

# DACUM Research Chart for Administrative Assistant

## DACUM Panel

Michael Costello  
Contract Worker  
Detroit, MI

Larisa Greenhill  
Medical Secretary/Office  
Associate  
Columbus, OH

Pamela S. Johnston  
Contract Worker  
Hilliard, OH

Bonnie M. Wimmer  
Administrative Assistant/Account  
Clerk  
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## DACUM Facilitators

Connie King  
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Tiffany Dorsey-White  
Tina Overtoom, Team Leader

Produced for

# Kelly Services

Developed by



**February 12-13, 2004**

# DACUM Research Chart for Administrative Assistant

Duties		← Tasks →				
<b>A</b>	<b>Manage Daily Work</b>	A-1 Check phone & e-mail messages	A-2 Check in-box & calendar	A-3 Process incoming mail	A-4 Consult with supervisor	A-5 Prioritize tasks
<b>B</b>	<b>Prepare Records &amp; Documents</b>	B-1 Prepare reports	B-2 Prepare proposals	B-3 Prepare memos	B-4 Prepare letters	B-5 Prepare contracts
		B-13 Prepare expense & mileage reports	B-14 Prepare forecasting reports	B-15 Prepare payrolls	B-16 Prepare facility reports	B-17 Prepare PowerPoint presentations
<b>C</b>	<b>Organize Meetings</b>	C-1 Set meeting date	C-2 Confirm meeting attendees	C-3 Reserve meeting venue	C-4 Prepare meeting invitations	C-5 Prepare meeting agenda
		C-13 Monitor meeting progression				
<b>D</b>	<b>Maintain Office Supplies &amp; Equipment</b>	D-1 Inventory equipment & supplies	D-2 Determine vendors	D-3 Determine staff equipment & supply needs	D-4 Order office supplies & equipment	D-5 Audit supply orders upon receipt
<b>E</b>	<b>Maintain Records &amp; Documentation</b>	E-1 Set up paper filing system (e.g., secured & unsecured)	E-2 Set up electronic filing system (e.g., shared & protected)	E-3 Develop paper file tracking system	E-4 Set up file archival system procedures	E-5 Maintain files (e.g., paper & electronic)
<b>F</b>	<b>Participate in Professional Development</b>	F-1 Determine educational needs for career path	F-2 Participate in continuing education (e.g., college courses, CEU credits)	F-3 Participate in professional organizations	F-4 Participate in conferences, seminars, & workshops	

A-6 Update calendars (e.g., personal, manager, staff)	A-7 Delegate tasks (e.g., subordinates, other departments)	A-8 Respond to inquiries & requests (e.g., e-mail, phone, fax)	A-9 Process outgoing mail			
B-6 Prepare invoices	B-7 Prepare newsletters	B-8 Prepare business plans	B-9 Prepare spreadsheets	B-10 Prepare financial analysis	B-11 Prepare charts	B-12 Prepare graphs
B-18 Prepare transparencies	B-19 Create Visio flow charts					
C-6 Make travel arrangements	C-7 Arrange for speakers	C-8 Arrange for AV equipment	C-9 Arrange meeting food/ refreshments	C-10 Set up meeting conference call	C-11 Prepare meeting presentation	C-12 Set up meeting room & equipment
D-6 Perform minor equipment maintenance (e.g., paper, toner)		D-7 Troubleshoot equipment breakdown(s)	D-8 Arrange for service of office equipment			
E-6 Track paper files in use	E-7 Update records & logs (e.g., petty cash, requisitions, travel)		E-8 Update policies & procedures manual(s)			
F-5 Participate in in-house training (e.g., networking, team building, cross-training)		F-6 Pursue certifications & licenses	F-7 Participate in volunteer activities	F-8 Participate in committee work	F-9 Read professional publications	

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## General Knowledge and Skills

Ability to supervise  
Knowledge of standard operating procedures  
Knowledge of updated computer software:  
Presentation: Power Point, Harvard Graphics, Open Office.org  
E-mail: Outlook, Lotus Notes  
Word Processing: MS Word, WP  
Spreadsheet: Excel, Word, Access, DBII  
Ethics  
Safety: Ergonomic  
Escape Route  
Emergency Procedures  
OSHA  
Equipment safety  
Computer literate  
Internet skills  
Communication skills: speaking, writing  
Telephone skills  
Interpersonal Skills  
Keyboarding skills

## Tools, Equipment, Supplies and Materials

Computer  
Desk  
Chair  
General office supplies  
Telephone  
Fax machine  
Printer  
Copier  
Office space  
Filing cabinets  
Computer software  
Paper shredder  
Coffee pot

## Worker Behaviors

Professional	Self-motivated
Organized	Pride in what you do
Open-minded	Ability to work with others
Follow-through	Collaborative
Ethical	Honest
Maintain confidentiality	Assertive
Tactful	Articulate
Team player	Flexible
Creative	Ability to delegate tasks
Supportive	Customer-service oriented
Detail-oriented	Task oriented adaptable
Common sense	Positive attitude
Impartial	Versatility

## Future Trends and Concerns

Downsizing  
Globalization  
Outsourcing  
Automation  
More required education  
Need to stay current with changing technology  
Pay is decreasing  
Benefits  
Career path  
Increased job responsibility  
Changing job description  
Increased politics  
Need to network  
More specialized skills  
Increased work volumes  
Company-specific skill sets  
Retirement package