

Number of methodological Tool	<b>EUPA_LO_028_M_031</b>
Work Area Code and Title	<b>2.7 BUSINESS TRAVEL, DIARY SYSTEMS, MEETING ORGANISATION AND EVENT MANAGEMENT</b>
Unit Code and Title	<b>2.7.3 Use diary systems for routine business purposes</b>
Learning Outcome Number and Title	<b>LO028: Use diary systems to handle requests from others for new or modified diary entries in order to provide effective business support</b>
Title of methodological tool	<b>Please help Mary</b>
Objective of the methodological tool	After the completion of this case study the participants will be in a position to: <ol style="list-style-type: none"> <li>Understand how to handle requests from others and organise the diary systems effectively</li> </ol>
Individual or group exercise	<input type="checkbox"/> Individual <input checked="" type="checkbox"/> Group
Type of methodological tool	<input type="checkbox"/> Written Exercise <input type="checkbox"/> Video Analysis <input type="checkbox"/> Simulation <input type="checkbox"/> Multiple choice <input type="checkbox"/> Group exercise with cards <input type="checkbox"/> Exercise using ICT <input type="checkbox"/> Role Play <input type="checkbox"/> Group discussion <input checked="" type="checkbox"/> Case study <input type="checkbox"/> Creative Group Work
Description of the exercise	<p>The participants are given a case study and are requested to help Mary to cope with a very difficult situation.</p> <p>The groups should read the case study and discuss it. Then each group must prepare a list of suggestions for Mary and present them to the class.</p>
Exercise is accompanied by	1. Case study: Please help Mary
Exercise solution	<p>Participants should demonstrate attention in the following:</p> <ul style="list-style-type: none"> <li>Identification of the need to leave some time during the day for urgent issues that may arise</li> <li>Flexibility for rescheduling if urgent issues arise</li> </ul>

	<ul style="list-style-type: none"> <li>In this case study, it is possibly better to reschedule the two supplier meetings, rather than to cancel the workshop which only takes place once every two years.</li> </ul>
Other comments to the trainer	Participants must demonstrate their understanding in handling urgent versus important issues. They should also demonstrate that they are able to realise that it is not feasible to add the activities required in the day (provided that Mary has to also attend the dinner) and therefore rescheduling is needed to accommodate urgent and important issues.

Attachments to the Methodological Tools

## Case study

### 1. PLEASE HELP MARY

Mary has been Mr Thomson's personal assistant for the last five years. Working with a company of 204 employees, Mary is Mr. Thomson's most important person in the company. She is basically managing his office.

Today is Wednesday the 7th of March and Mary has the following daily plan (calendar and task list):

<b>09:00-10:00</b>	Briefing by Mr Thomson regarding the conference (discussion on the details) <sup>1</sup>
<b>11:00-11:30</b>	Meeting with a new supplier on new file management system <sup>2</sup>

1. The conference is a very important event organised by the company every year. It is an international event. The conference will take place on the 3rd of July. Mary has the key responsibility for this event. Today, they will finalise the list of speakers and will take some decisions on the layout of the invitation. The venue will also be confirmed.
2. The meeting was requested by the supplier. He wants to present to Mary a new type of file management system. Although it is not in the near future plans of the company to change the file management system, Mary thought that it would be a good idea to have it in mind. Also, the supplier was very eager to get this appointment.
3. This workshop is organised by the leader in organising events for personal assistants. It is only organised once every two years and always handles very specific and advanced issues needed by personal assistants. This year the topic is event management for personal assistants.

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<b>13:00-13:30</b>	Meeting with an existing supplier to discuss an issue with the quality with some of his supplies
<b>14:00-16:00</b>	Attend a workshop for executive secretaries and personal assistants <sup>3</sup>

## Task list

- Prepare the invitations for the conference. This can only be done once the meeting with Mr Thomson is completed and decisions have been taken (Estimated duration of activity: 2 hours)
- Finalise venue for the conference and send confirmed booking by email (Estimated duration of activity: 2 hours)

Mary arrived at the office at 7:45 as usual (15 minutes earlier than her working time). She prepared her coffee and reviewed her calendar and task list.

She started dealing with the mail and then she prepared for the meeting with Mr Thomson. She needed to:

- Take to the meeting all the venue tenders to finalise the decision regarding the venue.
- Take to the meeting the samples of the invitation in order to finalise the decision on the invitation.

At 8:30 Mr Thomson arrives at the office and at 9 o'clock they have the meeting as scheduled and all needed decisions are finalised. Mary returns to her desk to start working on her tasks before her next meeting.

The telephone rings to change her day completely. She diverts the phone to Mr Thomson and they are being informed that one of their key associates, Mr Perry, is arriving to Cyprus unexpectedly tonight for something urgent and he wants to take the opportunity to discuss about a new contract with Mr Thomson. They have received the proposal ten days ago but they did not have time to look into it. . .

Mr Thomson calls her at his office immediately. She can tell that he is stressed.

Mary has to make all the arrangements (except the flight - he has already taken care of it). More specifically:

- She needs to book for accommodation
- She needs to book for a taxi to take him to the hotel
- She has to make dinner arrangements for tonight and she also has to attend the dinner
- She has to cancel all next day's appointments for Mr Thomson since he will have to spend the whole day with Mr Perry

Mary is panicking. She has three more meetings in the day and many unfulfilled tasks. It seems that time is not enough to complete her work.

## What do you suggest she should do?