50 Training Activities for Administrative, Secretarial, and Support Staff

Elizabeth Sansom
Christine Newton

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Preface

Support staff carry out the essential tasks that make organizations succeed. They are frequently the “unsung heroes and heroines” of the organization and often, unfortunately, the ones for whom the training budget “does not stretch” or who “cannot be spared” from their work to spend time in training.

This manual of activities has been written specifically for support staff who would benefit from training and need it to be carried out in short sessions and preferably in-house. The activities will help you motivate your staff, encourage them to achieve the best possible standards, and enable them to grow with their jobs, which are constantly evolving.

We feel passionately that investing time and effort in developing support staff builds a committed workforce and a more successful organization. These activities can be run effectively by supervisors or managers who are not “trained trainers.” They all actively involve the participants and therefore maintain interest easily. When learning is fun, it has much more impact, and we have incorporated this theme wherever possible.

We would like to thank all our clients who have given us first-hand feedback on the effectiveness of our training and helped us to put together this comprehensive training manual.

We hope that you will enjoy using the activities and reap the rewards of continued success.

Elizabeth Sansom and Christine Newton
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Introduction

Open communications and involving the workforce were buzzwords in the 1990s. Many quality initiatives have encouraged organizations to continuously develop their people. However, for many organizations, the time commitment and cost of external training have been prohibitive. This manual of activities seeks to bridge that gap and enable small and large organizations alike to invest in the development of their support staff and to do it in a timely and cost-effective way.

Activities

The topics covered are of importance to all people at work, not only support staff. However, to date, there have been few training resources available that address these topics specifically for this group. When these topics have been included in management and development programs, support staff are rarely invited due to the belief that they may feel inhibited by the presence of more senior people. So here is a resource designed specifically to introduce business fundamentals to support staff. Underlying the activities are two principles: maximum involvement of the participants and building individual self-confidence.

All the activities in this manual stand alone, but many may be effectively run in sequence. This is indicated in the introduction to each part.

Trainer

To enable these activities to be run by people who are not trained as trainers, we have incorporated trainer’s notes, anticipated responses, and reference materials. We have also provided comprehensive handout material, unless this is to be produced by the participants themselves.

Location

The activities are mainly designed for small groups and can be run in any meeting room. We strongly suggest that they not be run within a department area where telephones and people requiring assistance may cause interruptions.

Communication

Obviously it is always necessary to make sure that training sessions cause the minimum disruption to day-to-day operations. So once approval to run the session has been granted, the people for whom the participants work need to be informed that they will not be available during that time. It is a good idea to remind everyone again two days before the event.
Tips for Trainers

1. Organizing groups for teamwork.

While a trainer will occasionally want to decide for a particular reason which participants should be teamed up together, often the mix of people in a group doesn’t matter. Here are some suggestions to help liven up the process of picking teams when it doesn’t matter who works with whom:

- Take a deck of playing cards and select a suit to represent each group and cards from each suit to represent the number of people in each group. Shuffle the selected cards, and holding them face down, ask the participants to pick one card each (or you can deal them out).
- Buy a package of stickers, for example, sets of flowers, animals, insects, birds, or toys. Put a sticker on an index card for each group (possibly the daffodils, the tulips, the roses, and the irises). Make enough cards for all the members of each group you want to form, shuffle them, and holding them sticker side down, ask each participant to pick one.
- Purchase packages of wrapped candy (a different type of candy for each group). Decide how many people are to be in each group, and put that number of each type of candy into a bowl. Hand the bowl around, insisting that everyone take one even if they don’t want to eat it. You will then have a group of Kisses®, a group of M&Ms®, a group of Skittles®, and a group of Life Savers® (or similar).
- Pick a set of leaves for each team (fairly large leaves are best). Put enough of each type (for the number of people you want in each team) into a basket and ask each participant to pick a leaf. You will then have the oak, maple, birch, and chestnut teams (or similar).

2. Prizes.

Awarding prizes can add a sense of fun and lighthearted competition to some activities. Prizes do not have to be expensive, serious, or work-related. Here are some ideas:

- Create a prize basket with a selection of low-cost items: for example, packs of tea and coffee, unusual highlighter pens, pencil tops/erasers, small candles, inexpensive letter openers, stress toys, packets of Post-it® notes, small soaps, and so on. Pass the basket to winners so that they can choose a prize.
- Ask each participant to bring a piece of fruit with them to the training session, and put these in a bowl when they arrive. When someone “wins,” pass them the fruit bowl to choose an item as their prize.
- Ask each participant to bring a prize (without specifying what) and have them put it in the prize basket as they arrive. Agree on the maximum cost of items with the participants in advance.
Activity Time Checklist

Single-Session Activities

Up to 60 minutes…
1. You Betcha!
2. Have I Got News for You!
3. The VIP
4. Totally Professional
5. I know what you said, but what did you mean?
6. If I had to choose…
7. Chants of a Lifetime
8. Right the First Time!
9. The Promises We Make
10. Delivering Bad News
11. Mind Your Language!
12. Beyond the Call of Duty
13. No Problem!
14. Ring, Ring
15. My Colleague Can Help You!
16. Behind the Screen
17. What’s the Difference?
18. With Reference To…
19. The Truth about Sentences
20. Agenda Setting
21. Just a Minute!
22. From Notes to Minutes
23. Investing in Success

60 to 90 minutes…
19. So what you are saying is…
20. I’m Sorry, I’ll Ask That Again
21. Getting My Point Across
22. Words, Words, Words
23. That’s it! Period.
24. Making an Impression
25. The White Rabbit and the Queen of Hearts
26. Up at the Front
27. Getting Organized
28. Keeping Track
29. What Happens Next?
30. Are You Following Me?
31. I Know I Can Do It!

(continued)
Activity Time Checklist (concluded)

Up to 2 hours...

33. What I Need to Do First
34. Saying "No"

Variable Timing (depending on the number of participants and/or optional activities chosen)

24. It’s Me You Want! (1½ to 2 hours)
36. Help! (2 to 3 hours)
48. In Rehearsal (2½ to 3 hours)
49. I’m Glad You Asked That! (1½ to 2 hours)

Three-Part Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>First Session</th>
<th>Research</th>
<th>Second Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 Treasure Trail</td>
<td>15 min.</td>
<td>Up to 2 weeks</td>
<td>Up to 60 min.</td>
</tr>
<tr>
<td>4 The Office Bible</td>
<td>15 min.</td>
<td>Up to 2 weeks</td>
<td>Up to 90 min.</td>
</tr>
<tr>
<td>6 Proud to be Part of the Team</td>
<td>90 min.</td>
<td>Up to 6 weeks</td>
<td>Up to 60 min.</td>
</tr>
<tr>
<td>8 The Path to Success</td>
<td>20 min.</td>
<td>3 hours</td>
<td>Up to 45 min. per person</td>
</tr>
<tr>
<td>9 How Am I Doing?</td>
<td>90 min.</td>
<td>Up to 6 weeks</td>
<td>Up to 60 min.</td>
</tr>
<tr>
<td>10 How Can I Help You?</td>
<td>10 min.</td>
<td>Up to 2 weeks</td>
<td>Varies according to number of participants</td>
</tr>
<tr>
<td>37 Snakes and Ladders</td>
<td>2 hours</td>
<td>Up to 4 weeks</td>
<td>Up to 90 min.</td>
</tr>
</tbody>
</table>
Activity 40

Keeping Track

Description
This activity introduces the project control sheet—a simple grid on which to record and monitor the events of a project.

Target Group
Support staff who wish to learn simple techniques for running and managing small projects.

Objectives
• To practice using project control sheets as an organizational tool
• To build confidence in managing tasks for the first time

Number of Participants
4 to 12

Time
90 minutes

Materials
• Flipchart and markers
• Worksheets 40-1 and 40-2

Preparation
Photocopy Worksheets 40-1 and 40-2 for each participant. Participants may require several copies of Worksheet 40-2.

Method
1. Introduce the purpose of this activity, which is to demonstrate that effective forms of monitoring and controlling the events, activities, or steps in a project can be simple to construct and to use.

2. Give each participant a copy of Worksheet 40-1, which illustrates the sequence of events needed to organize a meeting. (Of course, some people will use e-mail, but do not let this detract from the validity of using such a method of monitoring.)
Activity 40 (continued)

3. Explain that Worksheet 40-1 shows the sequence of events across the page and a list of people who will be involved in those events down the left side of the page.

4. Give the participants the following verbal instructions, but do not guide them as to how to fill out the appropriate sections of the control sheet; instead, tell them to choose their own method for marking their chart and that they can compare with each other later. The instructions are as follows:
   - Persons A, C, and D can work on all date and time options.
   - Person B is free on date and time options 2 and 3.
   - Person E is free on date and time option 3.
   - Person F is free on date and time option 1.

5. Before you continue with this exercise, ask the participants how they might continue in the real world if a situation like this occurred, and how they would amend this control sheet in order to take their actions into account.

6. Now ask the participants to record the following sequence of activities. Again, do not tell them how to record this; allow them to design their own method that they can present to the rest of the group.
   - The room was booked on May 5th.
   - Confirmations were sent on the same date.
   - Person B submitted an agenda item on May 7th; the rest were followed up on May 10th.
   - Persons A and F submitted agenda items on May 11th; Person E sent in an item on the following day; the rest were followed up on May 15th.
   - Person C submitted an item on May 16th; the agenda was prepared and circulated on the same date.

7. Ask the participants to show each other their completed control sheet and encourage a discussion on the various methods used to record these data.

8. Now ask them when, where, and how they might use this technique in projects of their own and write their ideas on a flipchart.

9. Hand each participant a copy of Worksheet 40-2.

10. Decide whether you would prefer the participants to work independently or in small groups.
Activity 40 (concluded)

11. Ask them to choose one of the suggested projects on the flipchart and show how it could be monitored and controlled by using a project control sheet.

12. Ask the individuals or groups to present their work to each other and encourage a discussion on the merits of the different systems/techniques used for recording data in this way.
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# Meetings Control Sheet

Title of Event: _________________________________________________________________

<table>
<thead>
<tr>
<th>Date and Time Option 1</th>
<th>Date and Time Option 2</th>
<th>Date and Time Option 3</th>
<th>Room Booked</th>
<th>Confirmation Sent</th>
<th>Items for Agenda Requested</th>
<th>Items for Agenda Followed Up</th>
<th>Items for Agenda Followed Up</th>
<th>Agenda Compiled</th>
<th>Agenda Circulated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person A</td>
<td></td>
<td></td>
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<tr>
<td>Person B</td>
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<tr>
<td>Person C</td>
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<tr>
<td>Person D</td>
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<tr>
<td>Person E</td>
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<tr>
<td>Person F</td>
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# Project Control Sheet

Title of Event: _________________________________________________________________

<p>| | | | | | | | | |</p>
<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Person A</td>
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<td></td>
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<tr>
<td>Person B</td>
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<tr>
<td>Person C</td>
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<td></td>
<td></td>
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<tr>
<td>Person D</td>
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<td></td>
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<td></td>
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<tr>
<td>Person E</td>
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<tr>
<td>Person F</td>
<td></td>
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</table>

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Activity 41

What Happens Next?

Description
This activity introduces the “storyboard” technique—another simple, yet effective, method for organizing the stages of a project. The activity then goes on to practice and consolidate learning from the previous activities in this part of the manual.

Target Group
Support staff who wish to learn simple techniques for running and managing small projects

Objectives
• To introduce the “storyboard” technique
• To review the techniques introduced in Activities 38 through 40
• To build confidence in planning and managing small projects

Number of Participants
4 to 12

Time
90 minutes

Materials
• Paper, index cards, or Post-it® notes
• Transparency 41-1
• Overhead projector and screen
• Trainer’s Notes 41-1

Preparation
Familiarize yourself with the contents of Trainer’s Notes 41-1 and Transparency 41-1, which can also be used for reference while conducting the activity.

Method
1. Introduce the objectives of this activity, reminding the participants that simple techniques are often the most effective for managing complex situations.
Activity 41 (continued)

2. Tell the whole group that they have been asked by their training department to help with the production of a new in-house training course. This project will involve them in planning for:
   - Researching, drafting, and producing materials for the main text
   - Producing support materials, such as overhead transparencies or slides
   - Producing audio and video media to support the text
   - Deciding on the design and layout of the package
   - Contracting in expert help, such as graphic designers and printers, where needed

3. Depending on the size and experience of the group, either assign them the task individually or divide them into smaller groups.

4. Either introduce the technique of mind mapping, or remind the group of the mind mapping activity that they have recently completed (Activity 38), and ask the individual participants or small groups to mind map the steps of this project. Repeat what you said in #2 above if they need to be reminded.

   Note: If you have a large number of participants, you may prefer to give each group a separate section of the whole project.

5. Conduct a feedback session and encourage an exchange of ideas and information.

6. Introduce the concept of a “storyboard.” This is the technique of writing a single thought, idea, or step in a procedure on a single sheet of paper, index card, or Post-it® note. These are then displayed across a table and moved about to produce the final sequence of events. The greatest advantage of this technique is its total flexibility and the way it allows creative thinking at the planning stage—nothing is fixed, new ideas can be added, and the original sequence can be changed.

7. Distribute plenty of paper, index cards, or Post-it® notes and ask the individual participants or groups to “storyboard” their project or section of the project.

8. Conduct a feedback session and encourage an exchange of ideas and information. This activity can end here with a discussion on the value of storyboarding as a technique, or you can continue with #9 below.

9. Either introduce the technique of process charting or remind the group of the process charting activity that they recently completed (Activity 39) and ask the individuals or groups to draw a process chart from their storyboard.
Activity 41 (concluded)

10. Conduct a feedback session and an exchange of information and ideas. Display Transparency 41-1 as a suggested answer. You can now choose to end this activity here with a discussion on the development of the project so far and the use of the three simple yet effective project management tools listed, or you can continue with #11 and #12 below.

11. Either introduce the project control sheet, or remind the group of the project control sheet activity they recently completed (Activity 40). Ask each individual participant or group to take one aspect of the project and prepare a project control sheet to manage and monitor that specific step.

12. Conduct a final whole group discussion to evaluate the effectiveness of the project management techniques introduced and practiced and to help the group identify where and how they might use these techniques in their own projects in the future.
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Feedback Reference Notes

There are no right or wrong answers for this activity, so we provide below a list of ideas to guide your feedback sessions. Of course, it is quite likely that your group will suggest even better ideas than these—keep them for future reference.

- The overall project needs a plan.
- Time must be estimated or deadlines set.
- Resources must be allocated or negotiated for.
- People must be identified—skills and availability need to be considered.
- The text must be:
  - Planned in outline
  - Drafted
  - Tested
  - Edited
  - Laid out
  - Proofread
  - Printed
  - Packaged
- The support materials will need to go through the same stages as above and be matched up to the main text.
- The audio and video media will each need to be:
  - Planned
  - Matched to the main text
  - Scripted
  - Rehearsed
  - Recorded
  - Tested
  - Produced
  - Packaged
- The overall package will need to be:
  - Planned
  - Coordinated
  - Designed
- Artwork will need to be commissioned, reviewed, and accepted.
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Process Chart: Suggested Answer
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