Number of methodological Tool	**EUPA_LO_029_M_032**
Work Area Code and Title	**2.7 BUSINESS TRAVEL, DIARY SYSTEMS, MEETING ORGANISATION AND EVENT MANAGEMENT**
Unit Code and Title	**2.7.3 Use diary systems for routine business purposes**
Learning Outcome Number and Title	**LO029: Be able to make accurate diary entries and maintain an up to date system**
Title of methodological tool	**Maintain it up to date**
Objective of the methodological tool	After the completion of this case study the participants will be in a position to: 1. Make accurate entries and Maintain an up to day diary
Individual or group exercise	☒ Individual ☐ Group
Type of methodological tool	☐ Written Exercise ☐ Video Analysis ☐ Simulation ☐ Multiple choice ☐ Group exercise with cards ☐ Exercise using ICT ☐ Role Play ☐ Group discussion ☒ Case study ☐ Creative Group Work
Description of the exercise	The participants are given some tasks that a PA has to fulfil and are related to diary entries. They have to add entries in the diaries and spot any issues. Whenever a diary entry is possible it is being added to the calendar. Whenever a diary entry is not possible an action is entered on the master list.
Exercise is accompanied by	1. A case study 2. A paper-based diary in monthly form (copies of the daily form may be made by the trainer) 3. A master list
Exercise solution	Participants need to pay attention to the details. For example, the

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	cocktail on the 10th of July requires travelling to another city, therefore the meeting with the government agency must be rescheduled. A similar issue appears on the 4th of July with the project meeting and the meeting regarding photocopiers. In addition to the above, there are meetings that are conflicting, such as on the 4th of July at 15:00; we have the customer meeting and the meeting regarding the photocopiers that should be rescheduled since there is another meeting at 14:00. The following should appear on the Master List: • Propose a different day for the customer meeting (and inform the line manager that the proposed day for Mr. Gregory is not available) • Propose a different day for the government agency
Other comments to the trainer	-

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Attachments to the Methodological Tools

Case study

1. **Case Study: Maintain it up to date**

Imagine that you are Mr. Gregory's personal assistant Susan. You work at 'The Perfectionists' in Nicosia. Follow the instructions below:

a) **Susan starts the day by opening the mail.**
   i. One mail item is a cocktail party on the 10th of July at 18:00 organised by the Chamber. Mr. Gregory is an active member of the Chamber. The cocktail will take place at the Crown Resort in Limassol.
   ii. A personal letter from the headmaster of Mr. Gregory's daughter inviting him to attend a meeting to discuss vital issues related to the operation of the school. The meeting is on the 4th of July at 16:00 at the school premises.

b) **(Mr. Gregory), "Susan, I finally managed to get the appointment with the minister. You realise how important this is. Please add it in my diary immediately''**

Meeting with the minister: 3rd of July 2012 at 10:00

c) **Phone call**

(Caller) 'Good morning, I am calling regarding the photocopiers. I would like to make an appointment with Mr. Gregory.'

(Susan) Hello, this is Susan. May I ask who is calling please?

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(Caller) Oh hello Susan. My name is Ms. Smith.

(Susan) Hello Ms Smith. Mr. Gregory is actually very busy in July due to the forthcoming exhibition but I will speak to him and let you know. May I ask the reason of the meeting?

(Caller) Sure. A while ago we spoke for a maintenance contract for your printers and photocopiers. I am ready to present our proposal.

(Susan) Great. I will get back to you.

i. Susan calls her boss right away but the line is busy. In the meantime his next appointment comes and she goes to the kitchenette to bring some coffee.

[Move from your desk to the coffee area or somewhere else in the office and return in five minutes]

ii. The following email arrives

Dear Susan,

I am referring to the project ICT-EQ and I would like to inform you that the meeting has been arranged tentatively for the 4th of July at 14:00. Due to the high level of importance of the meeting, we request that all stakeholders will be present. Please confirm Mr. Gregory's availability. Lunch will be provided during the meeting.

5. Susan calls Mr. Gregory again to arrange the meeting regarding the photocopiers. He suggests the 4th of July at 15:00.

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d) Another email arrives from a government department responsible for monitoring and evaluating the work of your organisation

Dear Susan,

I do hope you are very well. As you know the evaluation period is approaching and I would like to organise a meeting with "The Perfectionists" in order to present your work for the current semester. Mr. Maggie and I suggest the 10th of July at 16:00. The meeting will take place in our offices. Presentation equipment will be provided (please let me know what you will need). Please confirm your and Mr. Gregory's availability at your earliest convenience.

e) Telephone call from one of the line managers

Hi Susan. I am closing a deal with a very important customer. He wants to meet Tony (Mr. Gregory). Can we do it on the 4th of July at 15:00?

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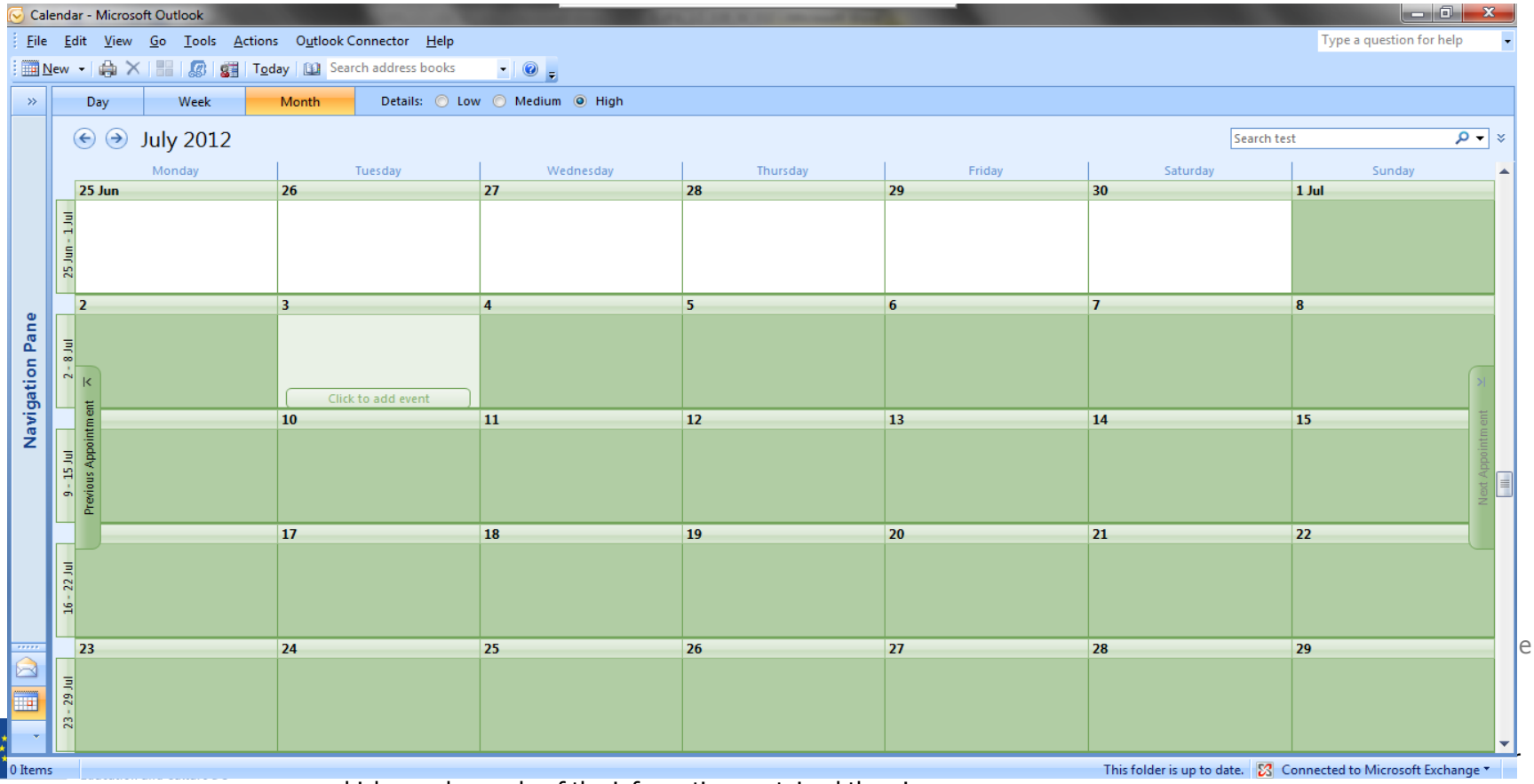
2. A paper-based diary



any use which may be made of the information contained therein.

3. Master List

1.
2.
3.
4.
5.
6.
7.
8.

[These attachments can be found in electronic format on the enclosed CD]

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