - focusing on urgent and important tasks rather than those that are not important or do not move you towards your goals
    3. **Organising** your work schedule
    4. **List making** to remind you of what you need to do and when you need to do it
    5. **Persevering** when things are not working out and
    6. **Avoiding procrastination**

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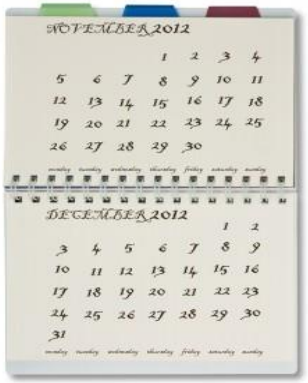
What is a Diary System

- It is the most valuable resource in any office.



- Diary Systems help someone to:
  - Plan an action
  - Coordinate this action
  - Recall a past memory that is important
  - Track statuses of actions and tasks avoiding procrastination and waste of time
  - . . . Be a professional!

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Occasions where diary systems are used in business

- For a future event:
  - Finding and booking suitable venues
  - Overseeing the dismantlement and removal of stands and other fixtures/fittings
  - Organizing additional facilities, e.g. hospitality/press areas, first aid, car parking or police traffic control

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Occasions where diary systems are used in business

- For a meeting:

When and where will take place

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Occasions where diary systems are used in business

- Birthdays, Name Days and Holidays:
  - For Social and PR activities (reminders for birthdays, name days etc)
- For travel arrangements:
  - The exact day, time, etc.
- For business meetings, customer presentations etc
  - For scheduling the meeting/presentation

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Activities involved in managing diary systems

- Obtain the information you need about requested changes or new activities
- Prioritise requested changes or new activities
- Identify the implications for existing entries (if any)
  - Solve problems that arise by negotiating alternative arrangements

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Activities involved in managing diary systems

- Record agreed changes in the diary
- Inform agreed changes to those affected
- Keep the diary up-to-date

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Need for sophisticated diary systems

- Administration employees have to spend significant amount of time trying to co-ordinate people's diaries in order to schedule meetings, deliveries, etc.
- A diary system allows meetings to be scheduled when the majority of people is available.

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Types of diary systems

Electronic VS Paper Based Diary System

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Types of Diary Systems

Manually

Electronically

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Electronic diary systems

- In our era, electronic diary systems are common and dominant
- Electronic diaries can be maintained on a personal computer, a laptop, a smartphone or an electronic organiser
- They can be shared with other people

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Types of electronic diary systems

- Types:

- Smartphones
- Laptops
- Outlook
- Tablets
- …

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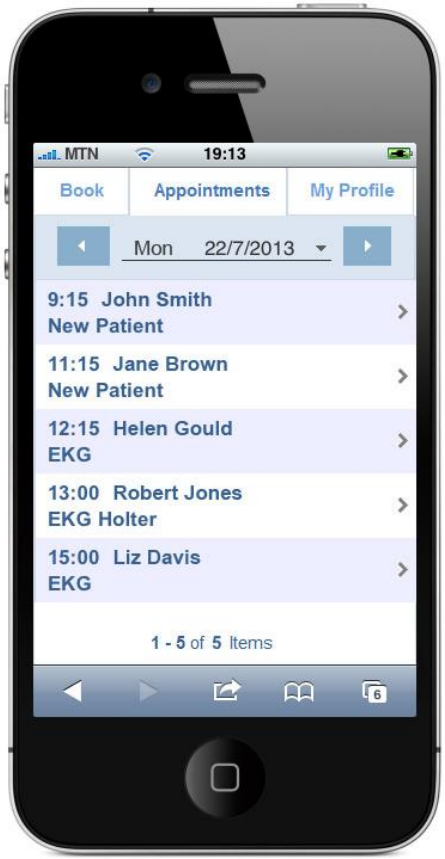
Common types of electronic diary systems

- Smartphones and tablets (Android and IOS) usually have such apps by default and you can download mo,re sophisticated ones
- Outlook, Thunderbird and Google calendars are the most popular ones that you can use and share on a pc
- In such systems you can:
  - Add appointments, meetings, events, etc.
  - Modify/edit them
  - Delete/cancel them



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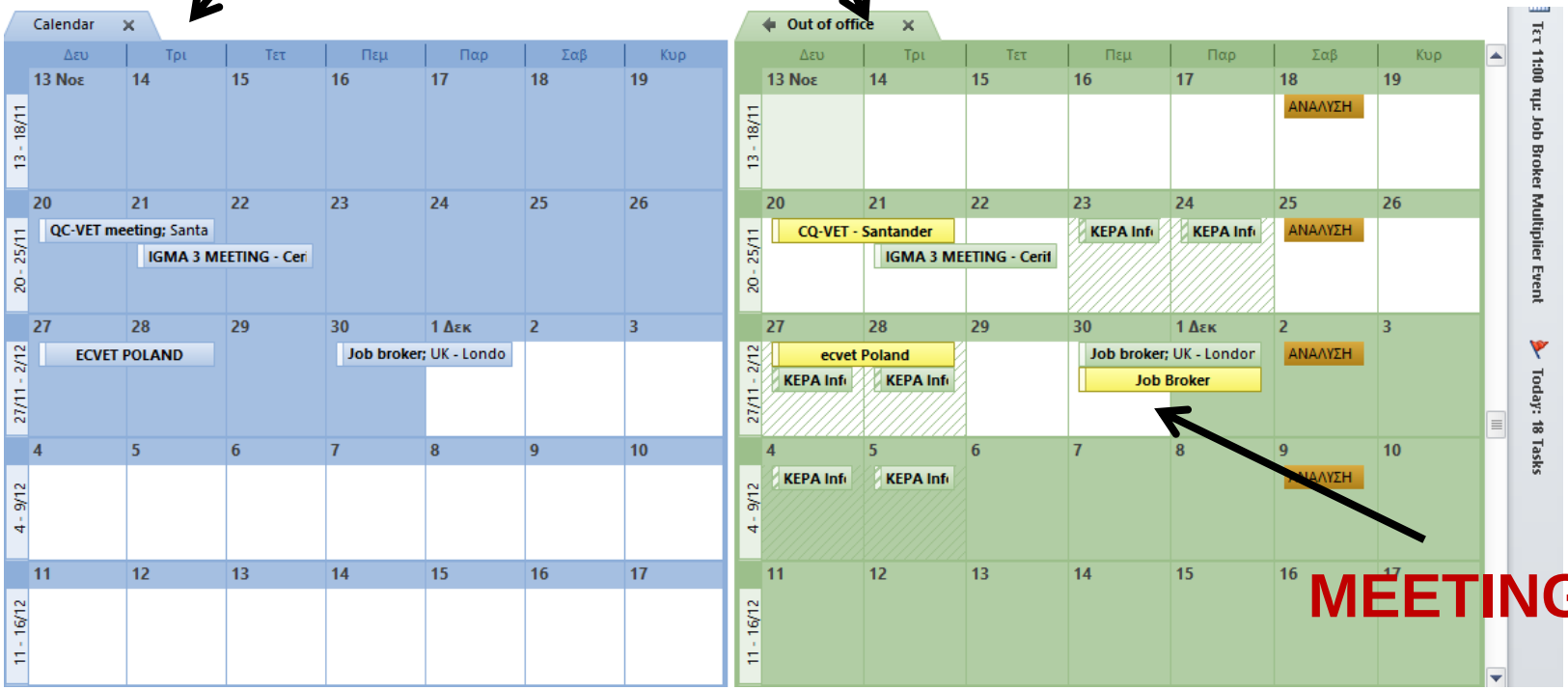
EXAMPLE: outlook

PERSONAL CALENDAR

SHARED CALENDAR



MEETING

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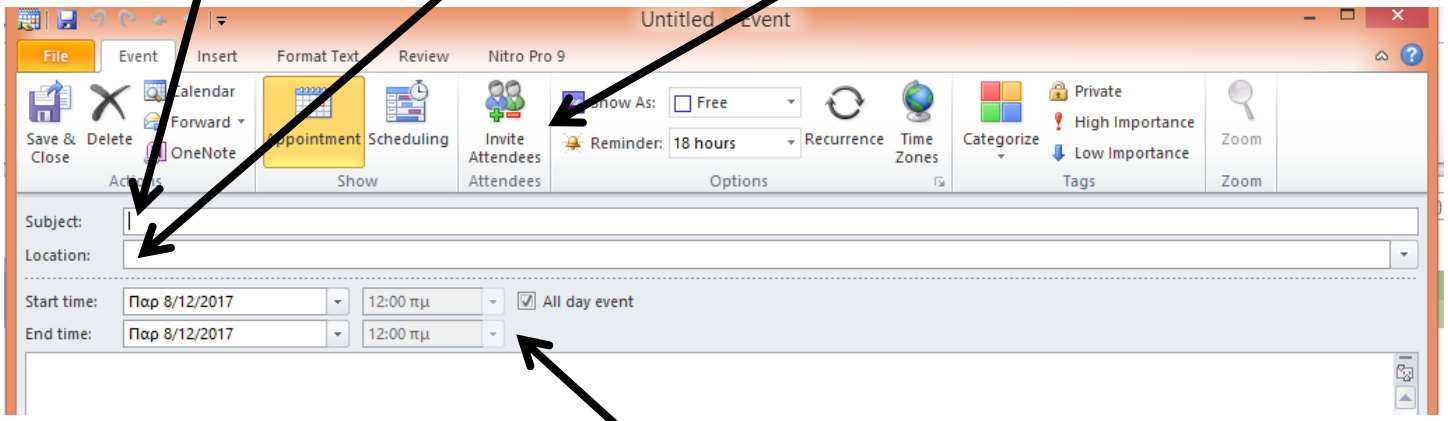
EXAMPLE: outlook

WHEN YOU DOUBLE CLICK ON A DAY, THIS WINDOW EMERGES:

HERE, YOU INPUT THE SUBJECT, E.G. MEETING WITH MARIA

HERE, YOU INPUT THE LOCATION, E.G. MARIA'S OFFICE

YOU CAN ALSO INVITE MARIA, TO MAKE SURE SHE WILL ADD IT TO HER DIARY



INPUT DATE AND TIME FOR THE MEETING

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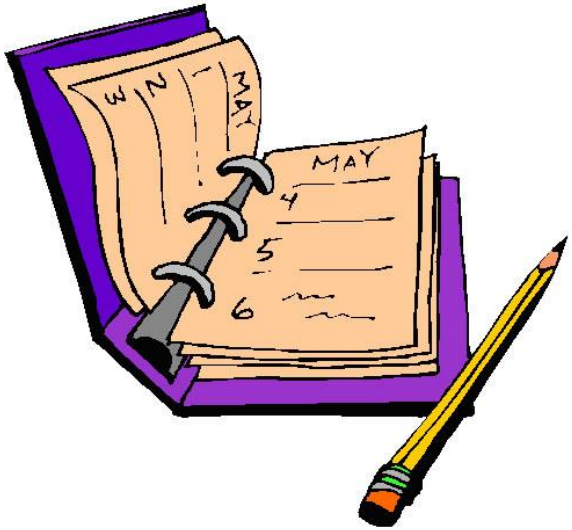
Electronic diary systems vs. needs

- The most important need covered by electronic diary systems is the need for synchronisation and time saving.
- When everyone has access to a shared diary, they all know their schedule and, where needed, other people's schedules
- They also ensure that we will not miss a deadline or a meeting with a customer



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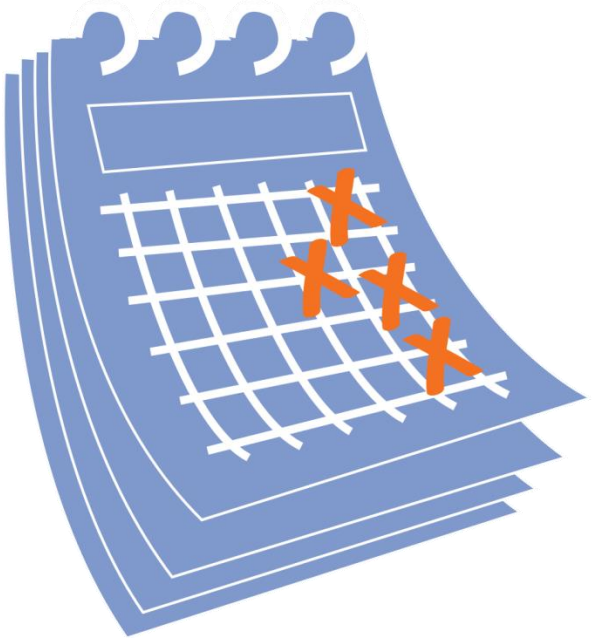
Advantages of electronic diary systems

- You can synchronize data between devices. Nowadays, this is a main advantage
- Possibility for Password Protection. Remember that security is always a big concern.
- Corrections are easy. You can synchronize corrections.



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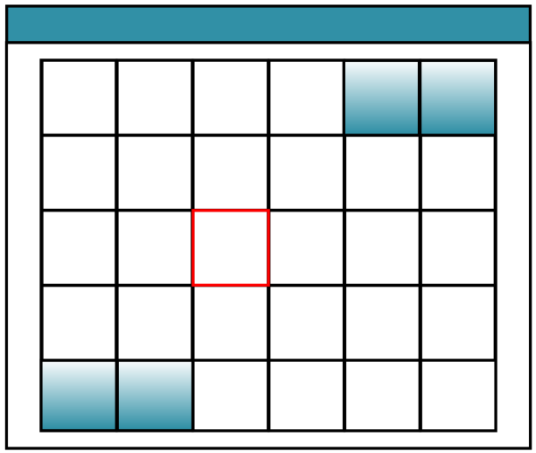
Advantages of electronic diary systems

- You can share with colleagues
  - In this case the issue of confidentiality might arise so you need to be extremely careful.

- Electronic diaries are extremely useful when they are set in HELP MODE.



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Advantages of electronic diary systems

- Highlighting potential conflict between appointments
- Entry of regular events once only
- Less paper is used.
- Password protection.
- Multiple access is available.
- On screen reminder of appointments.
- Database compatibility.
- Electronic contact.

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Disadvantages of electronic diary systems

- Where a computer using the information is a desktop computer and not a portable one.
- System failure could make the information inaccessible or, worse, all records could be deleted

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Disadvantages of electronic diary systems

- Not everybody is sufficiently computer literate to use the system

- Electronically held information is always at risk because of hackers. Remember that security is always a big concern.

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Manual diary systems

- The most common manual diary system is the bound book diary in which appointments are being recorded
  - These may be:
    - One day per page
    - One week to view
    - Different forms of diary systems exist

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Manual diary systems

- When you select the diary system that is appropriate for you, you need to consider:
  - The number of entries
  - The space per entry
  - Whether it has a locker, etc.

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Different Types of Manual Diary Systems

- Leaf loose systems:
  - The diary is continuous. You can always add new pages and you do not need to obtain a new one every year

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Different Types of Manual Diary Systems

- Time manager:
  - Has sections for names, telephones, addresses.

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Different Types of Manual Diary Systems

- Wall planners:
  - Are usually used for long-term planning

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Different Types of Manual Diary Systems

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Advantages of Manual Diary Systems

- More personal
- You can take them everywhere
- No IT skills needed

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Disadvantages of Manual Diary Systems

- Not easy to make corrections
- ‘Old-styled’
- You cannot share with colleagues

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Verbal exercise

Identify the information needed in order to set up a new diary entry

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Daily Work and Diary Systems

- Keeping a daily planner is one of the most important steps you can take towards getting organized

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Daily Work and Diary Systems

- One of the difficulties people often have in making a start is choosing whether to use an electronic planner or a paper based planner.

- A daily planner will help you spread out your workload while also helping make sure you do not make conflicting commitments.

- One of the most effective tips on time management methods is creating a task list (master list).

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The Master List

- Create the Master List and get rid of the stacks!
  - A list of all the tasks, TO DOS and other issues

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Probably you have been doing the following:

- Writing names, addresses and phone numbers on post-its and sticking them on your wall or desk
- Keeping a list of what you should do in the back of the files
- Writing in a hurry notes to yourself in every piece of paper you could get a hold off

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Instructions for creation and use of a Master List

- Use a big piece of paper A4- preferable having lines
- Write on each line - do not number the list - tasks are written randomly and not with priority
- Do not rewrite the list daily

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Instructions for creation and use of a Master List

- Delete the tasks that have been completed
- Transfer the tasks that have not been completed on the next page (given that they have been completed over 50%) - delete the tasks that have been completed (record, old lists)
- Do not worry about priorities

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Instructions for creation and use of a Master List

- Note them
- As soon as you add something to the list put a date on it. If there is a deadline add it
- Add new topics and do not spend time to complete them at that same moment

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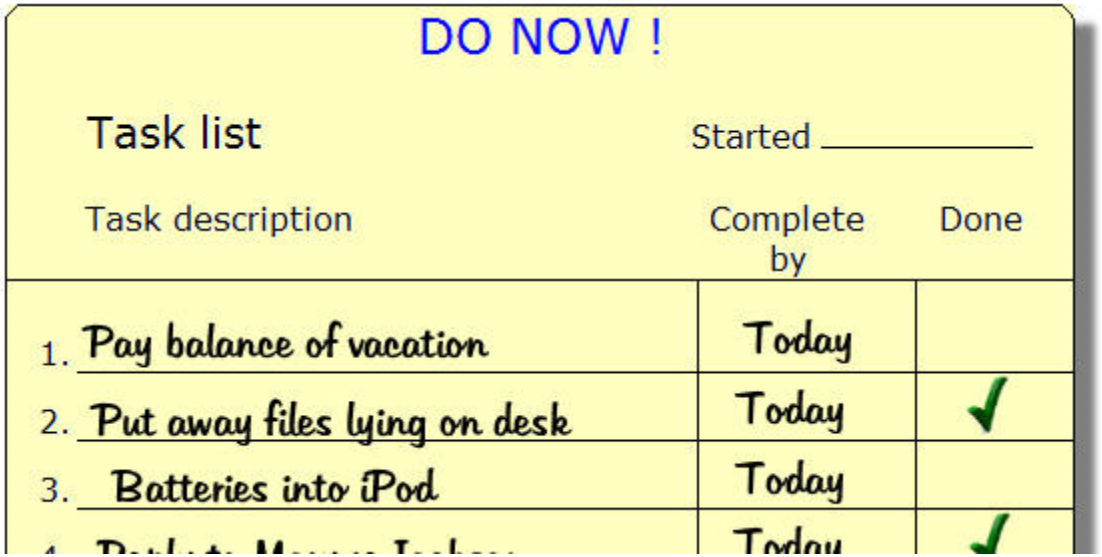
A simple Daily Diary System

- Prioritise your work
- Keep it simple
- Complete your tasks



DO NOW !

Task list — Started _____

Task description	Complete by	Done
1. Pay balance of vacation	Today	
2. Put away files lying on desk	Today	✓
3. Batteries into iPod	Today	
4.	Today	✓

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Advantages of a Master List

- It will help you do your job better and on time
- It will help you improve the quality of work you offer
- You will have full control of your schedule, your business obligations, your day and life

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Advantages of a Master List

Personal advantages:

- You will have less stress and tension

- You will have more time for social life

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Electronic Master Lists

- Use tools such as Outlook which can help you enter pending issues (and also assign them!)
- There are other similar programmes

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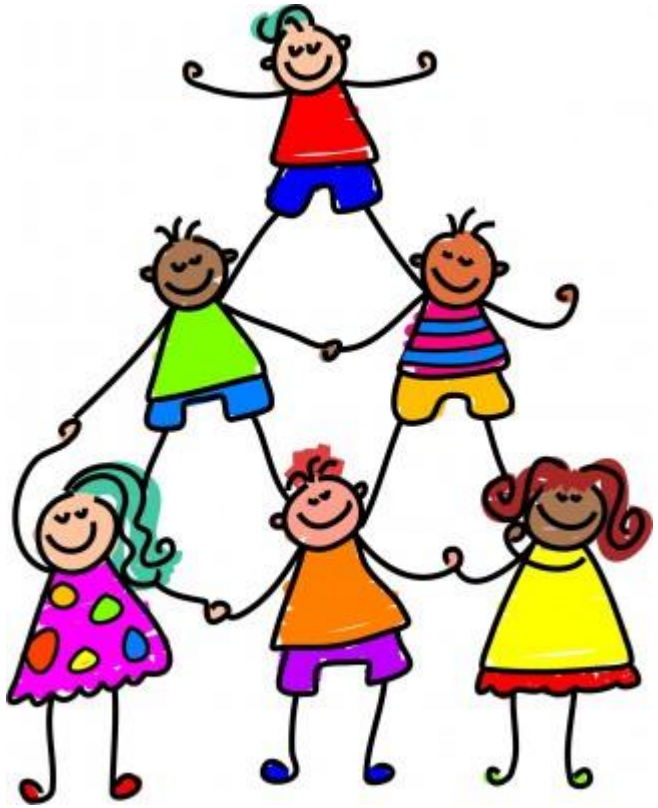
EUROPEAN PERSONAL ASSISTANT LEVEL 2

Handle requests, prioritizing, provide effective business support

- Handle requests:
  - Be efficient
  - Be effective
  - To the point
  - Use all the appropriate resources to get the proper information



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Handle requests, prioritizing, provide effective business support

- Prioritizing:
  - Respect deadlines
  - Consider the consequences
  - Consider time required
  - Set monthly goals and work backwards
  - Schedule a percentage of your time for personal projects

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Handle requests, prioritizing, provide effective business support

- Provide effective business support
  - Consider the hierarchy of the persons you are dealing with
  - Try to be helpful
  - Be a professional

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In a few words:

- In order to be efficient with diary systems you need to apply the following skills:
  - » Questioning
  - » Listening
  - » Analyzing
  - » Planning
  - » Organizing
  - » Problem Solving
  - » Using Technology
  - » Communicating
  - » Recording
  - » Negotiating

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In order to be efficient with diary systems you need to apply the following skills:

- Questioning: helps you to think about the whole process
- Listening: it helps you to summarize ideas
- Analyzing: it helps you to examine methodically ideas
- Planning: it will help you to develop how to do something
- Organizing: is the combination of tasks, resources and objectives
- Problem Solving: Nowadays problems are at the center of the daily activity. Accordingly, you will need skills to find solutions and to develop the steps required to reach each solution.
- Using Technology: technology is the core of many business management activities.
- Communicating: in the information age it is crucial to share information with others. Information is gold.
- Recording: is about having evidences and information.
- Negotiating: to have formal or informal discussions, bargain with others, in order to reach an agreement.

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EUROPEAN PERSONAL ASSISTANT LEVEL 2

Methodological tool

Using MS Outlook and a Mobile Phone Calendar

EUPANEXT_LO_026_M_01

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Methodological tool

EUROPEAN PERSONAL ASSISTANT LEVEL 2

Spot the Differences

EUPANEXT_LO_027_M_1

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Please Help Mary

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Maintain it up to date

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Key Points

- Time management is about: planning and controlling time spent on different activities.
- Goals: the main goal of time management is to increase efficiency.
- Electronic diaries are extremely useful when they are set in HELP MODE
- Where a computer using the information is a desktop computer and not a portable one.
- System failure could make the information inaccessible or, worse, all records could be deleted
- A daily planner will help you spread out your workload while also helping make sure you do not make conflicting commitments.

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EUROPEAN PERSONAL ASSISTANT LEVEL 2

Revision Questions

- Identify different types of electronic diary systems
- Describe different types of activities you can perform using an electronic diary system
- Describe how an electronic diary system enables you to meet the internal needs of the organisation (colleagues) as well as those of the customers.
- List different attributes of different diary systems
- List advantages and disadvantages of different diary systems (electronic and paper)
- Identifying issues of accessibility and confidentiality of different diary systems.
- List the details needed in order to handle the requests.
- List the factors you take into consideration for prioritising requests from different members of the workgroup
- List information necessary for making accurate diary entries

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Well Done!

You have completed this unit

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