

Secretarial Practice

By: Subhash G. Deo

This reference book can be useful for
BBA, MBA, B.Com, BMS, M.Com, BCA, MCA
and many more courses for Various Universities



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SECRETARIAL PRACTICE

FUNDAMENTALS OF SECRETARIAL WORK



Nature and Scope of Secretarial Work

INTRODUCTION

In this chapter we introduce the subject of secretarial practice. We start by stating the definition of *Secretary* and explain the importance of a Secretary and secretarial work.

We then describe the roles and duties of a Secretary. We follow this by discussing the qualifications that are necessary to become a Secretary. Then we also give the definition of a private Secretary and state the qualifications and duties of a private Secretary.

Every organisation needs to have an office to do the secretarial work. This work covers all types of activities carried out by the organisation, and thus requires an officer or executive to assist, overview and coordinate the whole work in an efficient way and ensure the integrity of the organisation all time. Such an executive is called as Secretary. Our interest here is in study of the meaning, importance, duties and qualifications of a Secretary in detail, and also in discussing various types of secretaries.

CHAPTER AT A GLANCE

WHO IS A SECRETARY?

The Oxford Dictionary gives following meaning of the word ‘Secretary’:

“One whose office it is to write for another; especially one who is employed to conduct correspondence, to keep record and to transact various

other businesses for another person or for a society, corporation or public body.”

The word ‘Secretary’ is derived from the Latin term ‘Secretarius’ which means “the keeper of secrets” or “the confidential officer”. *The Manual of Secretarial Practice* refers to the profession of a Secretary as one of the oldest one, and that wherever “there was a man of action, there, too, was a man of the pen to record his deeds.”

Hence, in general, special features of a ‘Secretary’ are as follows:

- (1) The Secretary is a person, male or female.
- (2) He is able to perform the works of confidential nature.
- (3) He works for another person or an organisation.
- (4) He holds an official position.

Today, the Secretary occupies a crucial and important position in industry, commerce, social institutions, clubs, government offices and also for individuals like statesmen, physicians, lawyers and members of Parliament. His duties and functions cover handling correspondence, keeping records and accounts, writing minutes and reports and also doing public relations work and acting as representative of the employer.

IMPORTANCE OF A SECRETARY

The nature and work of a Secretary vary with each particular institution for which he functions. In general, he does his work behind the scene and yet importance

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of his office can hardly be doubted. A Secretary is indispensable to any organisation, whether commercial, social or political. In certain cases he has a legal status as, for example, a company Secretary, or a Secretary of a Government Department. In other cases, he is employed to assist an employer to carry certain routine duties to free the employer to pay attention to more important things. However, under all conditions, the Secretary is the most trustworthy person of an institution of the employer for whom he works.

ROLE OF A SECRETARY

The nature of a secretary's role depends much on his position in relation to his employer and the functions he must perform. Depending on conditions of his employment, he may hold a very responsible position in an organisation, or he may just be a confidential assistant or one doing only routine clerical work. Clearly, the nature and importance of his work determine secretary's role. In turn, it is decided by factors like nature of the organisation, its size, employer's willingness to delegate work carrying responsibility, and also his own ability and willingness to carry responsible work. The secretary's role is also defined by the rights, duties and responsibilities under law, as is the case with a company.

However, in these days, a Secretary has to mostly perform the duties of one or more of the following positions:

- (1) Office executive,
- (2) Liaison officer,
- (3) Adviser to management

(1) As an Office Executive: As an office executive the Secretary has to hold responsibility of organising and managing daily work of the office. This consists of planning, supervising, co-ordinating and controlling secretarial and routine clerical work e.g. correspondence, record keeping accounts, etc. The secretarial work to be supervised and co-ordinated covers convening meetings by issuing Notice, making necessary arrangements for the meetings, keeping record of the proceedings at the meeting, etc. As the administrative head he has to resolve all matters concerning the office staff, including recruitment and selection, assignments of duties monitoring performance and ensuring discipline in the office.

(2) As a Liaison Officer: The Secretary functions as a link between business executives and outside

parties like clients, customers, and the public. He also acts as the link between top management and the administrative staff. In this way, he shields his employer from the necessity of dealing directly with the staff and outsiders on daily routine matters, and on subjects of normal interest. Whenever necessary, representing the management. He communicates decisions concerning the staff or members of the public. He also plays the role of Public Relations Officer (PRO) of the organisation, informing the public about activities of the concern and handling related correspondence. In practice, a Secretary is often the most capable of performing PRO's role as he knows thoroughly the objectives, plans and programmes of the organisation and its activities. The Secretary acting as liaison officer in this way, allows busy executives and managers to focus on their primary responsibilities in the long life interest of the organisation.

(3) As an Adviser: A crucial role that the Secretary has to often perform is that of an adviser to management. This may be out of necessity, as managers cannot have by themselves all information about a decision-situation, particularly related to policy matters. The Secretary as a part of his duties keeps himself abreast of latest developments in various fields. He also has on the spot knowledge of day-to-day activities of the organisation. He is, therefore, capable of giving advice to management for making appropriate policy decisions. The advisory role of the Secretary can be a part of his official status, or it can be privilege earned due to his integrity and efficiency. A Secretary is in an ideal position if the management asks his suggestions or seeks his advice reflecting the trust and confidence reposed in him. The exact nature of such advisory role depends on the nature and size of an organisation. In general, secretaries of trade associations, professional bodies, cultural organisations, company secretaries and secretaries of government departments have to perform the advisory role in varying degrees.

DUTIES OF A SECRETARY

The duties of a Secretary differ greatly depending on the terms and conditions of his employment and the employer's activities, and also his status in the organisation. There is a clear distinction between the duties of a 'Routine Secretary' and an 'Executive Secretary'. A 'Routine' Secretary is mostly the executive head of the office, managing daily office

work. His duties are mainly related to organisation and controlling office activities, i.e. ensuring clerical services to the organisation, efficiently and economically. In case of general services like correspondence, maintenance of records, etc. Relevant to all departments duties of the Secretary are just like those of a line executive. These duties include: selection, training, placement and remuneration of office personnel, providing necessary forms, stationery, machines and equipment needed for office work; and providing good working environment to the office staff for doing their work efficiently. The Secretary gives advice to the departmental heads about any special office activities they perform and his duties are those of a 'staff' officer.

The duties of an 'executive secretary' are much wider in scope. He carries out many administrative and managerial functions and is given executive powers accordingly. His duties may cover organisation and management of the secretarial department covering all personnel matters; conducting correspondence with other departments and with outsiders; organisation and control of accounting functions; representing management for negotiating contracts, settling legal disputes, etc. having liaison with clients, customers, and the public, and government departments, employees union, dealers and suppliers.

QUALIFICATIONS OF A SECRETARY

A Secretary has to perform many varied tasks and as such must possess certain basic academic qualifications, intellectual qualities and personal attributes. He must also have a specialised knowledge to suit the requirements of his organisation. This will help him to do his duties much better. Essential qualifications and attributes that a Secretary should possess are as follows:

1. General Education: Whatever the type of organisation he serves, a Secretary must have educational qualification of a fairly high standard. At least a Bachelor's degree in Arts, Commerce or Law is normally viewed a desirable qualification.

2. Proficiency in English Language: Verbal and written communications through correspondence are routine part of secretarial work. Therefore, proficiency in English language is basic for a Secretary. He must be able to interpret communications received and draft letters, reports, precis, etc. correctly. Only a good

command over English language is not enough. A Secretary must have knowledge and training in specialised use of English for business correspondence, drafting of resolutions and minutes of meetings, press releases, etc.

3. Knowledge of Other Languages: In our country knowledge of Hindi and some regional languages is bound to be useful to a Secretary for employment in a national-level organisation. Also, a Secretary working for an international organisation having branch offices in several foreign countries, will be considered more useful if he has working knowledge of one or more foreign languages.

4. General Knowledge: A Secretary who is well read and mentally alert is a valuable Secretary as he can do his duties better in a complex situation calling all-round general knowledge. Such a Secretary can also provide information of general importance that management may require from time to time. He is also in a position to give better advice.

5. Practical Knowledge of Office Management: A secretary's responsibility normally covers organisation and management of office activities. Hence, it is better for him to have practical knowledge of office methods and equipment, filing and indexing, personal computers and intercommunication systems. He must also be familiar with methods of selection and training of employees, pay-fixation, and provision of pension and provident fund benefits, welfare amenities, etc.

6. Personal Qualities: Apart from the qualifications stated above, following personal qualities are certain to make a Secretary successful in his job:

- (i) A good personality that commands respect and inspires confidence in his subordinates and colleagues.
- (ii) A healthy physical appearance, cheerful bearing and energetic disposition.
- (iii) Qualities of head and heart: good judgement and presence of mind, a strong sense of justice.
- (iv) Self-confidence and self-discipline.
- (v) Sincerity, integrity of character, and loyalty.
- (vi) Sense of responsibility, honour and dignity.
- (vii) A good memory of facts, faces and names.

IMPORTANCE OF SECRETARIAL WORK

Secretarial work is almost indispensable in the modern world. Organised activities in the social

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economic spheres have today expanded and are much complex. That is why, there is increasing need of secretarial services to help persons in authority in their day-to-day administration. The significance of secretarial work is particularly evident in industry, trade and commerce with their vast expansion in size and complexity in working of the organisations due to fast paced growth in manufacturing, transport and communication technologies along with growing markets for products.

The importance of secretarial work is attributed to (a) the onerous nature of secretary's functions and (b) the ever-growing dependence of management on secretarial help.

The job of a Secretary enjoys a sonorous respect. A private Secretary of a doctor or lawyer, or that of a business executive, often becomes indispensable to his employer because of the nature of work done by him which may include matters of a confidential nature and also financial transactions. The Secretary of any social organisation, educational institution, co-operative society or registered bodies does work with heavy responsibility. A company Secretary apart from being executive head of the office, has many other duties and responsibilities fixed on him under the law. He also carries administrative responsibilities like functional managers, in addition to the role of advisor to the top management.

The basic functions of secretarial office are: (i) receiving and collecting information, (ii) recording information or making records, (iii) processing information requiring computation and statistical work, and (iv) communicating information. On the one hand, the office has to provide information as collected, recorded and processed by it to the management as and when needed; on the other hand, its duty is to communicate policies, directives and instructions of the management to managers in different departments for their guidance.

Only because of the accurate information and factual data given by the secretarial office, management can formulate plans and policies and judge the results of its planned efforts properly. Also the system of communication provided by the office helps management in successfully directing, guiding and co-ordinating various activities. An effective control over business operations is possible because

of relevant factual information made available by the office.

These days computerisation has made recording and processing of information and its storage much easier. However, collecting data and receiving information from various sources is still an uphill task. Moreover, classifying information and data received, and preserving them in a proper easily retrievable form from computer memory is a special job.

The information and data are voluminous and varied and important. The nature of environment in which organisation functions is also very dynamic. Management thus depends heavily on the systems and procedures governing the flow of information, called as the Management Information System (MIS). The Secretary has to organise and manage the MIS.

Another crucial secretarial work is holding of meetings. This is of vital importance, because decisions taken at meetings form the basis of action. The responsibility of the Secretary here includes convening meetings, issuing Notice with Agenda and memoranda for consideration, securing adequate accommodation and seating arrangements, assisting the Chairman in conducting the meeting, recording the proceedings and preparing the minutes of the meeting, and finally circulation and confirmation of the minutes. The Secretary has also to take follow up action including communication of the decisions to the concerned parties. The management invariably depends on the Secretary to ensure that rules and regulations as laid down in legal enactments or by the organisation are strictly adhered to, so that the validity of meetings and proceedings/minutes are not in dispute or get challenged.

TYPES OF SECRETARIES

Secretaries perform varied types of functions and duties and therefore we can distinguish between the following types of secretaries based on their functions.

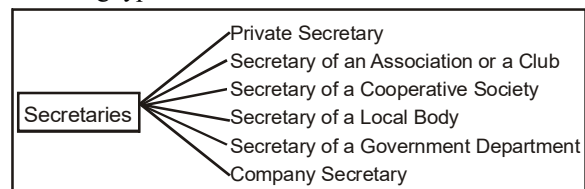


Fig. 1. Types of Secretaries

Here we focus our study on a private Secretary, nature of his job, qualifications he should have and the duties normally assigned to him.