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CHAPTER 8

Meetings and Travel

Business meetings are held for many purposes. Workers often meet to share information or solve problems. Formats for meetings can be informal or formal. Meetings can have many participants or only a few. Employees often travel to attend meetings. Travel arrangements must be made. A schedule for the trip and related documents must be prepared.

In this chapter, you will learn about planning and taking part in meetings. You will also learn about making travel arrangements and about supporting activities related to business travel.

Online Resources

- *The Office* Web site:
Data Files
Vocabulary Flashcards
Sort It Out, Travel
Chapter 8 Supplementary Activity
- American Institute of Parliamentarians
P.O. Box 2173
Wilmington, DE 19889-2173
- Search Terms:
meeting planning
parliamentary procedure
teleconference
travel safety
travel planning

- Plan business meetings
- Prepare documents related to business meetings
- Participate effectively in meetings

Business meetings bring people together to communicate. They may meet to make decisions or solve problems. Because employees work together, many tasks are related. Meetings are an important means of communication. Without meetings, keeping up to date on company matters would be difficult for employees.

Meetings may range from an informal chat in a manager's office to a formal gathering of the board of directors. Although many meetings are held in person, technology allows people in different locations to attend meetings without leaving their offices. Well-organized meetings are necessary for businesses to run smoothly. Your role in assisting with these meetings will vary. It will depend on the degree of formality, purpose, size, and location of the meeting. In this topic, you will learn how to plan and participate in meetings.

Types of Business Meetings

Office workers should understand the differences in the nature of meetings. They should also know their roles in planning and participating in them. The nature of the organization, the duties of the department, and the purpose of the meeting will determine the size and formality of the meeting.

Informal and Small Group Meetings

Many of the meetings in which office workers are involved will be informal discussions and small group meetings. Many times, informal meetings are set up as committee meetings. These meetings address specific topics or ongoing concerns and issues, such as safety and security.

Working with customers or clients may also take the form of small group meetings. These meetings may be more formal than small group meetings with coworkers, especially if the meeting is an initial contact with a client. Follow the steps described in the following sections to plan and conduct a meeting.

This example shows how one office worker carried out her duties for setting up and taking part in a small, informal meeting.

Carla's manager sent her an e-mail as follows: "Carla, see if you can get the other four Pikesville project engineers together tomorrow at three o'clock. We need to meet for about an hour to discuss the status of the Pikesville project. See if the conference room is available." As she read through the message, Carla noted the materials she needed to bring to the meeting. She also noted the arrangements she needed to make for special equipment. Immediately after reading all the instructions, Carla checked to see if the engineers would be free through the company's electronic calendaring system. She noted that all four of the other engineers were free at that time. She added the meeting to their calendars.

Next, Carla checked the conference room schedule. Finding it free at the hour requested, she added her name as the person requesting the meeting and her telephone number as a reference. She sent an e-mail message to each of the engineers. The message noted the time, place, and approximate length of the meeting. It indicated that the meeting had been added to their electronic calendars. She then arranged for the necessary equipment and copied materials for the meeting. To follow up the request, she sent an e-mail message to the manager to confirm the arrangements. She noted the meeting on her own calendar. The next day, Carla checked the conference room before the meeting to see that everything was in order.



Informal, small group meetings are held frequently in businesses.

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Formal Business Meetings

A formal meeting follows a definite order of business. It involves a specific audience and requires some preparation. Many organizations set up formal staff meetings at a specific time each week or month. Other formal business

meetings, such as conferences or quarterly sales meetings, may be planned for longer periods of time. You may be asked to help plan a meeting. You may need to prepare meeting materials and make sure that follow-up actions are noted and carried through.

Multinational Meetings

Many companies conduct meetings in which all participants do not speak the same language. All the people may not be in the same physical location. Multinational meetings for large groups are likely to be very formal. They may require detailed planning and preparation. Time differences for the different locations must be considered.

Knowledge of international and business etiquette is important for these meetings. Your role as a coordinator who arranges the meeting details will be critical. Your role may include working with hotel personnel if the meeting is held away from company offices. You may need to send the meeting plans to the people who will take part in the meeting. You may also work with equipment providers. You may need to know how to use equipment and the proper person to call for help if the equipment does not work properly.

Planning the Meeting

Regardless of the size of the meeting, documents prepared for meetings require organization and planning. Typical documents may include:

- An **agenda**, which lists the topics to be discussed during the meeting
- **Minutes**, which are the written record of the official business of a meeting
- A list of follow-up items or reminders of tasks to do following the meeting

You may have duties before, during, and after a formal meeting. You may need to prepare an agenda before the meeting. At the meeting, you may need to take the minutes. After the meeting, you may need to prepare and distribute the minutes and note the follow-up items from the minutes.

Before the Meeting

The following suggestions will be helpful to you in your planning. You may not use all the suggestions for each meeting. However, these guidelines will be helpful as you plan for most business meetings.

- **Establish a meeting folder.** Once you are aware that a meeting will take place, set up a folder for it. Use this folder to collect items related to the meeting, such as the list of attendees, the agenda, notes, and copies of materials to be distributed. Create an electronic folder on your computer to store documents related to the meeting.
- **Determine a meeting time.** You may be told the time at which a meeting is to take place, or you may have to schedule a time when all needed participants can attend. Contact each person with a couple of suggested meeting times. Ask if one of the times is convenient. This is especially important when the meeting involves clients or others from

agenda: a document that contains the information for a meeting such as the participants and topics to be discussed

minutes: written record of meeting proceedings and decisions

outside your company. If the participants are all from within your organization and use calendaring software, you may be able to simply check each person's calendar for a time when he or she is available.

- **Reserve a meeting room.** When you know the date, time, and location of the meeting, check to see if the desired meeting room and time are available.
- **Arrange for needed equipment.** Many times the purpose of the meeting will determine the kind of equipment that will be needed. Rooms may be equipped with overhead projectors, but electronic projection systems may be required. Special equipment may be needed if the information will be sent to an off-site location.
- **Notify the meeting participants.** Notify people as soon as possible of the time, place, approximate length, and purpose of the meeting. Identify any materials or supporting documents they should bring.
- **Use reminder systems.** Mark your and others' calendars with the meeting time and place. Use a tickler file or other reminder system to help you schedule the details. For example, if you must prepare 20 copies of a report to present at the meeting, create a reminder to do so.
- **Key an agenda.** All participants and the recording secretary should receive a copy of the agenda prior to the meeting. Topics should be stated concisely and listed in the order they will be discussed. The starting time for each agenda item may be listed, along with breaks in the program. Only the starting time for the meeting is listed if the meeting will be brief. The person who will lead the discussion or training for each topic may be listed. Other relevant information, such as meeting rooms or materials required, may also be included. An agenda typically contains many of the items shown in Figure 8-1.1 on page 314.
- **Organize meeting materials.** You may be expected to gather materials. Notepads, pencils, file folders, ID badges, and parking stickers are examples of these items. Also, organize materials and handouts such as reports or letters that will be used at the meeting. Review any material to be presented at the meeting on the equipment that is available in the meeting room.
- **Prepare the meeting room.** The room temperature should be comfortable, and the seating arranged to fit the meeting style. A room arrangement in which all participants can be seen and heard will make discussion easier. Any presentation aids should be positioned so that they are near the leader and can be seen by everyone in the room. Check to be sure that requested equipment is present and working properly.

During the Meeting

The degree to which you participate during the meeting will depend on the purpose of the meeting, where it is held, and the preplanning to be done. You may be responsible for the minutes or for leading part of the discussion.

The minutes describe the action taken by the group. They provide the reader with a concise record of what took place at the meeting. The minutes should not be a word-for-word transcript of the meeting. However, the

recorder must make note of all important information. The minutes must give a clear, accurate, and complete accounting of the happenings of the meeting. Although various reporting formats are acceptable for recording minutes, the following information appears in most of them:

- Name of group, committee, organization, or business holding the meeting
- Time, date, place, and type of meeting (for example, weekly, monthly, annual, called, special)
- Name of presiding officer
- Members present and absent (In a large organization, only the number of members present must be recorded to verify that a **quorum** was present.)
- Reading and approval of the minutes from the previous meeting
- Committee or individual reports (for example, treasurer's report, standing committees, special committees)
- Unfinished business (includes discussion and action taken)
- New business (includes discussion and action taken)
- Time, date, and place of next meeting
- Time of **adjournment**
- Signature of the individual responsible for the minutes

quorum: the minimum number of members that must be present to conduct business at a meeting

adjournment: an ending or closing

The following suggestions will be helpful to you when it is your responsibility to prepare the minutes of a meeting:

1. Bring to the meeting copies of the agenda and the minutes of the previous meeting. Bring also any report or document that might be referred to during the meeting.
2. If you prepare minutes frequently, use a **parliamentary procedures** reference source (such as *Robert's Rules of Order Newly Revised*). This resource will help you better understand the meeting proceedings and the correct terms to use when taking and preparing minutes.
3. Record the important points of discussion. Note the action taken or the conclusion reached.
4. Record the names of the persons making a **motion** or **seconding** a motion. Motions should be recorded word for word. A statement should be made in the minutes as to whether or not the motion was passed.
5. Correct minutes of the previous meeting. Sometimes at the following meeting, corrections must be made to the minutes before they can be approved. If only a few words are affected, lines may be drawn through the incorrect words and the proper insertions made above them. If more than a few words are affected, lines may be drawn through the sentences or paragraphs to be corrected and the changes written on a new page. The page number of each correction should be indicated on the original minutes. The minutes should not be rewritten after they have been read and approved at the meeting.

parliamentary procedures: guides for conducting meetings

motion: a proposal formally made in a meeting

second: indicate formally the support of a motion

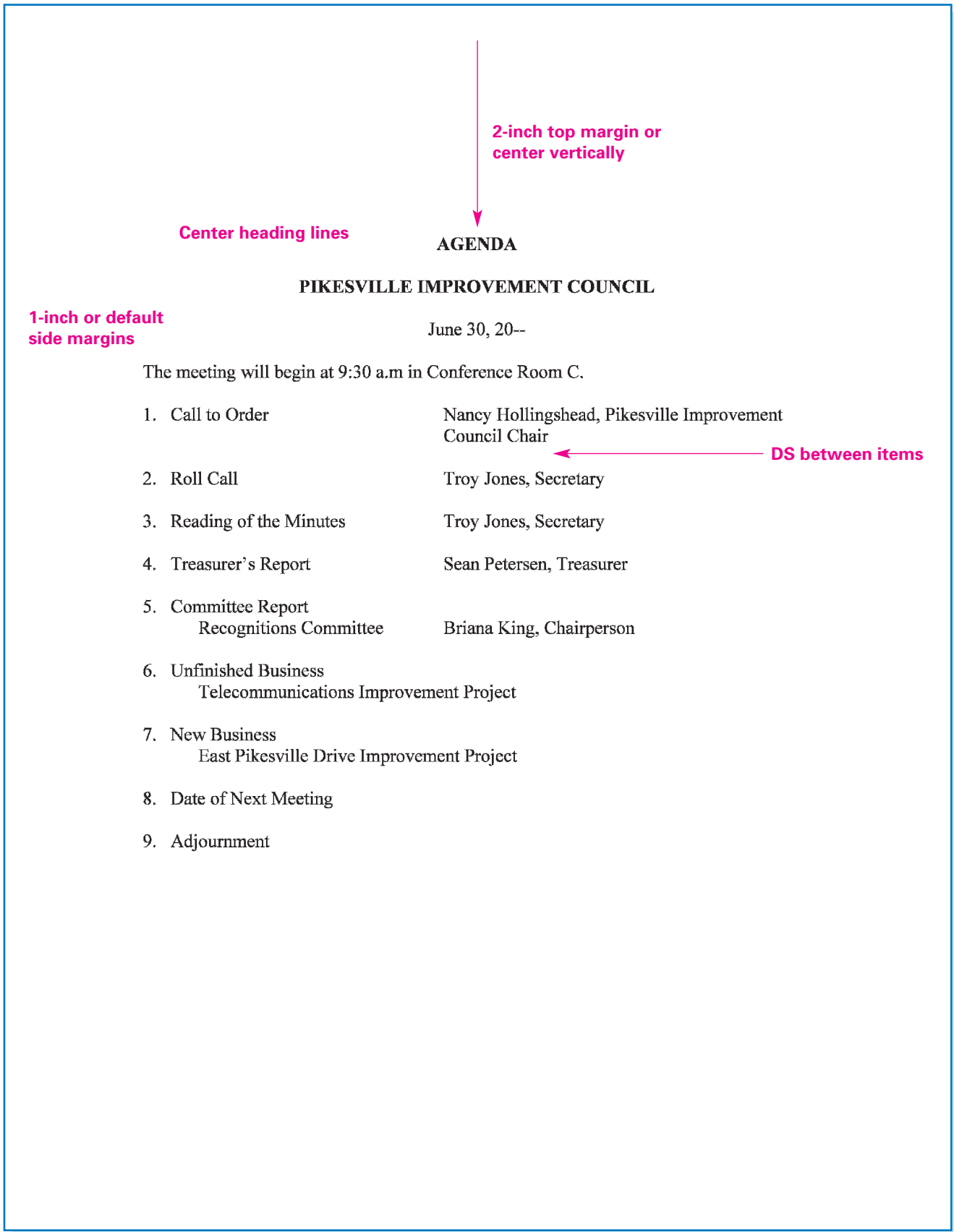


Figure 8-1.1

An agenda is a list of topics to discuss during a meeting.

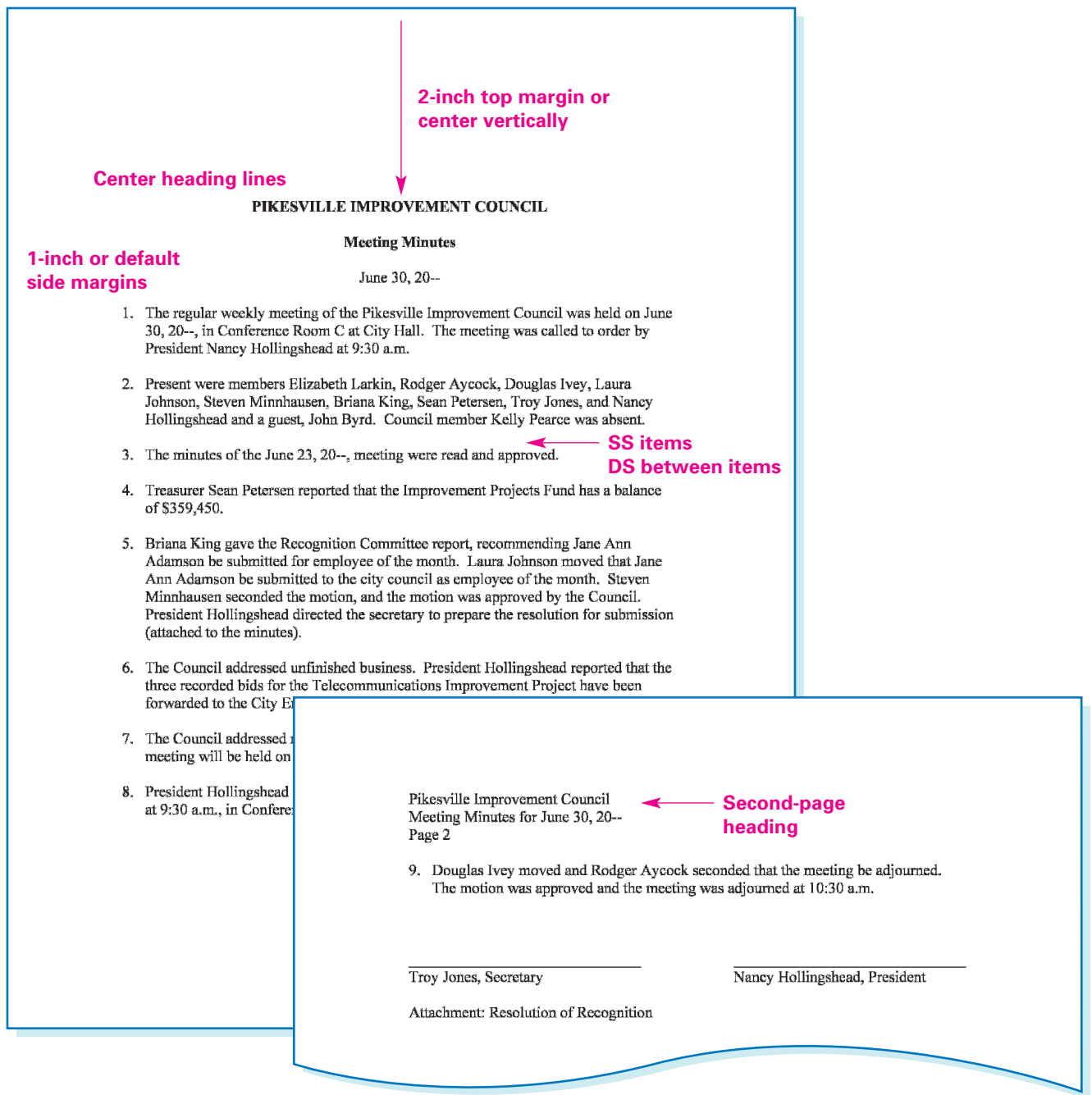


Figure 8-1.2

Minutes are the official record of a meeting.

After the Meeting

Once the meeting is over, you may need to complete follow-up activities. Make calendar or reminder notations for any item from the meeting that will require future attention. Prepare the minutes as soon as possible. Preparing the minutes will be easier when the details of the meeting are fresh in your mind. Use examples of previous minutes for appropriate format or follow the sample shown in Figure 8-1.2. Ask the chairperson of the meeting to review the minutes before they are distributed to be sure there are no omissions or errors.

Complete any correspondence related to the meeting. Write thank-you letters to speakers or resource persons. Items to be added to the agenda for the next meeting also should be noted.

Participating in Meetings

Meetings are an important part of business operations. People need to communicate with one another on a daily basis to complete the work of the organization. As an office worker, you should be prepared to lead or take part in any meeting you attend.

Leading

All employees use leadership skills in their jobs. They meet deadlines, improve how the tasks are done, and work with people to get their jobs done. These same leadership skills are important in meetings. A good meeting leader conducts the meeting in an **assertive** way that accomplishes the goals of the meeting. At the same time, he or she also uses a nonaggressive communication style that makes everyone feel comfortable. Follow the guidelines below to develop a nonaggressive, yet assertive communication style when leading a meeting.

assertive: positive or confident in a persistent way

- Make the objectives of the meeting clear to all participants.
- Be familiar with the background material and have relevant documents at hand.
- Offer suggestions and ask questions during the meeting.
- Always be willing to listen to others' suggestions.
- Keep the meeting on topic and moving toward a solution or a **consensus**.
- Ensure that all participants have an opportunity to take part in the discussion.
- Remain open to new and creative approaches.
- Summarize the decisions or plans that have been made during the meeting.
- Identify clearly the duties or tasks assigned to each group member in following up or completing plans.

consensus: common agreement or mutual understanding

Brainstorming

brainstorm: offer ideas or suggestions

Brainstorming is offering ideas or suggestions in an effort to find a solution to a problem or to create a new approach. The objective is to come up with as many ideas as possible. During the brainstorming process, the following rules are usually observed:

- All ideas are recorded, no matter how unrealistic they may appear.
- Criticism of ideas is not allowed until all ideas have been expressed. Comments such as “that will never work” or “we tried that once already” may block the flow of ideas.
- Explanations and combinations of ideas are encouraged. The value of brainstorming is that one idea may build on another.

To encourage brainstorming, a meeting leader must be willing to give time to the process and encourage everyone to take part.



Brainstorming in a meeting generates ideas.

WORKPLACE CONNECTIONS

The members of the Marketing Department at Bell Industries, a small manufacturing company, travel often to meet with clients and exhibit the company's products at trade shows. Currently, each department member books his or her own travel. Few rules or restrictions related to travel are in place. The department's travel expenses are over budget for the first half of the year. The department manager, Penny Ortiz, has called a meeting of department members to discuss the problem and brainstorm ideas for how to lower travel costs for the remainder of the year.

Penny: "As you are aware, we must take steps to lower our travel costs. Starting today, I will look at each situation more closely than in the past before I approve travel for anyone in our department. Before you request travel, please consider whether you really need to make the trip. For example, can the meeting be held by phone rather than in person? Now, I need suggestions from all of you. Who has an idea on how to lower travel costs?"

Ricardo: "Making airline reservations at least seven days in advance will usually result in lower fares. Because we often know the dates for trade shows months in advance, we could book some flights 30 days in advance. That should save a lot of money. Of course, all air travel should be booked business class or coach—no first class fares. I think we all do that already, though."

Kim: "Do we sometimes fly when driving would be almost as quick? I suggest that for any destination within five hours driving time, we drive rather than fly. Driving is almost always cheaper than flying."

Penny: "Good suggestions, Ricardo and Kim. Anyone else? What do you think, Florence?"

Florence: "Well, I know many companies set maximum amounts for certain expenses. Maybe we could do that also. For example, the maximum for hotel rooms might be \$100 per day. The maximum for food might be \$50 per day. The maximum for entertaining clients might be \$100 per client per day. If we know ahead of time that more funds will be needed, such as for hotels in an expensive area, that expense could be approved ahead of time by Penny."

Ilena: "Speaking of expensive hotels, would anyone want to share a hotel room at trade shows? If you feel comfortable doing so, this would make the travel budget go farther."

Jordan: "What about rental cars? Let's always rent a subcompact or compact car for lower fees and use a car only when it's really necessary."

Penny: "Thanks, everyone. I have recorded all these good ideas. Think about the issue for a couple of days and let me know if you have any more suggestions. I'll create a document containing our new travel guidelines to distribute at our meeting next week."

Group Dynamics

group dynamics: the way people interact and communicate within a group

Group dynamics refers to how people interact and communicate, as in a meeting. Group dynamics can play an important part in reaching group consensus and decisions. The following sections focus on the three critical components of group dynamics.

Interactions

Interactions among group members will depend on the purpose of the meeting. In almost all meetings, communications will be improved when group members can see one another. Eye contact can be used to help gain attention or control a discussion. When all participants can see the leader and the visual aids, they can understand the discussion better. The purpose of the meeting should determine the seating arrangement.

A round table or circle may be used when the leader is seeking a true cooperative form of decision making. This format also reduces the appearance of differences in rank between the participants.

A U-shaped arrangement can be used for larger meetings—those that include 10 or 12 participants. In this arrangement, the leader may sit in the middle of the U to maintain eye contact with everyone. At the same time, all participants can see each other and are less likely to engage in side conversations.

A center table layout, with the leader at one end of the table, allows the leader to control the discussion. In this arrangement, all communication tends to flow toward the head of the table (where the leader is seated).



An appropriate seating arrangement can help accomplish the goal of the meeting.

Exchange of Information

Exchange of information can be improved by the seating arrangement and the willingness of the leader to encourage open communication. Planning by the leader before the meeting can set up the open exchange of information among group members. The leader can:

- Provide in advance materials that will be discussed.
- Arrange the room and seating to meet the needs of the meeting.
- Prepare visual aids that guide the discussion.
- Use an appropriate leadership style.

Relationships

Relationships among the group's members will affect the meeting. A good leader listens, asks questions, accepts criticism, keeps the meeting on topic, and resolves conflicts. Conflicts arise when participants have strong opinions or hidden agendas (their own private objectives). Leaders and participants should follow these guidelines to help develop mutual trust and cooperation in meetings:

- Use neutral language in the discussion
- Avoid placing blame
- Ask open-ended questions
- Use terms that all participants understand or define those that are unfamiliar
- Allow all participants to speak without interruptions
- Maintain a pleasant facial expression
- Be open to new methods and ideas

Involving Everyone

Questions or statements, such as those listed below, may encourage group participation and give each person at the meeting the opportunity to express his or her opinion:

- What do you think about . . . ?
- What approach can we use to solve this problem?
- Jane, what do you think about Jim's idea?
- Ron, we haven't heard your ideas about. . . .
- That's an interesting question, Mary. What would be a good answer?
- Are we ready to make a decision or is there still more discussion?
- Let me summarize what we have discussed so far.

Developing an Action Plan

action plan: a description of tasks to be completed

For many meetings, developing an **action plan** to solve a problem or accomplish tasks is appropriate. A written plan of action can replace the traditional minutes of a meeting. The plan focuses on the actions to be taken after the meeting rather than simply recording the proceedings. An action plan is shown in Figure 8-1.3. The basic information about the meeting that should be included in an action plan is listed below.

- Topic of the meeting, meeting date, the chairperson's name, and the recorder's name
- Specific actions to be taken and the person(s) responsible
- Deadlines for the actions and completion dates
- Key issues discussed and the participants
- The meeting length
- Announcement of the next meeting

To arrive at a plan of action, the meeting leader should be sure that all meeting participants have input into plans and decisions. Everyone should have clear assignments to put the plan into action.

Teleconferences

teleconference: a meeting of people in different locations conducted using telecommunications equipment

A **teleconference** is a meeting of people in different locations connected by a telecommunications system. Teleconferences can be used to deliver training or exchange information. They can be held to solve problems and make decisions, just as face-to-face meetings can.

Types of Teleconferences

The meeting may be an audio conference. People taking part can speak with one another by phone or a Web connection. For a group audio conference, a room can be equipped with microphones and speakers. They are arranged on tables at certain intervals, so that all participants can talk to and hear the others.

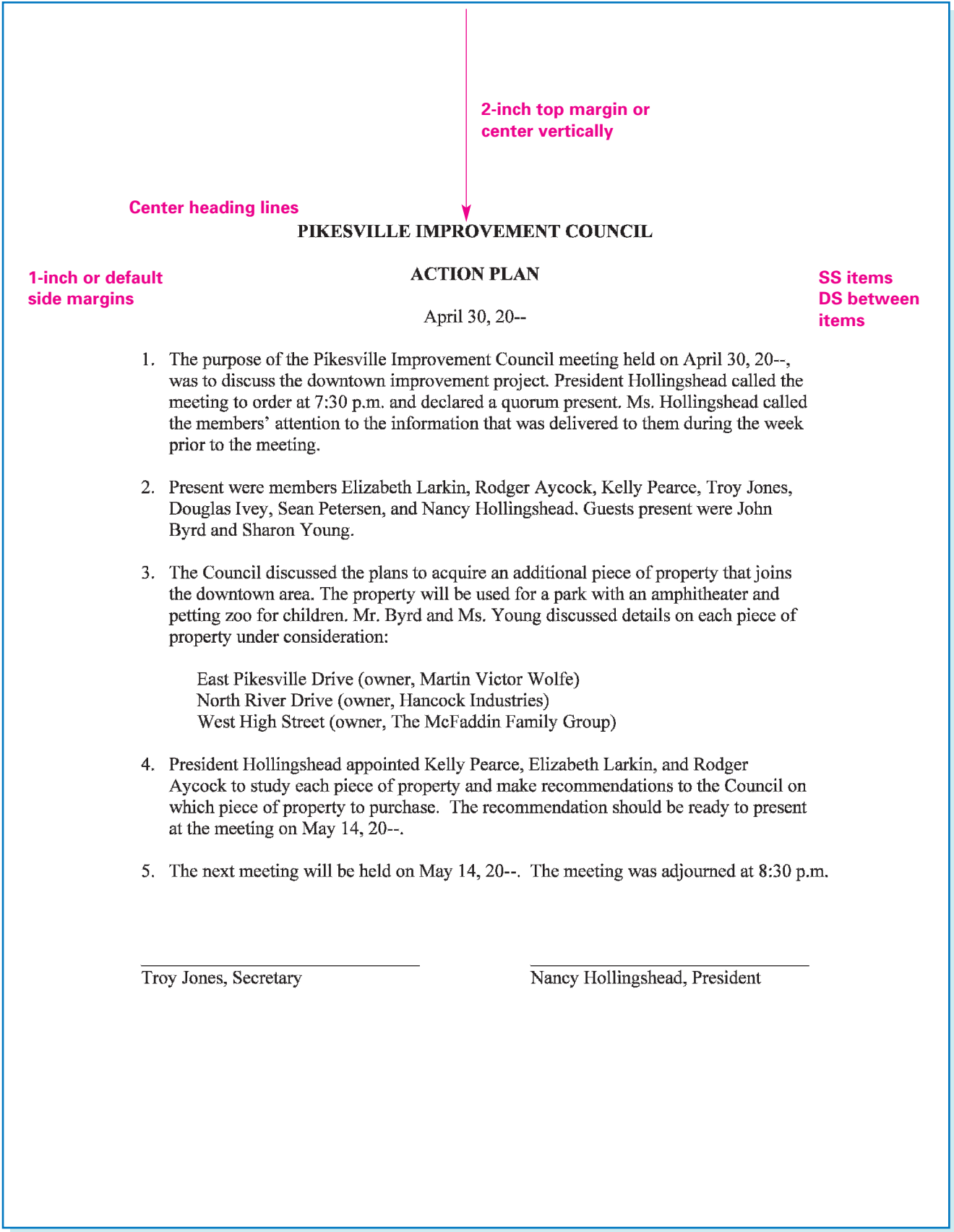


Figure 8-1.3

An action plan focuses on tasks to complete after a meeting.

The meeting may be a video conference. This type of meeting permits people at two or more locations to hear and see each other almost as if they were in the same room. Video conferences can be held using computers equipped with cameras and microphones. A group video conference may be held in a conference room. The room is equipped with cameras, microphones, viewing monitors, and other equipment that allows the participants to see and hear one another.

Computers and electronic tablets may be used to show documents or other graphics being discussed. A speaker at one location can explain material being shown. The graphics appear on the computer screens for the participants.

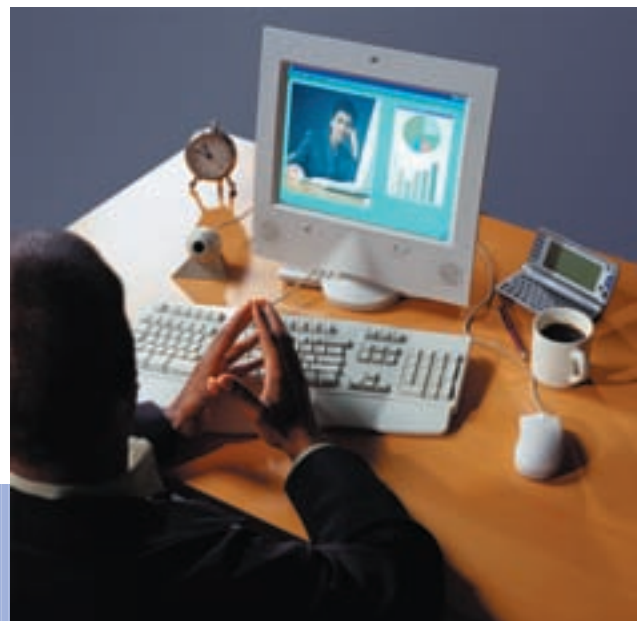
In a computer conference, people communicate using private computer networks or the Internet. The conference may involve only written messages. The messages are keyed and received by the participants in real time. If the users' computers are equipped with microphones and the proper software, the participants can talk with one another rather than keying messages. If the computers also have cameras, the meeting can be a video conference.

WORKPLACE CONNECTIONS

Project team leaders of a South Carolina firm need to meet as often as six times a week to refine ideas and reach decisions on project questions. When the executive assistant is asked to set up a teleconference meeting, he first checks all team leaders' electronic calendars for an open time. He then notifies the leaders of the meeting date and time, lists a call-in telephone number and password, and provides the Web address.

On the day of the meeting, leaders dial the telephone number to be connected to the audio portion of the meeting through their speakerphones. They access a Web site via their computers to see documents. A small digital camera sits on top of each team leader's computer. The team leaders can see each other as they speak or ask questions. The company's executives feel that being able to meet and share information in this way helps them solve problems quickly and be more responsive to market changes.

Teleconferences can be conducted using computers.



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FOCUS ON . . .

Web Conferencing

Web conferencing combines the features of video and computer conferencing. In a Web conference, participants can hear and see each other and share documents. Web conferencing is an effective and cost-saving alternative to many face-to-face meetings.

Some Web conferences may involve only a small number of people. For example, two people may meet to work on an analysis or report. Others may also involve a large number of people. For example, thousands of individuals may meet to see and hear a speaker. The equipment used depends in large part on the purpose of the meeting and the number of participants.

Teleconferencing equipment has become less expensive and easier to operate within the past few years. A small business or home office user might install a video camera and software. The user can be ready to hold a teleconference in minutes.

Teleconferencing programs are available. They provide features such as program sharing, file transfer, and text chat features. *Microsoft® NetMeeting®* conferencing software, which is a part of later versions of the *Microsoft® Windows®* operating system, offers these features in addition to video and audio.

Companies that wish to hold teleconferences may use a teleconference service provider. This type of business specializes in providing teleconferencing service to others. Some companies may choose to develop their own conference system. Special equipment and powerful software are used. Other companies may also choose to make conferencing features part of their Web site or intranet.

Web conferencing provides an effective way for people in different locations to meet and to work cooperatively. At a moment's notice, a business can have its brightest and most productive members working together to solve a problem or brainstorm new ideas.

Preparing for a Teleconference

Technology allows flexibility in planning, preparing for, and taking part in meetings. Teleconferencing can be expensive, so the meeting time should be used wisely. Your role in preparing for a teleconference may include the following responsibilities:

1. Reserve the conference room and necessary equipment, if a special room is to be used.
2. Notify the participants of the date, time, length, and purpose of the meeting. Include a telephone number and the name of a contact to call in the event of technical difficulties.
3. Prepare and distribute any related materials well in advance of the meeting. If several documents are to be sent, use different paper colors to copy different reports. That way, it will be easy to identify reports during the meeting.
4. Prepare and distribute an agenda well in advance of the meeting.
5. The room may be equipped with computers, an electronic tablet, or other systems for sharing documents during the meeting. Be sure these systems are operating properly.
6. If the services of a technician or coordinator are needed, arrange to have that person available or in the room during the conference. Take it on yourself to learn the less complicated details of computer teleconferencing, so that you can expand your skills and knowledge in this area.

Topic Review 8-1



REVIEWING THE TOPIC

1. List three general reasons why meetings are held in business.
2. Give an example of an informal business meeting and of a formal business meeting.
3. List in brief the guidelines you should follow to prepare for a meeting.
4. What information generally appears on a meeting agenda?
5. What information generally appears in minutes of a meeting?
6. What guidelines does a good leader follow during a meeting to use an assertive, but not aggressive style?
7. Describe three types of seating arrangement that may be used for meetings and how each one may affect a meeting.
8. What are the similarities between an action plan and meeting minutes? What are the differences?
9. Describe a Web conference.
10. What preparations need to be made for a teleconference?



THINKING CRITICALLY

Mr. Burris has asked you to take charge of preparations for a meeting with union leaders and company officials on April 2. In addition, he has asked you to sit in during the meeting and take minutes. You know from the agenda that the meeting has been scheduled for his conference room.

1. Key a list of the preparations you may need to make for the conference room.
2. Key a list of questions you have for Mr. Burris regarding the meeting preparations. For example: Will there be breaks for refreshments? If yes, how many and when?
3. What items will you need to take to the meeting with you?
4. Key a list of tasks you may need to do before, during, and after the meeting.

REINFORCING ENGLISH SKILLS



Pronouns are words that serve as substitutes for nouns. Pronouns must agree with their antecedents (nouns for which they stand) in person, number, and gender. Write or key the following sentences, selecting the proper pronouns.

1. The executive (that, who) directed the meeting is an effective business leader.
2. Neither Jack nor Jim thinks that (his, their) itinerary should be changed.
3. The executives said that (them, they), along with a group from another company, would attend the seminar in Paris.
4. Office workers who take the minutes of meetings need a parliamentary procedures resource available to (them, they).
5. The committee has promised to have (its, their) findings ready for review at the departmental meeting next week.
6. The executives traveling on business from that office often use (its, their) company's credit cards.
7. The executive and her associate were uncertain how (she, they) should reschedule the trip.
8. The members of the group attending the meeting wanted (its, their) opinions aired before a final vote was taken.
9. The oval table (that, who) was placed in the meeting room will be there only a short time.
10. Joy and Wendy reviewed the meeting agenda before (it, they) was sent to the participants.



Topic 8-1 : ACTIVITY 1

WORD PROCESSING

Agenda for a Teleconference

You work in Atlanta for Ernest Fogg, director of the Marketing Department. Mr. Fogg is making arrangements for a teleconference with marketing vice presidents located in five different regional offices. The teleconference will originate in Atlanta. Mr. Fogg hands you an edited copy of the agenda for the teleconference. He says, "Please key this agenda in final form. Make the changes I've indicated and list the participants in alphabetic order according to city. Proofread very carefully to ensure that all numbers are correct."





1. Open the PDF file *CH08 Agenda*. This file contains the rough draft agenda.
2. Key the final agenda following Mr. Fogg's oral and written instructions.

COMPOSITION

TEAMWORK

WORD PROCESSING

Topic 8-1 : ACTIVITY 2

Meeting and Action Plan



Work in a group with three or four classmates to apply the meeting and planning skills you learned in this topic.

1. Identify a group chairperson who will lead the meeting and a recorder who will make notes during the meeting.
2. Choose one of the problem scenarios following step 4 as the reason for your group meeting. Discuss the possible causes of the problem and related factors. Consider what you have learned about the topic in previous chapters.
3. Brainstorm ideas for solving the problem. Follow the suggestions in the *Group Dynamics* section of this topic as you participate in the meeting. Your goal is to be an active participant with an assertive, but not aggressive, communication style.
4. Create an action plan detailing the steps your group will take toward solving the problem. Assign one or more people to complete each task and set deadlines for completing the tasks. Key an action plan document using Figure 8-1.3 as a guide. Submit the action plan and the notes your recorder made during the meeting.

Scenario 1

You are employed in a small company that has five other office workers. All the office workers need help in handling office tasks such as keying reports, preparing mailings, and responding to inquiries.

Scenario 2

Your company's petty cash fund does not balance with the fund records. Cash is missing. The same situation has occurred for each of the past three months. The petty cash is kept in a small metal box in the secretary's desk. The desk is locked at night, but it is usually not locked during the day. The secretary's duties often take her away from her desk.

Scenario 3

You work for a small company that uses a local area computer network. Users can connect to the Internet via the LAN. Employees are supposed to follow procedures to log on and log off when using the network. Over the past month, computer viruses have been detected frequently on the company's computer network.

People travel for various business reasons. They may need to supervise company operations or meet with clients or company associates. They may attend conferences related to work. Many companies, both large and small, do business with others from around the world.

Travel arrangements are made according to company policies. Some large firms may have a travel department for this purpose. Others may rely on the services of a travel agency. In smaller firms, however, an office worker or the traveling employee may make the travel arrangements.

Preparing for Business Travel

You may have an opportunity to choose the mode of travel for a business trip. The choice of hotels may also be yours. When such choices are available, you will need to know your personal preferences. When you are making the arrangements for another person, you will need to know that person's preferences.

When you travel on business, you will want to complete your duties or tasks effectively. You should arrive at meetings on time and with the needed supporting materials. Carefully made travel plans are important to the success of a business trip.

A travel folder (or trip file) will help you organize the details of an upcoming trip. Use the folder to collect information as it becomes available. Notes on reservations, tickets, hotels, and meeting confirmations may be placed in the file. The information in the travel folder will help you prepare an **itinerary** and complete company travel documents. It can also serve as a reminder system for tasks related to the trip.

As you plan the trip, set aside time to:

- Schedule meetings to be held during the trip. Shortly before the trip, contact each person with whom you plan to meet to confirm the date, time, and meeting place.
- Organize the names, titles, company names, addresses, and telephone numbers or e-mail addresses of the individuals with whom meetings are scheduled.
- Check for travel safety conditions in the destination area.
- Make reservations for transportation and overnight lodging.
- Prepare an itinerary and gather supporting materials for the trip.

- Use appropriate procedures for planning business travel
- Explain procedures for getting a passport and a visa
- Prepare travel documents, including an itinerary
- Describe the factors involved in travel etiquette and travel safety
- Complete follow-up travel activities

itinerary: a document giving detailed plans for a trip

Commercial Air Travel

Time is money for the busy business traveler. The popularity of air travel reflects this point. Often, the only way to manage a tight schedule is by air travel. An extensive network of airline routes is provided by national, regional, and commuter airlines. Airline schedules are available free of charge at ticket counters in airports, at airline offices in major cities, at large hotels, and from travel agents. Most airlines have Web sites that provide travel details and where tickets can be purchased. Tickets can also be purchased by telephone or in person at airports or ticket offices.

If you use several airlines, you will find the *Official Airline Guide* (OAG) a valuable source of flight information and schedules. Your company may have a copy of this publication for your reference. If not, you can access the OAG online. The online OAG is available as a subscription service. To find the site, enter the name in a search engine or follow the link on *The Office* Web site. You simply enter the departure and arrival cities and the date of travel. The flight number and airline, times, cities, number of stops, and a code that indicates the type of aircraft will be displayed.

You may make flight reservations by calling a travel agent, by calling an airline directly using a toll-free number, or by accessing various Web sites. When you purchase airline tickets online, you may receive an **electronic ticket** or a paper ticket or by mail if time allows. If not, you can pick up the ticket at the airport.

electronic ticket: document and receipt that contain ticket information received in electronic form



Air travel helps busy employees maintain schedules.

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If you use the services of a travel agent, your flight itinerary and an invoice may be received with the airline tickets. Each of these documents serves a specific purpose. The flight itinerary can be checked against your records and used to create the traveler's itinerary. Many travelers attach a copy of the flight itinerary to the overall itinerary for the trip. The invoice is kept to attach to the travel expense report.

Plan to arrive at the airport well ahead of your flight departure time (one to two hours). You will need time for checking in at the airline desk to receive boarding passes, check luggage, and move through security checkpoints. Be sure to have a current photo ID such as a driver's license or passport. When checking bags, verify that the luggage tag attached by the airline attendant has the correct destination code. Wait until you see your bags placed on the conveyor belt before leaving the check-in area. Do not pack money, notebook computers, or other valuable items in checked luggage. Keep these items in a carried bag instead.

Comply with all reasonable requests of security personnel. Be aware that your checked bags or carried bags, as well as your person, may be subject to search. Never leave your bags or other possessions unattended or in the care of a stranger. Never agree to carry a bag or other items from a stranger. Check with the airline for a current list of items that are not allowed in checked or carried bags. For example, knives, lighters, and strike-anywhere matches are generally not allowed in carried bags.

Other Forms of Business Travel

Rental cars and trains provide alternative forms of business travel. You may have occasion to make travel arrangements using one of these forms of transportation.



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Some business trips require the use of a rental car.

For short trips, particularly in a local area, many people prefer to rent cars. A rental car may also be suitable when you fly to a city and have appointments in outlying areas. Be sure to allow ample time to reach your destination. Rental cars are available at most airports and other convenient locations. Rental fees vary in price according to the size of the car, the length of time the car is needed, and the miles driven. Follow your company's guidelines for renting a car. Many rental car companies have Web sites where you may choose and reserve a rental car.

WORKPLACE CONNECTIONS

Joe Park rented a car on his arrival at the Kansas City International Airport. He left the car rental agency at 1 p.m. for a meeting near Kansas City scheduled for 2 p.m., giving himself ample travel time for the half-hour trip. Joe arrived at the office where the meeting was scheduled and introduced himself to the receptionist. "Oh, I'm glad you finally made it. We were concerned that something might have happened to you," the receptionist said. "I don't understand," said Joe. "The meeting is scheduled for 2 p.m. It's only 1:40." "Let's see," said the receptionist. "You traveled from Cincinnati, right? Did you remember that Kansas City is in the Central time zone?" Joe was embarrassed about being late for the meeting and promised himself to check carefully all times, including the time zone, in the future.

Train travel is popular in some sections of the country. Train stations are located in the centers of cities and can provide an alternative to air travel on certain routes. Overnight trains have sleeping and dining rooms on board. Check with a travel agent or look in the yellow pages of your telephone directory for information on the railway lines serving your area.

Amtrak, a company that provides train services in many areas of the United States, provides a Web site where customers may make reservations online. To find the site, enter the company name in a search engine or follow the link on *The Office* Web site.

Hotel/Motel Accommodations

Many business travelers must be away from home overnight and stay in a hotel or motel room. In some cases, you may be allowed to request a particular hotel. In other cases, you may rely on a travel agent or coworker to select the lodging.



Business travelers should choose hotels that are safe and convenient to their travel destinations.

When you make reservations by telephone, use toll-free telephone numbers whenever possible. Write down the names of the persons who make and confirm reservations. Always make a note of the rates you are told. Record the **confirmation number** and repeat it to the reservation agent to make sure it is correct. The confirmation number should be included on the itinerary. A written confirmation from the hotel is helpful. Many hotels have Web sites where reservations may be made. A confirmation number is usually provided. The reservation may also be confirmed by e-mail.

confirmation number: a series of characters (often text and numbers) associated with a reservation

Reservations for hotels can also be made online. At many travel sites, information can be found about hotels in a specific area. Descriptions, prices, and dates available are shown. Many hotels or hotel chains have their own Web sites where reservations can be made.

Itinerary and Supporting Materials

Once the travel plans are set, you should prepare an itinerary. You will need to assemble travel documents and related materials for meetings or appointments. If the plans for the trip change, other arrangements may need to be made. Changes can generally be made at the time you cancel the original plans. Have your confirmation numbers and other details available when you call to change reservations or appointments.

Prepare an Itinerary

An itinerary is a detailed plan of a trip. It serves as a guide for the business traveler. Travel plans, meetings, hotel locations, and reminders or special instructions should be included. When planning a trip, allow enough travel time between meetings to avoid having to rush to make the next appointment.

Ali Strong is away from the office on a trip when an important client, Mr. Jobel, calls. Mr. Jobel plans to be in town on Thursday and requests a meeting with Ali. As Ali's administrative assistant, you know that Ali has been hoping to meet with Mr. Jobel, but he is not scheduled to be back in the office until Friday. You tell Mr. Jobel that Ali is out of the office right now, but you will try to arrange the meeting and call him back. Consulting Ali's detailed itinerary, you find that he is scheduled to meet with Mrs. Bridge at this time, and the itinerary includes a phone number for Mrs. Bridge's office. You hesitate to interrupt Ali's meeting with Mrs. Bridge, but decide to call her office and ask to speak to Mr. Strong. Ali seems annoyed at first when he answers your call but soon thanks you for calling. "Tell Mr. Jobel I can meet with him at any time Thursday," said Ali. "I'll reschedule my other meetings and fly home on Wednesday." You are pleased that preparing a detailed itinerary for Ali's trip has proved to be so useful.

You may need several copies of the itinerary. One hard copy should be carried with you. Another copy can be carried in the baggage. One copy should be left with a contact person at the office. You may want to give one copy to family members. The itinerary should be in an easy-to-read format that gives the day-by-day schedule for the complete trip. An electronic copy can be stored on your notebook computer or PDA and carried with you. If changes in travel plans occur during the trip, the electronic copy can be updated and e-mailed to the office and family members. A sample itinerary is shown in Figure 8-2.1.

Gather Supporting Items

Before the trip, gather the travel documents, supplies, and supporting materials, such as those listed below, that are needed for the trip.

- Itinerary
- Travel tickets
- Travel funds
- Passport, visa, health documents
- Hotel/motel and car rental confirmations
- Maps of cities or states as appropriate
- Directions to offices or other meeting locations
- Speeches, supporting correspondence, reports, or files for each appointment/meeting
- Forms for recording expenses
- Extra notepaper, pens, and business cards
- Equipment, such as a laptop computer, portable phone, or presentation projection system

1-inch or default side margins

2-inch top margin or center on the page

ITINERARY FOR CHARLENE STANFORD		
May 17 to May 19, 20--		
DATE	TIME	ACTIVITY
Wednesday May 17	9:43 a.m.	Leave Hartsfield Atlanta International airport on Delta Flight 17.
	10:50 a.m.	Arrive Dallas/Ft. Worth International Airport. Pick up rental car keys at Sun Rentals counter, confirmation number 388075.
		Hotel reservations at Fairmont Hotel, 1717 W. Akard Street. Phone: 214-555-0102. Confirmation number 7K4995F.
	2:30 p.m.	Meeting with George Thatcher, Vice President of Marketing, Fabric Wholesalers, 1314 Gaston Avenue (Phone: 214-555-0196) to discuss purchase agreement.
	7:00 p.m.	Dinner with staff at hotel to review plans for Apparel Fair.
Thursday May 18	12:02 p.m.	Leave Dallas/Ft. Worth International Airport on Delta Flight 444. Drop rental car keys at Sun Rentals and take shuttle to airport.
	12:55 p.m.	Arrive at Lindbergh Field International Airport and meet Richard Stanley (Phone: 619-555-0152) at baggage claim. Travel to Naples plant with Richard, take tour, and return to hotel.
		Hotel reservations at the Seven Seas Lodge, 411 Hotel Circle South (Phone: 619-555-1300). Confirmation number 4478S84.
Friday May 19	7:55 a.m.	Leave San Diego Lindbergh Field International Airport on Delta Flight 880. Richard will meet me at my hotel at 6:45 a.m. and drive me to the airport.
	3:52 p.m.	Arrive Hartsfield Atlanta International Airport.

Figure 8-2.1

Travel itinerary

If the supporting materials, such as a large number of handouts, will be too heavy or bulky to carry with you, arrange to have them shipped to your hotel or meeting location. Arrange for special packaging for equipment, such as computers and projection panels, to prevent damage to these items while en route. Confirm the safe arrival of supporting materials prior to or immediately on arrival and have a backup plan to follow in case items are lost or damaged. For example, you might carry one set of handouts with you so that copies can be made at your destination if necessary.

Travel Etiquette

U.S. companies of all sizes deal with companies in other countries. This activity is handled differently in each company. Some companies have a special division to deal with their branch offices in other countries. Your behavior as a business traveler reflects on you, your company, and your home area. Proper dress and travel **etiquette** will contribute to a successful business trip.

etiquette: standards for proper behavior

Dress

Remember that you represent your organization when you travel. Your dress will contribute to that most important first impression you make on others. Follow these guidelines for appropriate travel attire:

- Dress appropriately for the type of meeting or function you are attending. Many companies send employees to training sessions in which the attire is less formal than while on the job. If the meeting is to take place at another company's site, the attire may be more formal.



Dressing appropriately for a meeting will contribute to a successful business trip.

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- Dress for travel. Many times, employees need a day to travel to a business destination. Dress in this case will be less formal on the airplane or in a car. When a short plane or car ride is all that is necessary to reach your destination, however, dress more formally to be ready to conduct business on arrival.
- Dress to impress. Consider the persons with whom you will be doing business and the impression you want to leave about your organization. Many companies may permit less formal dress while on the job. However, while on business in another city or country, more formal business dress is expected. Proper dress is especially important when traveling in foreign countries or meeting with persons from a culture different from your own. Be aware of the dress customs for the country in which you will do business and dress accordingly.

WORKPLACE CONNECTIONS

Jagu Patel looked forward to attending a conference at a popular golf resort in Florida. He carefully packed his business suits as well as casual clothes for playing golf and sight-seeing. On Monday morning, Jagu ate breakfast early and arrived on time for the first meeting session. As other people began to enter the room, he noticed that he was the only person wearing a business suit. Jagu quietly left the meeting area and went back to his room. Reviewing the conference agenda booklet again, he found that it did, indeed, indicate that business casual or resort wear would be the appropriate dress for the conference. Jagu was glad that he had packed plenty of casual clothes as he changed outfits and returned to the meeting.

Customs

Proper etiquette plays an important role in conducting business successfully, both in the United States and in foreign countries. The etiquette will vary from country to country. Various print and electronic resources are available to provide in-depth information about business and travel etiquette. For information about a specific country, consult a travel agent or someone who has lived or done business there. Consider the following customs and protocols related to business travel:

- Be on time for appointments. Arrange your schedule to allow time for unexpected delays in travel.
- Take an ample supply of business cards. Business cards are always presented by a caller and serve the purposes of introducing the person who is visiting and providing an easy future reference. Business cards should include your name, your company's name, your position, and your title. Avoid using abbreviations on the card. For international travel, have the same information printed in the local language on the reverse side of the card.

- If and when appropriate, provide a gift that is company associated, such as a pen or sweatshirt with a company logo. Flowers are generally a safe and appreciated gift in almost every country.
- Paying for meals and tipping for clients is generally accepted as the role of the host—the person who set up the meeting.
- The universal business greeting in the United States is the handshake. When you offer your hand or reach out to take another's hand, be sure your grasp is firm but not painful. Make eye contact with the person at the same time.
- Know the body language and gestures that may be offensive or have different meanings in other cultures. The universal form of communication that all people recognize and appreciate is a smile. Use it often to break the ice and ease tense situations that may arise.
- Know how to pronounce the name of the person you are visiting, as well as how to address the person. Use academic or honorary titles when appropriate.
- Taste any food that is offered by the host. Many hosts will proudly present the best delicacy the area has to offer.
- Speak standard English. Avoid using slang terms. This is especially important when meeting with people for whom English is a second language.



A handshake is an accepted business greeting in the United States.

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Documents for Foreign Travel

Two documents are required for foreign travel in most countries: a passport and a visa. Other documents, such as work permits, prescriptions for medicine carried, and health records, may also be needed.

The U.S. government provides a free travel registration service for U.S. citizens who are traveling to a foreign country. The Web site is shown in Figure 8-2.2. The information you provide may help the Department of State assist you in case of an emergency. A link to the U.S. Department of State Web site is on *The Office* Web site.



Figure 8-2.2

The U.S. Department of State Travel Registration page

Source: U.S. Department of State. <https://travelregistration.state.gov/ibrs/> (accessed August 30, 2005).

Passport

A **passport** is an official document granting permission to travel. Issued by the United States Department of State, it states a person's right to protection in the foreign country. A passport is needed for travel in most foreign countries.

To secure a passport, application forms may be obtained from government offices and many travel agencies. Information about how to get a passport is available at the Passports Home page on the U.S. Department of State Web site. The site is shown in Figure 8-2.3 on page 338. You can also look in the white pages telephone directory (under "Government Agencies") to find the passport office nearest you.

The requirements to obtain a passport for the first time are listed on the passport application and on the U.S. Department of State Web site. Processing the application normally takes up to six weeks. You should allow enough lead time to avoid having to delay travel plans. Requesting *Expedited* service and paying an extra fee can speed the process to as little as two weeks. After the passport is received, it should be signed, and the information requested on the inside cover completed. To replace an expired passport, obtain a renewal application. Submit the renewal application well in advance of the expiration date for the current passport to avoid being without a current passport.

passport: official U.S. government document that grants permission to travel outside the United States

Figure 8-2.3

The U.S. Department of State Web site offers guidelines for obtaining a passport.



Source: U.S. Department of State. http://travel.state.gov/passport/passport_1738.html (accessed August 22, 2005).

A passport should be carried or kept in a hotel security box or safe and never be left in a hotel room. Make a photocopy of the identification page so that the passport can be replaced if it is lost. Report the loss of a passport immediately to the nearest passport office. If traveling abroad, report the loss to the United States Embassy.

Visa

visa: a permit granted by a foreign government for a person to enter its country

A **visa** is a permit granted by a foreign government for a person to enter its country. The visa usually appears as a stamped notation in a passport, indicating that the person may enter the country for a certain purpose and for a specific period of time. Be sure to note the effective dates of a visa.

consulate: person appointed by a government to serve its citizens and business interests in another country

Always check to see whether you need a visa for the country in which travel is planned. Contact the **consulate** or **embassy** of the country or a travel agent before leaving the United States. Addresses and telephone numbers of consulates of most foreign countries in the United States can be found online. Search using the term *embassy*. You can also look in the yellow pages of telephone directories in major cities under *Consulates* to find phone numbers. Addresses and telephone numbers for many consulates are provided on the U.S. Department of State Web site. Again, allow lead time to obtain the visa stamp from the appropriate consulate prior to traveling to that country.

embassy: the offices of an ambassador in a foreign country

Health Documents

vaccination: injection given to produce immunity to a disease

When traveling to some countries, certain **vaccinations** may be required to protect against a variety of diseases. A country may require people entering the country to have health tests, such as testing for contagious diseases. A travel agency or the consulate of the country to be visited can supply information about required vaccinations or tests. Records of the vaccinations and tests must be signed by a doctor. They must also be validated by the local or state health officer on a specific form. The form may be obtained from a travel agent, the passport office, the local health department, or some doctors. Even if the country to be visited does not require vaccinations, a traveler should carry a written record of childhood vaccinations and booster shots.

Other health factors should be considered for international travel. Taking medicine for air sickness may make travelers more comfortable on long flights. Prescriptions from a doctor for medicines that must be taken by the traveler can be helpful. Permission to carry medicines that might not be available in the country to be visited may be required. Check with a travel agent or the country's consulate to see what arrangements must be made for these medicines.

Travel Safety

Many airlines, hotels and motels, and travel agencies provide tips for travelers. Follow these safety suggestions as you travel or make travel preparations:

- Access the U.S. Department of State Web site for travel warnings, consular information sheets, and public announcements regarding travel.
- Do not leave your luggage or other items unattended in hotel lobbies or in waiting areas in airports. Unattended luggage may be stolen or have illegal or unsafe items placed in it.
- Keep your passport and travel funds in a safe, secure place.
- Do not display cash or expensive jewelry or other items when traveling.
- Do not agree to carry items in your luggage for another person.
- Use all locking devices on doors and windows in your hotel room.
- Do not leave valuables in your car, and be sure to lock your vehicle.



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Never leave your luggage unattended.

- Be aware of your surroundings, and look around before entering parking lots late at night. Always return to your hotel through the main entrance after dark.
- Protect your credit or bank card and telephone calling card numbers at all times.

Many motels and hotels place safety guidelines on specially printed cards in rooms. Read and follow their guidelines for your personal safety.

Handling Work While Away from the Office

Business travelers may depend on an office assistant to handle routine tasks and messages while away from the office. Before the traveler leaves for a business trip, the office assistant should understand how to deal with routine matters. Plans for handling crisis situations and out-of-the-ordinary situations should also be made.

During the Trip

Answers to the following questions may be helpful to the traveler in keeping work flowing and situations under control during the trip:

- Who will handle crises that may arise while you are out of the office? What kinds of emergencies or crises have occurred in the past that you need to be prepared for?
- Who will be making routine decisions for you while you are out of the office?
- What kinds of messages or documents should be forwarded to you?
- When will you be in touch with the office during the trip?
- What kinds of documents will be forwarded to the office prior to returning to the office?

To keep the office running smoothly, the following suggestions may be helpful to the office assistant:

- Keep an itemized list of incoming mail for the traveler.
- Answer routine mail or e-mail for the traveler if authorized to do so.
- Keep a log of faxes, telephone calls, and office visitors for the traveler.
- If possible, avoid making appointments for the traveler for the first day he or she will be back in the office.
- Keep notes of matters you want to discuss with the traveler on his or her return.

Staying in Touch

Technology makes it easy for travelers to stay in touch with the office or clients. Data can be sent and received using computers, networks, and mobile phones. Some hotels provide fully equipped business centers for travelers. Many hotels offer rooms with special data access phone lines designed for modem use. Airlines provide in-flight telephones and conference rooms in airports. Travelers can often complete tasks such as:

- Send and receive business data by fax
- Access messages (voice or electronic mail)
- Participate in teleconferences
- Access the Internet for travel information
- Transfer travel expense records to an office assistant
- Check availability of products for clients
- Place orders and receive confirmation of orders placed by clients
- Access a company intranet for policy or procedural changes that occur while the traveler is out of the office

Technology will continue to play an important role in how work is handled while workers are traveling on business.



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Today's technology allows travelers to complete work away from the office.

Business Travel Follow-Up Activities

Certain follow-up activities should be completed as soon as possible after a trip. These activities include reporting travel expenses, writing a variety of reports, and writing letters.

Expense Reports

Typically, a company will have a form that employees use to report travel expenses. The expenses listed may include charges for items such as hotel rooms, meals, and car rentals. Other expenses, such as for entertaining

travel expense report: document that lists expenses to be reimbursed such as for hotels and meals

clients, may also be approved expenses. Some travelers may receive travel money in advance from the company. These funds are accounted for on the **travel expense report**. Receipts may be required for travel expenses. Follow company procedures to prepare expense reports. Be sure to obtain the necessary signatures or approvals of the completed forms.

Meeting Reports

Examples of meeting reports include sales summaries, client visit logs, project progress updates, and others that present the results of the business trip. The completed reports may provide a written record of decisions that were made or goals that were set. They may discuss complaints or suggestions from customers or ideas for new products or services. Reports are sent to persons who will be affected by the decisions, goals, complaints, or ideas.

Letters

Thank-you letters may be sent to people with whom you meet during the trip. The need for thank-you letters will depend on the purpose of the travel and business etiquette guidelines.

Other follow-up letters may provide a written record of agreements made during the visit. They may give details that were not available during the meeting or discuss tasks related to the meeting. When writing follow-up letters, remember to use the five Cs of effective communications to evaluate your documents.

REVIEWING THE TOPIC



1. In planning a business trip, what activities should you set aside time to complete?
2. What procedures should you follow in making hotel reservations by phone?
3. What items might be collected in a travel folder?
4. List five important travel safety tips.
5. Identify and describe three common forms of business travel.
6. Where can airline schedules be obtained?
7. What items generally appear in a travel itinerary?
8. Define travel etiquette. List five etiquette tips related to business travel.
9. Where can you obtain forms to apply for a passport? How much time should you allow for processing the passport application?
10. Describe three follow-up activities a traveler may need to complete after returning from a trip.

THINKING CRITICALLY



You are a department manager for Ellis Tools, Inc. An employee in your department has submitted a travel expense form for your approval. Your company pays employees 30 cents per mile for travel in their personal cars. The maximum amounts allowed per day for meals are: breakfast, \$10; lunch, \$15; and dinner, \$25. Employees must submit a receipt for any expense item greater than \$25. The purpose of the business trip should be clearly explained on the form. The form should include the destination, people with whom the employee met, and the purpose of the meeting.

1. Open and print the PDF file *CH08 Expenses* from the data files. This file contains a travel expense form and related receipt.
2. Verify the numbers on the form and note any needed corrections. Circle any other items on the form that are incorrect or require more information.
3. Create a memo form for Ellis Tools, Inc. to include the company name and appropriate memo headings. Write a memo to the employee indicating the changes that should be made to the form and indicate that the form is attached.





REINFORCING MATH SKILLS

Your supervisor has asked you to calculate the estimated cost of an off-site staff meeting. The meeting will take place in a conference room at a local hotel. Forty-three people will attend the meeting.



After making some phone calls and doing some research, you have determined the cost of the following items:

- The cost of renting a conference room is \$900.00 per day.
- The cost of renting a video projector is \$50.00 per day
- The cost of pastries and beverages for the morning break is \$3.50 per person.
- The cost of a catered lunch is \$6.75 per person plus a gratuity equal to 18 percent of the total.
- The cost of beverages for the afternoon break is \$2.00 per person.
- The cost of pens, paper, markers, and flip chart pads is \$75.00.

1. Using the information you collected, calculate the cost of each expense item for the meeting.
2. Calculate the total estimated cost of the meeting.
3. A salesperson at another hotel that you called said that she would beat any deal you get at a local hotel by 10 percent. Calculate the total estimated cost of the meeting if you use this competing hotel.

COMPOSITION

RESEARCH

TEAMWORK

WORD PROCESSING

Topic 8-2 : ACTIVITY 1

Travel Reservations and Itinerary



Your manager, Miss Patti Walker, has sent you some notes for a conference she plans to attend in Orlando, Florida. She asks you to research and make reservations for the trip. You should also key an itinerary for her trip. Work with a classmate to complete this assignment.



1. Open the PDF file *CH08 Conference* from the data files. This file contains an e-mail from your manager with notes about the trip.
2. Using a printed airline guide or an airline Web site, research flights for Miss Walker's trip. You could also telephone airlines for flight information and costs. Miss Walker prefers coach nonstop flights if available. Choose the flights you think are most appropriate, considering the costs and the schedule. Pretend that you have reserved these flights for Miss Walker. Make a note of the flight information for her itinerary or print the information from the Web site if possible.
3. Miss Walker would like to stay at a hotel near the Orange County Convention Center. Use a printed hotel guide or a Web site to find a hotel

near the convention center and to find rooms available and rates. You could also telephone hotel reservations numbers (many are toll free) for information. Choose the room and rates you think are most appropriate. Pretend that you have reserved a room for Miss Walker. Make a note of the information for her itinerary or print the information from the Web site if possible. Use the confirmation number MH2933X2.

4. Miss Walker will need a rental car while she is in Orlando. Use a rental car Web site or call a rental car company to find the costs of a mid-size car. Pretend that you have reserved a car for Miss Walker. Make a note of the information for her itinerary or print the information from the Web site if possible. Use the confirmation number C835LX1.
5. Create an itinerary for Miss Walker. Use the itinerary in Figure 8-2.1 as an example. Attach any reservation information you have printed from Web sites for the airline, hotel, or car rental. If you did not print information, key notes about each reservation and attach the notes to the itinerary.

Topic 8-2 : ACTIVITY 2

Travel Etiquette and Safety Brochure

COMPOSITION
DESKTOP PUBLISHING
INTERNET
RESEARCH
TEAMWORK

Your manager, Antonio Alvarez, has asked your work group to create a brochure about travel etiquette and safety tips for business travelers in your company. Many managers are traveling to U.S. and foreign destinations. The brochure would be helpful to them and their office assistants. Work in a group with two classmates to complete this assignment.



1. Create a list of travel etiquette and safety tips that both domestic and international travelers need to know. Add to the information found in the textbook with information you can find from magazines or from an online search. Use search terms such as *travel etiquette*, *business etiquette*, *travel tips*, or *travel safety tips*.
2. Plan the format for your brochure. Lay out your brochure on paper before you create it on the computer. The answers to the following questions may be helpful to your group:
 - What is the name of your brochure?
 - What are the most important points you should emphasize?
 - What supporting information can you provide?
 - What kind of clip art will you need and what is available to you?
 - What software is available to you to create your brochure?
3. Use word processing or desktop publishing software to complete your brochure. Review the information on desktop publishing in Chapter 4, page 144. Your finished brochure should include bulleted items and clip art or other graphics to enhance the brochure.

CHAPTER REVIEW

8



Summary

In this chapter, you discovered the important role office workers play in planning and conducting meetings. You learned about taking part in meetings, arranging travel, and doing business away from the office. You also learned about travel etiquette and travel safety. Key points in this chapter include:

- Office workers often attend meetings and travel on business. Tasks related to meetings and travel must be completed before, during, and after the event.
- Office workers attend both small and large meetings. The meeting may be formal or informal.
- Office workers may prepare a meeting agenda, minutes, and a list of follow-up or action items.
- Meetings allow workers to discuss problems, exchange information, and make decisions. As an office worker, you should be prepared to lead or take part in any meeting you attend.
- A teleconference is a meeting of people in different locations connected by a telecommunications system. Teleconferences can be used to deliver training, share data, or solve problems.
- Carefully planned travel arrangements are important to the success of a business trip. A travel folder (or trip file) will help you organize the details of an upcoming trip.
- Business trips may involve travel by airplane, train, or car and staying at hotels or motels. Reservations can be made by phone or online at company Web sites.
- An itinerary is a detailed plan of a trip. It includes travel arrangements, appointments, lodging reservations, and reminders or special instructions.
- Travelers should be aware of travel etiquette and safety guidelines. The U.S. Department of State provides travel warnings, consular information sheets, and public messages regarding travel.
- A passport and a visa are required for foreign travel in most countries. Other documents, such as work permits, prescriptions for medicine, and health records may also be needed.
- The office assistant plays a critical role in the office while coworkers travel on business trips. The activities the assistant will handle should be agreed to by both the assistant and the traveler.
- Computers, networks, and mobile phones help travelers stay in touch with the office while away.
- Thank-you notes, travel expense forms, and other documents related to the trip should be completed promptly when the traveler returns from a trip.

Key Terms

action plan
adjournment

agenda

assertive

brainstorm

confirmation number

consensus

consulate

electronic ticket

embassy

etiquette

group dynamics

itinerary

minutes

motion

parliamentary

procedures

passport

quorum

second

teleconference

travel expense report

vaccination

visa

Chapter 8 : ACTIVITY 1

Teleconference on Travel Etiquette and Safety

Your manager has asked your work group to plan a teleconference that will focus on international travel etiquette and safety. She indicates that the teleconference should be planned for three weeks from today. It will be held in the company's interactive teleconference room. Those who will attend the teleconference include office workers in various positions. These workers may travel to new company sites abroad. Office assistants who will help make travel arrangements will also attend. Work with two classmates to complete this assignment.

1. Decide on the date and time for the teleconference. Key a paragraph or list describing the procedures and information you would use to prepare before the meeting.
2. Choose a city and country where the company has the new branch office. Obtain the address of the U.S. consulate for the country you have chosen. You can find this information by completing an online search. For example, if the country you have chosen is Japan, you might search using the term *U.S. consulate Japan*. Write a letter to the consulate asking for information about traveling and doing business in the country.
3. Because it may take some time for your request to the consulate to be processed, also search for information from other sources. Complete an online search for customs, business etiquette, and travel safety tips for the country you have chosen. Revise the brochure on travel etiquette and safety you created earlier to include customs and etiquette guidelines and safety tips for a traveler to that country.

COMPOSITION

DESKTOP PUBLISHING

TEAMWORK

WORD PROCESSING



4. Research the travel documents needed to travel in that country. Key a list and description of travel documents a traveler needs for the country. Obtain samples of or applications for the documents if possible.
5. Plan the topics to be discussed during the teleconference based on the information you have collected. Key an agenda for the meeting. Review the contents and format of an agenda in Figure 8-1.1.
6. Submit the following items to your instructor:
 - List describing the meeting preparations
 - Letter you have written to the consulate
 - Revised brochure describing customs, etiquette guidelines, and travel tips
 - Samples or applications for travel documents
 - Teleconference agenda

COMPOSITION

INTERNET

RESEARCH

WORD PROCESSING

Chapter 8 : ACTIVITY 2

International Travel Arrangements



You are one of the office workers who attended the teleconference on international travel etiquette and safety described in Chapter 8 Activity 1. You need to make travel arrangements for a trip next month to the company's new branch office.

1. You will travel from your home city to the city and country your group chose for the company's new branch office in Activity 1. Your travel date to that city is one month from today. Your return travel date is one week later.
2. Using a printed airline guide or an airline Web site, research airline flights to that city. You could also telephone airlines for flight information and costs. (If you chose a small city for the company branch office, you may need to fly to a larger city that is nearby.) Choose the flights you think are most appropriate, considering the costs and the schedule. Pretend that you have reserved these flights. Make a note of the flight information for your itinerary or print the information from the Web site if possible.
3. Use a printed hotel guide or search the Web to find a hotel in that city. You could also telephone hotel reservations numbers (many are toll free) for information. Choose the room and rates you think are most appropriate. Pretend that you have reserved a room. Make a note of the information for your itinerary or print the information from the Web site if possible. Use the confirmation number VI379XA.
4. A company representative, Ms. Kitty How, will meet you at the airport and provide transportation during your stay. She will take you to the airport for your return flight.

5. Create an itinerary for your trip to include travel details and the scheduled activities shown below. See Figure 8-2.1 for an example itinerary. Attach any reservation information you have printed from Web sites for the airline and hotel. If you did not print information, key notes about each reservation and attach the notes to the itinerary.

Day 1	Travel to destination city
Day 2	9:30 a.m. – 11:30 a.m. Tour of new office 12 noon – 2 p.m. Lunch with branch manager, Mr. Lou 2:30 p.m. – 4:30 p.m. Prepare meeting room and materials
Days 3, 4, and 5	9:30 a.m. – 4:30 p.m. Provide training to employees at the branch office (one-hour lunch break starting around noon)
Day 6	9:30 a.m. – 11:30 a.m. Meeting with department managers to discuss additional training needs
Day 7	Travel to home city