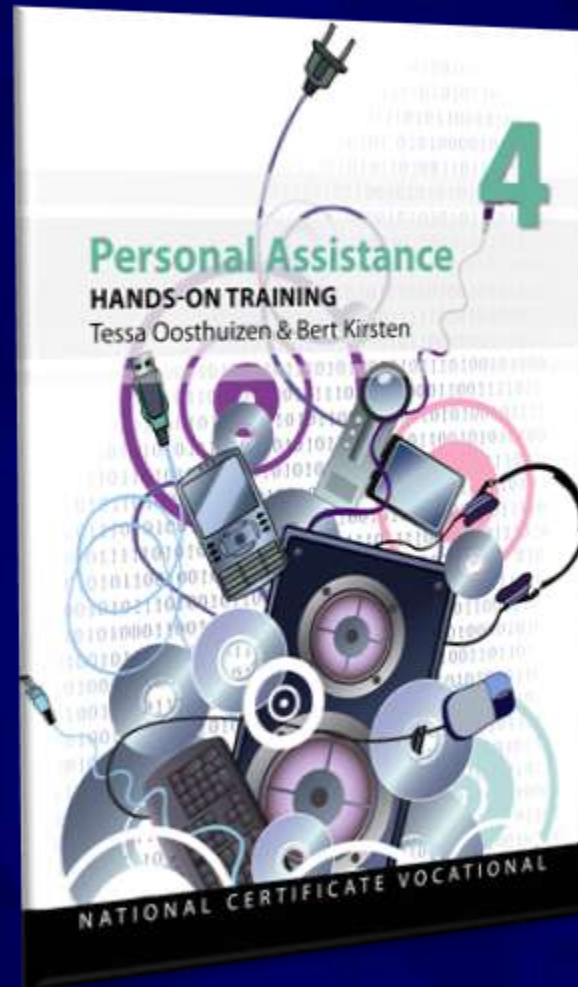
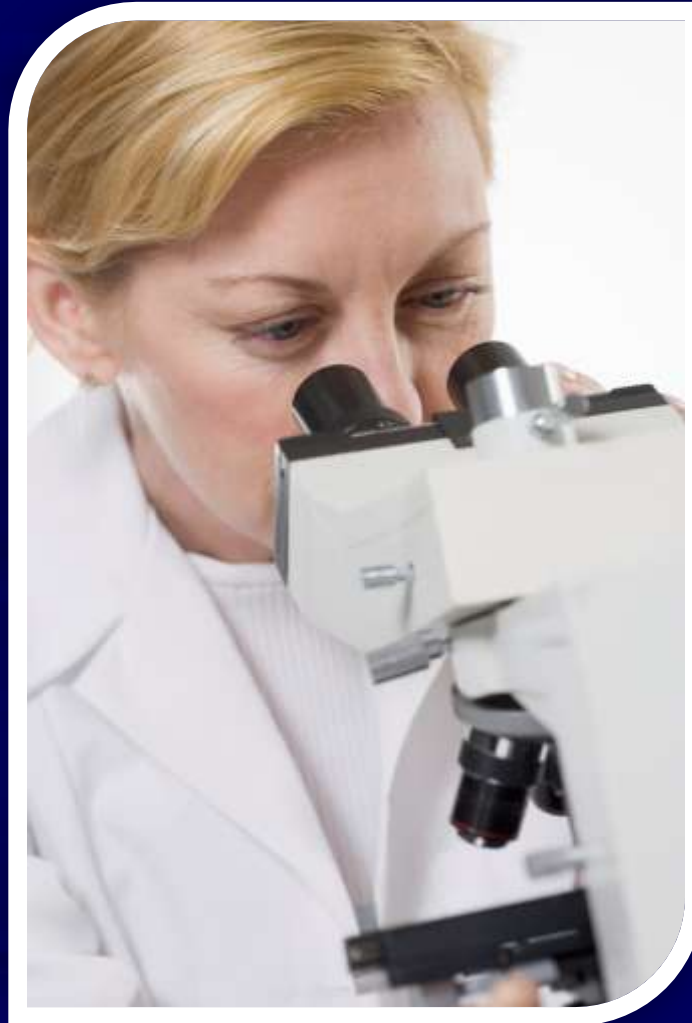


Personal Assistance 4



Module 7: Identify expertise and resources



Module 7: Identify expertise and resources

- **After completing this module, you will be able to:**
 - **Determine criteria for expertise and resources**
 - **Establish and record expertise and resources**
 - **Report on expertise and resources**

1. Determine the criteria for expertise and resources

- *After completing this subject outcome, you will be able to:*
 - identify expertise and resource needs and include required competencies and attributes
 - produce estimates of resource needs
 - confirm expertise and resource needs with key persons and obtain authorisation within scheduled time frames
 - set clear, concise criteria for expertise and resources.

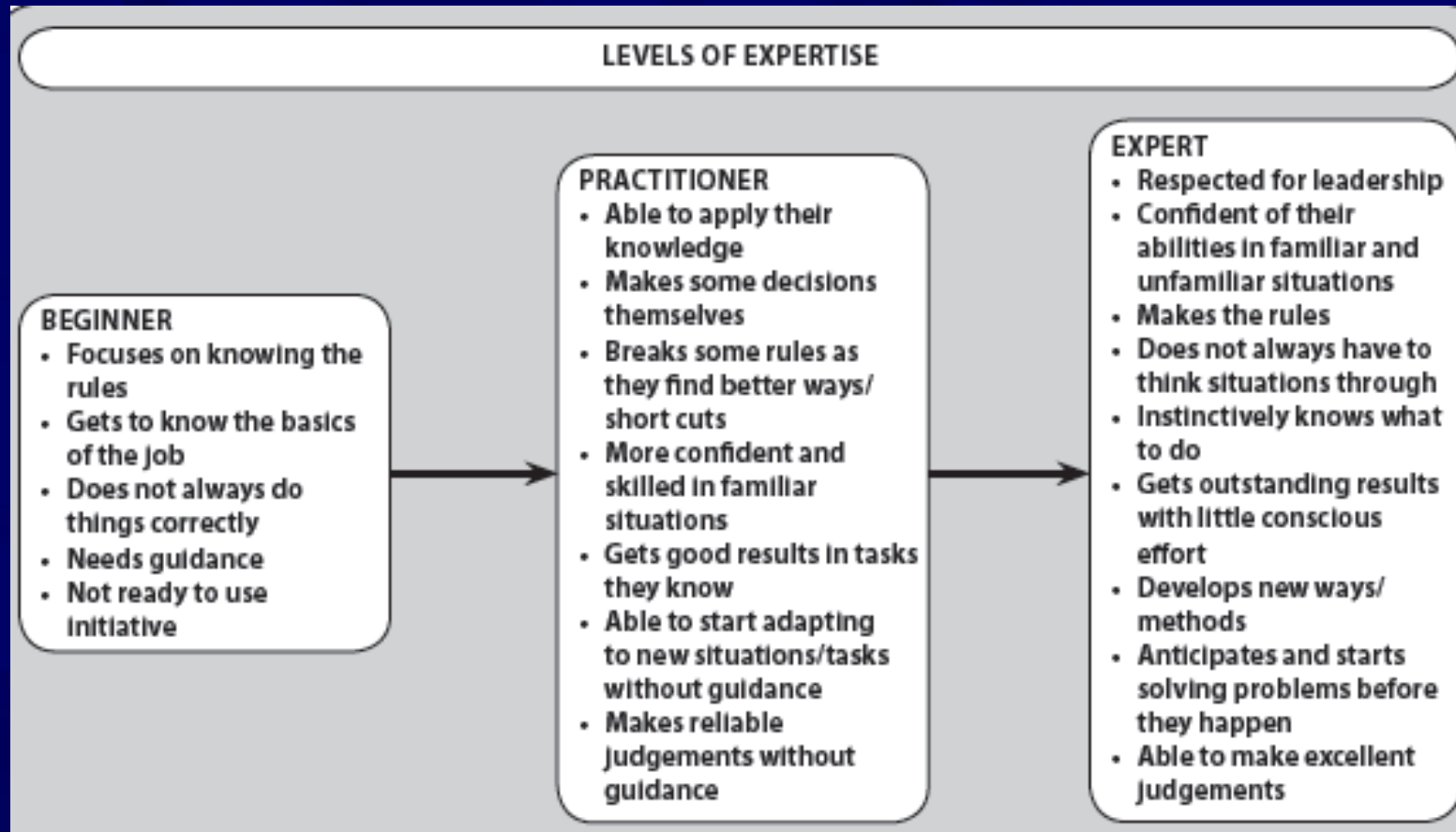
1. Determine expertise and resource needs

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 - identify expertise and resource needs and include required competencies and attributes
 - produce estimates of resource needs
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1.1 Identify expertise and resource needs and include competencies and attributes

- **Project scoping**
 - Define the need
 - Identify key stakeholders
 - Identify project drivers
 - From needs to requirements. Define simple terms.
 - Identify potential problems
- **Resources**
 - BBBEE
 - Reputation of the supplier
 - History
- **Expertise**

Level of expertise



Activity 1

- **Working in small groups of 4-5 people, imagine that you are all the stakeholders that have been called to a scoping meeting. It has been decided that your organisation has grown to the extent where a dedicated receptionist is needed. He/she will need to answer all incoming calls, deal with visitors and do some basic administration work like faxing, updating the client database, etc.**
- **The topics in this scoping meeting that need to be covered are:**
 - **Profile of the person – attitude, expertise, etc.**
 - **Basic responsibilities in terms of the job.**
 - **Equipment needed e.g. computer, desk, etc.**
- **Each person must record the discussions and decisions for inclusion in their portfolio.**



1.2 Produce estimates of resource needs

RESOURCES					
Item	Amount needed	Price	Total	Supplier	Availability
Rolls	300	28c per roll	R84.00	Shopleft	Place order the day before
Viennas	300	R37.99 per 50	R227.94	Pick 'n Go	Immediate
Margarine	1 kg	R10.99 per 500 g	R21.98	Shopleft	Immediate
Serviettes	300	R15.99 per 50	R95.94	Shopleft	Immediate
Tomato sauce	2 bottles	R14.99 per bottle	R29.98	Pick 'n Go	Immediate
Mustard	1 bottle	R16.99	R16.99	Shopleft	Immediate
Sub-total			R476.83		
EXPERTISE					
Job	Number of people needed	Hourly rate	Number of hours	Total	
Cook/assembler	2	R25	4	R200.00	
Salesperson	1	R25	4	R100.00	
Manager	1	R28	5	R140.00	
			Subtotal	R440.00	
			Estimated total	R916.83	

Activity 2

- **Research and prepare a budget for the appointment of the new receptionist. Include all items such as equipment and furniture that your group decided was needed in Activity 1.**
- **You will need to establish the salary range of the person too.**
- **You can use the Internet, media as well as get quotes from companies in order to get the information. Remember to attach all this to the budget as evidence.**
- **This is an individual task.**



1.3 Confirm expertise and resource needs with key persons

- **As a Personal Assistant, it is very unlikely that you will have the authority to make decisions regarding the employment of people or the purchase of equipment.**
- **You may work under time pressures, as decisions can only be made once your research and recommendations have been completed.**
- **Any decisions must be confirmed in writing so that the relevant people can be held accountable.**

Activity 3

- **Outline the processes and documents that exist in your SIM business when a new appointment is made – in this case the receptionist.**
 - **Who needs to be consulted as part of the scoping session?**
 - **Who authorises the recruitment and appointment of the receptionist?**
 - **What details are required? What forms need to be completed?**
 - **Draw up a detailed document authorising the recruitment of the receptionist and have it signed by the relevant manager(s).**



1.4 Set clear, concise criteria for expertise and resources

- **Basic job analysis**
 - What are the job responsibilities of current employees? Will it need to change? If so, how?
 - Conduct Internet research and look at sample job descriptions online or offline, highlighting similar jobs.
 - Do analysis of the work duties, tasks, and responsibilities that need to be accomplished by the employee filling the position.
 - What are the most important outcomes or contributions needed from the position?

Activity 4

- **Working in pairs, develop a suitable job profile or description for the receptionist position that has been proposed for your SIM business.**
- **If you do any research on the Internet or in relevant sections of the newspaper, copies or references should be included in this task.**



2. Establish and record expertise and resources

- *After completing this subject outcome, you will be able to:*
 - **express the choice of expertise and resources for operation and service requirements of the organisation**
 - **document expertise and resources in the required format and within agreed time frames.**

2.1 Express the choice of expertise and resources for operation

- **Supplier relationships**
- **Three quotes**
- **Tenders**
- **Advertising for vacant positions**

Activity 5

- 1. Draw up a scorecard that you can use to screen all the applications that you expect for the position of receptionist in the SIM business.**
- 2. Draw up a scorecard that you would use in the interview process – think carefully of what the job entails but also remember that you cannot discriminate, e.g. against male candidates.**



2.2 Document expertise and resources in the required format and within agreed time frames

Company name				VAT reg no:	
PURCHASE REQUISITION				Date: _____	
Requesting department: _____					
Item #	Qty	Ref #	Description	Purpose	Price/Unit
Deliver to: _____				Required date of delivery _____	
Suggested suppliers: _____				Signed _____ Approved _____	

Activity 6

- **Draft a purchase requisition (use the template as a basis) for the furniture required for the new receptionist – desk, chair and storage cabinet. You can research actual prices but this is not a requirement as you can make up the information. You must ensure, though, that all the relevant information is given and that it has been signed.**
- **Explain who it will be submitted to for authorisation/approval and how long before the receptionist is due to start.**

3. Report on expertise and resources

- *After completing this subject outcome, you will be able to:*
 - select the reporting method, which is appropriate to the context and organisational requirement
 - prepare report, using recorded data
 - submit report within agreed time frames and format.

3.1 Select the reporting method, which is appropriate

- The more expensive the resources or the more important the appointment of a person with the right expertise, the more formal the report will need to be**
- For less important appointments or smaller purchases, an e-mailed recommendation may be sufficient, which is then discussed at a less formal meeting.**

3.2 Prepare report, using recorded data

- **Task**
- **Time frames**
- **Process undertaken**
- **Proposal / recommendation**
- **Proposed suppliers**
- **Recommendatio**

Activity 7

- **Prepare a formal written report for the management team of your SIM business outlining your recommendations in terms of creating a position for a receptionist.**
- **Indicate the task and the time frames, how it was scoped, the research you have done in terms of job profile and salary, the resources that will be needed and the benefits to the company.**



Activity 8

- **Prepare a five-minute presentation, including relevant visuals (can be summarised version of the report with relevant points, budgets, etc. or in the form of a PowerPoint presentation), which will be presented in class.**

