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SOME BASIC TECHNIQUES OF SUCCESSFUL MANAGEMENT
IN THE SMALL OFFICE

THESIS

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SOME BASIC TECHNIQUES OF SUCCESSFUL MANAGEMENT
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CHAPTER I

INTRODUCTION

Statement of the Problem

The problem undertaken is a study of certain basic techniques of office management as they apply to the efficient supervision of a small office. The study deals with such fundamental functions of management as the selection and guidance of office personnel, the handling of correspondence and transcription, the manipulation of office files, and the choice of equipment and supplies within the range of a limited budget. It is a survey of existing office practices.

Definition of Terms

The expression "basic techniques" is used to cover those manipulations by the office manager, based on his inherent ability, training, and experience, which bring about the efficient performance of the office under his supervision according to accepted standards of managerial procedure.

The term "small office" is used to cover offices with an employment of from three to twenty-four persons. Such

an office is here considered as dealing with all items of record and correspondence except those requiring the highly trained services of experts, such as accountants and advertising personnel.

Purpose of the Study

It is the purpose of this study to point out certain basic techniques, the mastery of which leads to success in the efficient supervision of the average small office. The study is undertaken with the intention of showing to what extent well-trained personnel, the efficient handling of correspondence, the selection of a suitable filing system, and the proper usage of machines and appliances and other equipment can aid the young office worker to be successful in the field of office management. It is undertaken with the hope that the writer may acquaint the student of business administration with problems as they exist in the small local office in a typical community.

Importance of the Study

The importance of this study lies in the fact that the writer endeavors to make its findings a medium of service to those office supervisors whose duties are too involved to be merely secretarial and whose positions are too modest to be comparable to those usually considered in works on office management. It is felt that if the

young worker understands which techniques of attitude, training, and administration he must have under perfect control, he will endeavor to acquire those skills. The importance of the study may thus be said to be in ratio to the wisdom of the advice it offers to ambitious students in the field of office management.

Limitations of the Field

The field of this study is limited to the management of the office of an average small American business concern. The discussion is further limited to four phases of office management which are of basic importance in the acquirement of an efficient supervisory technique. These phases require mastery of techniques in the fields of office personnel, the making of outside contacts by means of correspondence, the keeping of records in files, and the mechanical operation and structure of the office.

Sources of Material

The materials used in this study include books on the subject of office management, bulletins from governmental and educational agencies, pamphlets issued in an advisory capacity by business organizations, and periodicals on topics of interest in this field. These data are supplemented to a modest extent by the personal experience of the writer, who is employed as a manager of a small office,

in which capacity he has had the privilege to observe the work and to seek the advice of successful men of wide experience in the field of office management.

Procedure

A vital part of the procedure followed in this study consisted of mailing a questionnaire to the office managers of twenty firms in the vicinity in which the writer lives and tabulating the results of these questionnaires as indicative of the actual practices of small offices. In order to make the answers representative of various types of offices, the office managers for the following kinds of businesses were contacted: the credit department of a local newspaper; the adjustment department of a large department store; a bank; the general office of a wholesale grocer; the receiving and billing office of a hospital; a church office; an advertising company; a life insurance company; the auditing department of the local board of education; the office of the United States censor; a government auditing office; the office of a storage and transfer company; the office of translation in Spanish, United States government; a mercantile company; a wholesale grain business; and an army instruction office, aviation corps.

The questionnaire which was sent to the office managers consisted of five brief sets of questions, dealing

with the techniques of management for the most part. The first set, however, was purely descriptive, asking questions about the size, type, and functions of the office under question. A final question in this set was a request to evaluate each of the techniques involved in the study. This chapter closes with a tabulation of the types of offices and an analysis of the answers given in the response to the questions in the first set. Each chapter following, in like manner, contains a discussion of its share of the questionnaire.

The first technique studied in this paper is that of office personnel. A brief survey is made of the traits and training a manager must develop personally if he wishes to succeed in a supervisory capacity. This discussion is followed by an exposition of the qualities he must seek in those he employs in his office. The last topic considered under the treatment of personnel is that of satisfactory adjustments in working conditions, such as salary, schedule and promotions. This is followed by an analysis of the part of the questionnaire pertinent to personnel.

The second topic for discussion is that of correspondence and transcription. Because the effective handling of correspondence is the most valuable function of

the average office, this topic is discussed in detail. The types and structure of the business letter, the questions of reports and manuals, and the problems of mailing procedure are handled as items of secretarial efficiency. An analysis of the questions on secretarial procedures closes this chapter.

Chapter III is a brief survey of several types of filing systems. The survey is followed by recommendations as to the most suitable type for the small office. Problems involving the use of the system by the entire concern are treated in this chapter, followed by a discussion of the section of the questionnaire dealing with filing.

The final chapter deals with the physical structure of the office. It recommends the necessary machines and appliances, suggests effective inter-office communications, and deals with the selection and issuance of supplies. The chapter closes with a short discussion of questions involved in the management of the office budget, and of the part of the questionnaire bearing on equipment.

The summary is a brief capitulation of the main factors discussed in the study of each basic technique of office management. Since this is a status study, there is no attempt to criticize the present set up of any office; the aim of the summary is rather to acquaint

the prospective manager in brief form with a capitulation of the policies and problems which face men now employed in the successful management of a functioning office.

Analysis of Questions in Set 1

Table 1 describes the firms contacted by the writer by means of the questionnaire used in connection with this study and gives some idea as to the range in size and type of offices and the kind of business represented by each.

TABLE 1
SIZE AND TYPES OF BUSINESSES STUDIED

Type of Office General or Special	Number of Employees	Recognized Manager	Kind of Business
1. General	20	Yes	Storage and Transfer
2. General	6	Yes	Church
3. General	15	Yes	Personal Office
4. General	12	Yes	Postmaster Adjustment De- partment-- Dry Goods
5. Special	20	Yes	U. S. Censor- ship Office
6. Special	15	Yes	Bank
7. Special	3	Yes	Tax Auditor
8. General	10	Yes	Real Estate Loans
9. General	19	Yes	Credit Depart- ment--City News- paper

TABLE 1--Continued

Type of Office General or Special	Number of Employees	Recognized Manager	Kind of Business
10. General	12	Yes	U. S. Army Avia- tion Instruction
11. General	22	Yes	Office of Transla- tion Spanish
12. General	20	Yes	Wholesale Grocery
13. General	16	Yes	Billing and Re- ceiving--Hospital
14. Special	3	Owner Only	Advertising
15. Special	18	Yes	Auditing Office City Schools
16. General	5	Yes	Life Insurance Company
17. General	3	Yes	Typewriter Sales and Service
18. General	12	Yes	Mercantile
19. General	3	Yes	Auditing Company
20. General	3	Yes	Wholesale Grain Company

The request to evaluate numerically those features of office efficiency that are the techniques of this study brought the results which are given in Table 2 on the following page.

An analysis of the ratings given the four techniques as a means of maintaining office efficiency reveals two things very definitely; first, that the majority of managers rate cooperative personnel over any other factor as

TABLE 2
EVALUATION OF FOUR TECHNIQUES
BY OFFICE MANAGERS

Rating	Cooperative Personnel	Workable Filing System	Good Secretarial Staff	Enjoyable Convenient Surroundings
First Place	11	2	5	2
Second Place	4	6	8	2
Third Place	3	7	6	4
Fourth Place	1	3	2	14

an office necessity; and, second, that a majority feel that the handicap of uncomfortable surroundings is the one most easily overcome. The cases in which surroundings won first place were those of the city postmaster and the manager of the wholesale grocery, whose office is a barn-like shed along a railroad siding. He might well attribute any office troubles to surroundings, so great is his obstacle in that line. In the cases of first place being given filing systems, the work was of a nature to be dependent upon it for functioning at all, namely the receiving department of the hospital and the adjustment department

of the retail store. The secretary received votes for first place in maintaining efficiency in offices where there is a close personal relation between employer and secretary--where she is practically a private secretary, as in the case of the government flying instructor, the advertising executive, and the managers of governmental offices.

On the whole it is fair to assume that the managers of small offices in the vicinity in which this questionnaire was circulated considered the selection of a cooperative personnel the first technique to be mastered by an ambitious manager; the choice of a good secretarial staff to be his second duty; and the choice and maintenance of adequate files and pleasant surroundings to rank third and fourth respectively in the list of techniques which he must acquire. There are, of course, exceptions, according to the nature of the work done by the various companies.

CHAPTER II

THE PERSONNEL OF THE OFFICE

The Function of Management in the Small Office

The function of management is defined as "the control, supervision, and operation of business activities so that the use of materials, men and equipment results in the efficient achievement of a desired or planned objective."¹

The function of the office is to act as a focal point for co-ordinating a wide variety of activities of production, distribution, and facilitation.² From these two broader definitions the function of management in the small office may be arrived at as the control, supervision, and operation of a limited number of coordinated business activities, usually of a clerical nature, so that the use of men, materials and equipment results in the efficient achievement of a desired or planned objective.

The Manager

Personality.--When a young person is placed in charge of an office, he is faced with the problem of dealing with

¹John J. W. Neuner and Benjamin R. Haynes, Office Management and Practices, p. 4.

²Ibid., p. 15.

three groups of business associates, his superiors, his subordinates and the people who do business with the company he represents. To deal with these people successfully he must possess or acquire certain personality traits. Niles and Niles say that one who wishes to be a successful supervisor must do four things:

. . . he should possess or acquire a sympathy with and an understanding of persons as individual personalities; a knowledge of how mental and emotional processes function, both in individuals and in groups; an actual or potential ability to get on with people; and finally, action patterns which translate his inner feelings and knowledge into effective action.³

Neuner and Haynes describe the successful office manager as one who possesses "an attitude, a personality that makes the supervisor a leader rather than a boss."⁴ On the whole it might be said that the qualities and capacities of personality which make a man a leader elsewhere make him an admirable leader in the management of an office. He must be honest in all his statements and actions, being especially careful to make no promises to others of the office force which he cannot carry out. He must be able definitely to delegate and to assume responsibility; he must be able to plan ahead; he must maintain

³Henry E. Niles and Mary Cushing Howard Niles, The Office Supervisor, p. 55.

⁴Neuner and Haynes, op. cit., p. 233.

plenty of energy, good health, and good humor; he must be able to see his job and the functions of his group in focus as a part of a whole organization.

Training for Management.--The young office manager may have received his training through either of two methods: first, he may have had the advantage of a sound course of college training in business administration; second, he may have received an adequate secretarial course from a good business college and supplemented it by college courses in night school or by correspondence. Whichever his basic academic training may have been, the average office manager has supplemented it by actual successful experience in office practices. This is rendered a necessity by the practice of most large companies in promoting their own employees to supervisory positions when such become available.⁵ When a vacancy in the managerial staff of an office is anticipated, the prevalent plan among business concerns, especially those too small to operate a training school for employees, is to have an executive of the concern train a promising employee for the coming managerial position. A second plan is for the company to arrange for the prospective manager's enrollment in suitable courses at a local college.⁶

⁵Lee Galloway, Office Management: Its Principles and Practice, p. 453.

⁶Edward A. Duddy, L. E. Frailey, and Raymond V. Credit, Business Correspondence and Office Management, pp. 22-23.

Regardless of the method in which a young person is prepared for managerial responsibilities, he must be taught to assume the problems of his new position if he is to be successful in it. He must study the responsibilities of the new office so as to: (1) understand the duties involved; (2) coordinate and plan the activities of the office; (3) locate neglected duties; (4) locate points of previous over-emphasis; (5) find whether he is handling his job properly in the eyes of his superiors; (6) learn if the maximum of advantage is being derived from men and equipment; and (7) distinguish between duties which he can and cannot delegate to others.

He must learn definitely either through academic training or experience a certain number of basic facts about the company for which he works regarding their policies and the application of them to his special department. He must also know the rules and regulations of the company by which he is employed. He must be told the limits of his authority. It is of added value to him if he understands human relations and has been trained in employment psychology. The Erie Railroad simplifies the teaching of its office supervisors to three steps. They must know (1) how to teach a man how to do a job; (2) how to handle questions, objections or grievances; and (3) how

to encourage and maintain enthusiasm.⁷

Duties of the Office Manager.--The duties of the office manager have been summed up as the cooperation of the human element within the office and the coordination of the mechanical element that carries out the functions of the human element.⁸ The duties of the office manager in a small office cover a broad field, for he has charge of personnel and planning functions, as well as the responsibility for actual clerical duties. In general, however, his duties might be said to include supervision of the following problems:

1. Correspondence
 - a. Dictation
 - b. Transcription
2. Other methods of communication
3. Filing
4. Use and maintenance of office machinery and equipment
5. Procurement and control of office supplies
6. Selection and management of office personnel
7. Arrangement and use of office space
8. Control of office activities and problems

⁷"Erie Teaches Supervisors to Teach," Railway Age, (January 16, 1943), pp. 199-201.

⁸Neuner and Haynes, op. cit., p. 16.

Ability to Read Business Trends.--It has been said of managerial trends in business today that, "The hunch isn't played; rationalization seems to be the order of the day. . . . A successful manager has little time for pure intellectual exercise--you can't talk things done."⁹ He must be alert to changing conditions in the business world which cause a slack in certain occupations and a speed-up in others and make his office adjustments harmonize with general conditions. He must stay aware of equipment which would heighten the efficiency of his small sphere in the business world. He must make contacts within and away from his firm by which he can judge whether his office is keeping step with industrial progress.

The Office Force

The first problem which confronts the manager of a new office is that of assembling his force of office workers. When he has acquired a personnel that is wisely chosen, well-trained, intelligent, and imbued with a fine morale, he has successfully mastered the first technique of office management. It is especially necessary that the manager of the small office choose his subordinates carefully, for he has little opportunity to readjust a misfit

⁹"Six Managers," Editorial in Fortune, Vol. XXII, (August, 1940), pp. 54-55; 92-96.

later by transfer to another department. Where an employment office is maintained by the company, the office manager does not often have the responsibility for the selection of those who work under him. In the small office, however, employment of the force is likely to be added to his other duties. In such cases, it is well for the manager to attempt to make a job analysis and a personality analysis of a prospective employee somewhat along the lines of those made by employment specialists. Before seeking to fill a prospective vacancy in his office he might make a job analysis to learn what mental and physical effort the job required, and what skills and responsibilities were involved in its performance. For his assistance in selecting from a field of candidates for the vacancy he might make a useful personality analysis of each applicant, studying him from the bases of the following traits and capabilities: (1) social; (2) mechanical; (3) physical; and (4) mental.¹⁰

The staff under the control of the office manager always includes the stenographic and filing staff, the machine operators, and the reception clerk and the messenger boy if such are employed.

¹⁰William Odom, "Teaching Foremen to Teach Workers," American Business, (March, 1942), pp. 19-20; 45.

The office force which the manager selects may or may not include one or more secretaries, depending upon whether the executive staff is large enough and busy enough to need the services of more than one private secretary. In many concerns the secretary is responsible only to one executive and has no contact with the general office. In a number of small offices, there is an overlapping of stenographic duties and secretarial duties, so that a competent senior stenographer may be responsible under the manager's supervision for correspondence, transcription and mailing and be called simply the secretary. In such instances, it is imperative that any amount of authority assigned to this worker may clearly be understood as to its scope and limits by herself and her fellow workers.

In any case, there are certain qualifications of an A-1 secretary which also apply to an A-1 stenographer or other woman employed in any office. A simple numerical listing of these qualifications without regard to their importance would be: (1) technical preparation; (2) courtesy; (3) accuracy; (4) attractive appearance; (5) personality; (6) loyalty; (7) good health; (8) dependability; (9) initiative and judgment; (10) interest in work; (11) profitable time after work; (12) native intelligence, tact, and a memory for faces; and (13) the ability to get along

with others.¹¹

It is the duty of the office manager, or his correspondence assistant, if the size of the office justifies such an assistant, to standardize the quality of work that is acceptable for mailing in the name of the concern. It is a test of the supervisory capacity of the person put in charge of the firm's correspondence if he can get the cooperation of all stenographers and typists in matters of good form, style, and vocabulary, as determined by the desires of his superior officers.¹²

The typist is usually a young person with little experience, although her training may be very good. It is a wise procedure to allow such a young person to understudy one of the best of the older employees so that she may become proficient in the practices of the particular office by which she is employed.

Most business concerns find that neat and accurate women, intelligent and well-trained, give the most satisfactory service as file clerks. Women can handle such detail work as filing involves with more persistent accuracy and patience and with swift automatic expertness, according to Galloway.¹³ The work of the filing department

¹¹Marie L. Carney, The Secretary and Her Job, pp. 264-273, ff.

¹²Neuner and Haynes, op. cit., p. 58.

¹³Galloway, op. cit., p. 157.

is of two types. First, there is the usual storage of papers which requires little training beyond a mastery of the filing system used by the individual concern. Such a job can easily be performed by any careful and neat young beginner. The second type of job found in the filing department requires the services of an expert who understands something of business analysis and who is willing to keep the affairs of the company under her individual care. Many concerns employ women trained as librarians or teachers in their filing department.

Machine operators likewise are of two classes. The novice clerk can with a little training operate the ordinary hectograph or mimeograph machine. The billing machines and bookkeeping machines and others of a complex nature must be handled by specially trained experts. It is often a matter requiring some diplomacy on the part of the manager to insist on accurate and careful work on the part of these specialists when he cannot operate the machines under discussion. The wise manager will see in the work of the specialist an opportunity to achieve greater efficiency and will endeavor to bring the specialist's work into cooperative functioning with the remainder of the office.

The accounting department of most concerns is not considered as part of the general office force, although

desk accommodations may be provided for them in the general office. Usually they are responsible directly to the treasurers and are in a separate office, even in firms of modest size. Wherever their desks may be located the accountants work under the head of a chief bookkeeper who is responsible for their work, as the representative of the industry's treasurer or chief cashier.

The other workers directly under the office manager's supervision include the receptionist, the switchboard operator and the messenger boy. Quite often one young woman serves as both reception clerk and switchboard operator.

Problems in Regard to Personnel

Discipline.--The chief problems which confront the office manager are those having to do with discipline, salary, and promotions. Since the office manager must establish his authority before he can settle any arguments, he is wise to settle problems of discipline first. Chester I. Barnard says:

There is no principal of executive conduct better established in good organizations than that orders will not be issued that cannot or will not be obeyed.¹⁴

¹⁴Chester I. Barnard, The Functions of the Executive, p. 167.

The secret of real discipline in any office regardless of its size is complete cooperation among the personnel as a whole. As a manager increases a spirit of fellowship in the work among his force, he answers his own questions of office discipline for the group as a whole. A few ways of increasing cooperation within one's office are (1) issue clear and precise orders and make sure they are understood; (2) let your workers know you have confidence in them; (3) do not overload them with work or responsibility; (4) assign only such duties as can be well done; (5) ask for no work that you would not be willing to do yourself; (6) provide adequate equipment and good working conditions; (7) encourage workers to improve their skills and opportunities; (8) plan, organize and schedule job operations precisely; (9) give credit for good work; (10) be accessible; ready to confer freely; (11) take a sincere interest in the welfare of the men; and (12) organize harmonious work sections.

Two other ways in which a young man can do much to preserve a harmonious spirit in his office are (1) play no favorites--be the same to all employees; and (2) be neither too formal nor too familiar with the people under one's supervision. This last bit of advice is especially timely where there are few workers.

The problems which confront the office manager range over a wide field of activities and biases. One problem which must be met is the inability of otherwise useful employees to master a necessary technical skill, as when an otherwise pleasant-mannered and prudent receptionist becomes hopelessly embroiled when placed at the switchboard, or, a more serious form, the instance of the secretary who is competent with pad, pencil, and typewriter, but lost in a maze on the processes of the simplest machines. If the employee in question can work alone in quiet for a time, unrushed, but with assistance at hand, she may conquer the nervousness that is often at the root of such behavior. If she cannot be taught, the manager is faced with the alternate choices of replacing her or tolerating a technical inability because of her other work or personality compensations. If inability is due to laziness or lack of ambition, the promise of a small raise in salary might prove sufficient incentive for after-hour work to master her technical weaknesses.¹⁵

A second disciplinary problem is the handling of absenteeism and tardiness in the office. The Bureau of

¹⁵"Business at War," An Editorial in Fortune, Volume XXIX, (January, 1944), p. 50.

Labor Statistics defines absenteeism:

Absenteeism is the failure of workers to report on the job when they are scheduled to work. An employee is to be considered scheduled to work when the employer has work available and the employee is aware of it, and when the employer has no reason to expect, well in advance, that the employee will not be available at the specified time.¹⁶

The causes of absence from work are "as various as human behavior."¹⁷ It will be a part of the duties of the manager to list such absences as he will excuse, such as illness, death in the family of an employee, jury duty, absence for military examination, and other unavoidable causes of loss of working time, and insist that his office force expect to pay for other time-off in the form of loss of time from vacation, less bonus than otherwise, or loss of pay when absent inexcusably. Insistence that each employee's desk be cleared before she can leave at the end of the day is a method of handling tardiness; loss of bonus is another. Clock-watchers belong in this category, but there is little that the manager can do except to insist that they finish a day's work before

¹⁶ Auditing Absenteeism, Special Bulletin No. 12-A, United States Department of Labor, Washington, D. C., p. 1.

¹⁷ Controlling Absenteeism, Bulletin, United States Department of Labor, Washington, D. C., p. 9.

leaving their desks.

Other problems which confront the new manager are those best handled individually, since they usually originate in the malice, or thoughtlessness, or jealousy prevalent in the mind of one of the staff. These problems include gossip, grape-vine talk about salaries, promotions, private affairs of superiors. If the manager can successfully reprove or isolate the guilty one in such instances, he will be awarded by an improved attitude on the part of the other members of his force.

Salary.--To create a just salary schedule is probably one of the most difficult tasks of office management.¹⁸ The salaries of workers in an office should vary according to the skill required to do the work in the position which they fill. An office manager may have a specialist working under his supervision in some line whose training is such that he is paid as much or more than the manager himself. On the whole, office workers understand that the law of supply and demand functions in setting the value of their services within an office. They are satisfied that training, experience, and skill should make differences in the pay envelope. It is for the manager to be careful that he sees that no favorites are played on the payroll of his department.

¹⁸Neuner and Haynes, op. cit., p. 455.

There is a growing tendency to measure the productivity of office workers in certain positions in order to pay wages fairly. Workers who might be so measured are: transcription machine operators, filing clerks, stenographers, calculating machine operators, billing machine operators and mail clerks.¹⁹

The bonus and the annual vacation are features of office work which take some of the sting out of the prevalence of low salaries for office workers.

Analysis of Questions on Personnel

The first question asked the managers of small businesses was: Which type of training do you consider preferable (of three kinds) for a prospective office manager? Rate 1, 2, 3. The following table gives the answers.

TABLE 3
PREFERABLE TRAINING FOR OFFICE MANAGER

	College Training--Little Experience	Much Experience--Little Academic Training	Specific Training on the Job
First Rating	6	10	4
Second Rating	8	12	0
Third Rating	3	6	11

¹⁹Ibid., p. 458.

These answers are of value in showing two things: first, that it seems to be generally felt in this group of office managers that experience is the most necessary part of the managerial training; and, second, that training on the job appeals only to those engaged in special kinds of work. In this study the managers favoring job training were engaged in government censorship and auditing work, and real estate management.

The second question on personnel asked for a rating of four characteristics deemed more or less desirable for the person who would supervise others to possess. The answers follow.

TABLE 4
DESIRABLE CHARACTERISTICS OF OFFICE MANAGER

	Leadership	Foresight	Honesty in Dealing with Force	Good Basic Training
First Rating	10	2	2	6
Second Rating	5	3	7	5
Third Rating	5	5	5	5
Fourth Rating	0	9	5	6

The overwhelming vote given to leadership and the high number of votes given to basic training is rather at variance with the academic ideal of the successful office manager whose foresight and honesty in dealing with his staff ranked highest among traits desirable in a supervisor. The vote given leadership may be explained by the fact that people possessing traits of leadership are prone to admire authoritative personalities in others.

The third question asked what employment procedure was in use in each particular office. The results showed that employment offices were maintained by five concerns; the manager chose his staff in fourteen instances; and other methods of employment were used in one case.

The answers to this question reveal that there is a decided practice in small offices of allowing the manager to choose his own staff. The only instance in which neither office manager nor employment office chose the staff was in the case of the church, where for obvious reasons the minister is held responsible for the selection of all employees.

The fourth inquiry of the questionnaire listed a number of traits which would seem desirable in an efficient woman office worker and asked the managers interviewed to evaluate these traits as personal characteristics. The first four choices in each selection are shown in Table 5 on the following page.

TABLE 5
DESIRABLE TRAITS IN A WOMAN EMPLOYEE

	First Place	Second Place	Third Place	Fourth Place
Accuracy	8	1	2	1
Personality	3	1	1	0
Dependability	2	6	2	3
Initiative and Judgment	2	3	4	2
Native Intelligence	2	2	0	1
Loyalty	1	0	2	1
Ability to Get Along with Others	1	0	2	3
Interest in Work	1	1	1	2
Courtesy	0	1	3	0
Attractive Appearance	0	1	0	0
Technical Preparation	0	4	1	3
Good Health	0	0	2	4
Profitable Use of Leisure Time	0	0	0	0

In answer to the question as to whether men and women were accorded identical treatment as a matter of company policy, nineteen answered in the affirmative. The twentieth answer was that of the real estate company, which said that it was not their policy to employ women in certain

types of jobs, nor men in others.

The question as to whether skilled machine operators were employed showed only five offices answering in the affirmative. The machines used were bookkeeping, comptometers, billing machines, and calculators.

In answer to the question as to whether the bookkeeping was a part of the work of the general office, eleven firms answered in the negative and nine in the affirmative. Of the nine instances in which bookkeeping was a part of the duties of the general office, five put its supervision under the manager, three under a head-bookkeeper, and the church under the supervision of the pastor.

The answers to question 8 as to how the grievances of employees were handled showed the following results:

TABLE 6

METHODS OF HANDLING GRIEVANCES

Method	Number
Routine Consultation between Manager and Employee	2
Employee's Committee with Usual Spokesman	6
Discuss Troubles Man to Man	11
No Definite Policy	1

It seems a strange fact that on the whole the large offices are no more committed to such definite grievance

policies as routine consultation and the use of a committee spokesman than are the smaller ones in the group. The postmaster's office, with twenty-two employees, followed no definite grievance policy.

Question nine asked which problem of office discipline had to be met most often. The results are given in Table 7.

TABLE 7
USUAL CAUSES OF DISCIPLINE

Cause	Number
Lack of Technical Ability	6
Bad Feeling among Force.....	0
Too Much "Grapevine Gossip"	3
Absenteeism	5
Jealousy over Salaries, Pro- motions, etc.	2
Tardiness	0
Stupidity or Bad Training in Handling Machines	0
Clock Watching	3
Other	1

One (the church office manager) said that their chief problem was a piling up of work, or the inability of the staff to keep their desks cleared. The two obvious remedies for this state of affairs, namely employment of part-time help at rush periods of the month, or the spacing

of work through the month in anticipation of busy periods were neither suggested by the manager of this particular office. Seven other offices had no suggestion to make as to the best way to meet their particular problem, nor did they answer the question as to how they were meeting it at all. A ninth company, whose problem was "grapevine gossip", answered that it was the policy of their company, a real estate office, to ignore the evil entirely.

Three offices, the newspaper credit office, the department store credit office, and the wholesale grocery general office, felt that the best way to meet their problem of lack of technical ability on the part of employees was to replace inefficient personnel with better trained workers whenever the opportunity presented itself. The banker suggested a more positive approach to the same problem by saying that he insisted on more intensive training on the part of the employee to meet his technical shortcomings as they were brought to light by his work. He felt that the bank and the employee should share the burden of the extra training: the employee by working after hours at study; the bank by assuming the cost of the extra training.

The postmaster reported a lack of technical ability as the greatest weakness of his office staff. He said that the workers were put on their mettle to increase their efficiency by the fact that their pay was on an

hourly basis, and that the only way in which they could increase their pay was to increase their output of acceptable work.

Two office managers attempted to meet the problem of gossip within their respective offices in a positive manner. The instructor in army pilot training met the situation by having open discussions with the men at which any question of discontent, or any rumor could be discussed freely. A censorship office of the government met the same problem by determining the source of the gossip and having a personal consultation with the person responsible for its origin.

The question of absenteeism was the major problem confronting the manager of each of five offices. Two reported a method of coping with the situation. The retail shoe store docked its workers when absent unless really ill enough to have the services of a physician. The loss of accumulated leave was felt by a government office to be an effective check on absenteeism if the office force were reminded sufficiently that such a loss meant a curtailment of their vacations.

Asked in question ten if their companies gave training on the job, fourteen managers said such was their policy, while six answered in the negative. Only nine firms used understudies. It is significant that understudies were used only by concerns which gave on-the-job training.

CHAPTER III

CORRESPONDENCE AND TRANSCRIPTION

It is very probable that the most important feature of the work of a successful office manager is the organization and maintenance of an efficiently functioning secretarial force. The reasoning behind such a statement is verified by the assertions of experts to the effect that at least one-third of the activity of the average office is manifested in the form of its written communications.¹ The importance of the letter writing functions of the office lies in the fact that the letter takes the place of a personal contact between the firm and a second party with whom the company is doing business. If the secretarial force is efficient, loyal, and cooperative to the point of making their letters a proficient instrument for furthering the business of the concern for which they work, the manager is by way of acquiring the mastery of one of his needed techniques.

With the importance of the secretarial activity of his office in mind, the manager must ascertain certain

¹Neuner and Haynes, op. cit., p. 45.

features of the technique of the letters which leave his domain. He should be certain that the motive behind the writing is clearly one of the recognized functions of the business letter; namely, (a) to make a record; (b) to communicate a message to readers in such a way that they will make sales (either goods or ideas); and, (c) to build good will for the firm.²

It will be of great help to the young manager if he will learn to look for certain factors in the letters that leave the mailing basket of his office. These factors are: (1) the form of the letter; (2) the content; (3) the control manifested in it. Since letter writing is an expensive item of office upkeep, involving as it does the price of stationery and mailing as well as the cost of labor and machines, it is well for the manager to see that his force applies these factors as effectively as possible in handling the correspondence for which he is responsible.

The first of these factors, that of form, is altogether within the province of the office manager. By means of tact, perseverance and quiet supervision, he can improve and unify the mechanical structure of the letters which leave his office. A mimeographed manual

² Loso and Hamilton, op. cit., p. 193.

dealing comprehensively, but simply, with such salient points as the writing policy, standards, and structure preferred by the company is an invaluable aid to the stenographic force. Such a manual can be compiled in the office at no cost except in time. The manager's choice of a good quality of stationery, and the use of restraint in the choice of letter heads aid the mechanical structure of the letter and are a source of pleasure to the reader, as well as an incentive to the typist.

An effective scheme in securing secretarial cooperation is to invite an outsider to lecture to the office force on good form in a business letter.³ Still another method of keeping the stenographic staff alert to the possibilities of their job is to have several good business magazines available for outside reading by members of the office force.

The two factors of content and control in the construction of an effective business letter are not often regulated by the office manager except when he is asked to compose and circulate form letters dealing with some phase of the company's activities. He can, moreover,

³Plan used quarterly by Gilbert Lang, Manager of Frost Brothers, San Antonio. Mr. Lang's only comment on his plan is that the only available speakers are advertising men. Rarely is he able to contact a secretary or credit man willing to speak before his office force.

be of assistance to the firm in the prevention of the mailing of insulting letters when credit is denied an applicant by having impersonal form letters on hand for use on such an occasion. He can also prepare for the credit manager a series of letters, each more insistent in tone to be used when it is obligatory to insist on the payment of an overdue debt. In many offices, form letters of many sorts are a recognized office commodity to be used as a time saver. In no case, however, is the manager able to change the content or the tone of a letter unless he is its author or is authorized by the author to do so.⁴

In some small offices the problem of issuing monthly reports either to a head office situated elsewhere or to the board of directors is obligatory. Such a duty clearly calls for the most careful accuracy and concise English construction on the part of the manager who should compose his own report, and call in the mechanical aid of the best stenographer on his staff in typing and mimeographing it in an attractive manner.

The question of issuing manuals differs from firm to firm with but few small firms issuing manuals of any

⁴W. P. Boyd, Some Fundamentals of Good Letter Writing, p. 71.

kind. A bulletin board or a circular note can take the place of the manuals addressed respectively to employees or shareholders when the concern is small. However, a manual on correspondence and one on filing as done in that particular office are available aids to the new employees of a business.

Whatever methods the manager resorts to in an effort to maintain a high standard of correspondence output, he will run into a few inevitable problems of office discipline in handling his secretarial personnel. The first of these is found in the case of the slovenly stenographer who should be fired post haste, unless her slovenliness is really a lack of manual manipulation and the firm has the time and money and the manager has the confidence in her ultimate usefulness to justify keeping her on the payroll until she has improved. The second type which must be watched is the one who exceeds her instructions in her desire to put out a forceful letter. If she is a beginner, the manager can check this tendency by a scolding or two. If she is experienced and should know better, she, too, should be dismissed before the company finds itself facing unauthorized commitments.

A third type of secretarial help with whom the manager may have to deal with some force is the really

efficient secretary who insists on correcting blunders in English and errors in punctuation made by those for whom she takes dictation. It is the manager's duty to remind such a worker that what is meant to be an evidence of efficiency is taken for officiousness by her superiors.⁵

A second problem to be solved by the office manager concerns the distribution of work among the stenographic force. All the executives will seem to prefer to have the same girl work for them, either because of her good work or pleasant demeanor. Two effective remedies have been suggested for this situation: first, allowing one efficient and pleasing secretary to take all dictation with the aid of a machine and return it to the office for transcription by any member of the stenographic force. A second and more effective method is to have all the officials of the company agree that they will accept whomever is sent to them by the office manager for the day's dictation; it is then incumbent on the manager to rotate his force, if he wishes to keep the executives of the firm satisfied with his management.

There is another side to the question of dictation which also requires tact on the part of the office manager. Not every man who can organize a business or sell a product

⁵Florence E. Ubrech, "Finding A Market for Your Fastest Writers," The Business Education World, Volume XXIII, (May, 1943), p. 562.

can dictate a letter. Too often, the stenographic force complain bitterly of having to take dictation from a certain executive; he mumbles and cannot be heard accurately; or his English is so poor, or he wanders from the point, but is angry if his finished letter reveals these faults. The suggested way to handle such complaints is for the manager to follow one of two courses: either to discuss the matter with his oldest and best stenographer who could be more or less impervious to criticism from the offender and gain her cooperation so that she will take all this man's dictation calls. A second method is to have a frank talk with the man's superior and urge that the executive in question be taught how to dictate.⁶

The third question which confronts the office manager in acquiring a technique of managing the secretarial force under his supervision is the question of method of dictation-transcription to be advocated by him and followed in his office. The most popular method is the use of shorthand and transcription from the notes taken by oral dictation. In the long run, however, machines pay for themselves with the results of increased accuracy and decreased personnel. The question for the office manager and his superiors to decide is whether they have correspondence

⁶Galloway, op. cit., p. 527.

enough to justify the hiring of such highly trained secretaries as those who use machines, and do only that work, or whether they prefer a larger staff whose members can be assigned other jobs besides those in the field of correspondence.

The problem of handling the mail in a small office is a vital one for the manager to solve if he is to maintain an efficient secretarial technique. In large offices, one or more mail clerks take charge of the incoming mail, and route it correctly. In the small office it is usually one of the jobs assigned to the messenger. An approved method of handling the opening of the mail when there is no mail clerk is to have a reliable employee read each piece hastily and drop it in a mail basket belonging to the department manager dealing with the business brought up by that particular piece of correspondence. After the mail has been read and assigned to the proper baskets, the messenger delivers it to the desks or offices concerned. Mid-afternoon, the messenger collects all mail, brings it to the desk of the person who is in charge of it, and it is there stamped and sealed. Some firms require that the mailing clerk or secretary in charge of the mail open each piece to see that it is in proper order and signed.

Some offices prefer to use stationary mailing racks, with a compartment for each executive and a compartment

for each department of the company. In such instances an employee of the department comes to the general office for the mail and brings it back mid-afternoon. Such a procedure eliminates the necessity for any supervision in the general office beyond opening the unidentified mail for assignment when it comes in.⁷

The manager is faced with a number of problems to solve in regard to the mail procedure. First, he must watch the expense of stamps. Second, he must learn to tie his mail schedule onto the local train schedule, if the service is to be efficient. There is little point in sending the messenger to the postoffice at nine, if the most important mail delivery is made by a twelve-o'clock train. Each piece of mail has been estimated to take thirteen motions besides those consumed in the actual dictating and transcribing of a letter. It is the problem of the manager to facilitate those motions as much as possible. Automatic sealing and stamping machines, though an initial expense, are a time and energy saver in the long run. A second saving is to keep the executives aware of the fact that the mail is extra heavy at certain times with monthly statements, bills, payments, etc., and tactfully insist that they

⁷ Eugene J. Bengé, Office Economies, p. 82.

plan any mail campaign so that it will fall between the periods of already heavy mail pouches such as occur around the first, tenth and fifteenth of the month usually. Such a procedure avoids a taxing of the mailing facilities of the office as well as an overloading of the desks of the company secretary's and allows the manager to keep to his policy that each desk be cleared at the end of the day.

Analysis of Questions of Secretarial Procedure

The first question asked on correspondence procedure was: Does your office have a definite mechanical style required for each type of letter? The answers showed that six companies of the twenty answering the question used specified mechanical structures for various types of letters, while fourteen companies had no set forms to be followed. The six firms using form letters were the adjusting department of a large retail store, the advertising business, the church, the real estate office, the storage and transfer company, and the government auditing office.

The second question was in regard to the training period planned for a new stenographer. The results were as follows: fifteen firms trained new stenographers under a veteran employee. Five firms required that the manager give the new worker any necessary instructions. No firm

planned for her to study alone, using their form letters, typed letters, or a manual as her text. This fact would seem to discredit the academic advice to issue manuals of instruction, although larger concerns have found them most convenient.

The third question asked whether the secretaries working in the concern were under the management of the general office. Fifteen firms had the secretarial staff established as a part of the general office; the other five answered in the negative. In these instances, each secretary was responsible to an executive of the firm. The five concerns not holding the secretary accountable to the office manager were the postmaster's office, the newspaper office, the government offices of censorship and Spanish translation, and the church.

The fourth question asked if the company had any program of teaching dictation to executives. The twenty answers were in the negative.

The fifth question asking what system of transcription was used in each office questioned showed the following results:

- a. 19 used notes in shorthand.
- b. 1 used the dictaphone.
- c. No more complicated transcription machine was used in any office.

The answers to the question as to who had charge of the outgoing mail in the office is given in Table 8 below.

TABLE 8
MAILING PROCEDURE

Method	Number of Users
Mail Clerk	8
Manager	4
Each Executive	0
Each Secretary	7

The business firms feeling justified by their volume of correspondence in employing a mail clerk included both mercantile companies, the bank, the auditing department of the Board of Education, the Army Aviation Instruction Office, the real estate company, and two of the government offices. The size of the office seemed to have no bearing on whether the manager added supervision of the mail to his other duties, for the offices of the postmaster, the government censorship office, and the large wholesale grocery concern relied on managerial supervision in the same manner as did the small grain company. In no case did an executive of the company assume this responsibility although in seven instances mail supervision was a duty delegated to a secretary.

The question was asked: Have you any system of checking on your letter-writing system? Three firms answered in the affirmative, seventeen in the negative. Methods of checking are listed in Table 9 below.

TABLE 9
SYSTEM OF CHECKING ON MAIL

System	Number of Firms
a. Review of the mail (U. S. Censorship Office)	1
b. Satisfaction of the customer (adjusting department of a retail store)	1
c. Sales (real estate office)	1
d. No Method	17

The eighth question asked what machines were used in the secretarial program besides typewriters. Eleven office managers answered that no other machines were used. Nine used machines besides the typewriter. Table 10 on the following page names the machines used.

It may be pointed out that the use of adding machines and calculators by the secretarial force suggests an extension of the duties assigned to the secretary rather than an assumption that the successful manipulation of these machines is a part of a secretarial program.

TABLE 10
MACHINES USED BY SECRETARIAL STAFF

Type Machine	Number of Users
Mimeograph	1
Teletype	1
Marchant	1
Adding	4
Check-writers	1
Dictaphones	2
Transcription Recorders	1
Calculators	2

A question as to how the work was assigned to members of the secretarial staff brought the following answers: In nineteen offices the individual stenographer handles whatever work the day brings; these companies do not encourage specialization. In one office, that of the church, certain members of the secretarial staff handle special types of letters, as collections, grievances, or courtesies.

The tenth question was in two parts: First, it was asked if the office issued any manuals. Seven managers replied "Yes." These manuals took the forms of church bulletins, sales manuals, technical manuals for air mechanics training purposes, government manuals, procedure

manuals. It is interesting to note that all government offices, except those of translation and censorship, were required to issue manuals.

The second part of the tenth question asked if reports were issued from the general office of the company under the supervision of the manager. Fourteen managers are required to issue reports. The office making the report and the recipient of it are listed in Table 11, which is found on the following page.

The answers to these questions on procedure in Correspondence and Transcription reveal several interesting facts. First, the demands put upon the secretarial staff by the small office are relatively simple; the secretary is not required to handle complex machines; she is helped with the mail in many instances; she is given initial training by a veteran employee in most instances. It is disappointing from the viewpoint of the ideal office that no firm assays the task of training its executives in dictation so as to facilitate that phase of the secretary's work. It is also disappointing from the ideal outlook that only one instructive manual is issued by any office interviewed and that manual was on technical work in connection with the army air training program, and not a leaflet on office programs or practices.

TABLE 11
USE OF REPORTS

Type of Office	Recipient
Newspaper Credit Office	Publisher
Adjustment Department Retail Store	Credit Manager
U. S. Censorship Office	Headquarters U.S. Treasury
Mercantile Company	President of Company
Purchasing Office Board of Education	Business Manager
Auditing Office Board of Education	Board Members State and Fed- eral Governments
Wholesale Grocer	Owners, Federal Government
Real Estate Company	Progress of Sales to Clients
Air Service Command	Aviation Head- quarters
Advertising Office	Sales to Clients
Government Auditing	Headquarters
Office of Postmaster	Postoffice Depart- ment, Federal Accounting Office
Church	Statements to Board of Stewards
Office of Translation	U. S. Treasury-- Washington, D. C.

CHAPTER IV

ADEQUATE FILING SYSTEMS FOR SMALL OFFICES

It has been said that there are five principal ways in which a business man can dispose of the work piled up in his office: he can destroy, dictate, transmit, hold, or file.¹ When there is any doubt as to which of the other four courses he should resort to, filing becomes the one way of disposing of the matter for the time being at least.

The five types of filing found in use in contemporary offices are alphabetical filing, subject filing, geographical filing, chronological filing, and numerical filing. The alphabetical file is the one most commonly employed, perhaps because it is the most easily understood. It should be used beyond doubt when the names of departments or places are asked for and when no subheadings are required. Chronological files work well in certain types of businesses, as clinical offices, and geographical files are useful in businesses which do much road-selling. Geographical files are simpler than the other types as they do not need a cross index. Both are relatively simple when used in certain

¹Benge, op. cit., p. 60.

phases of a business. Subject files and numerical files are very complicated and are recommended only when there is to be expert cross-indexing with either a numerical-alphabetical index or a numerical-subject index.

The first problem which confronts the office manager is that of whether the advantages of a central filing system located in the general office and under the care of one trained employee can offset the advantages which many executives see in having individual files located in their respective offices. If the preference of his superiors is heavily on the side of individual files, there is nothing to be gained by keeping up an argument for general files. On the other hand centralization under a trained worker does result in certain definite improvements, such as: superior condition of the files; greater accuracy in filing; quicker location of papers; systematic weeding and transferring; elimination of duplicate copies; fewer filing cabinets required; standardization of equipment facilitated; positive control of material out of files.²

If the manager is able to persuade his superiors to install a central filing system, he has solved the problem of availability of materials to all concerned. He is ready to face the problem which arises when records

²Ibid., p. 61.

are completely accessible; namely, the problem of being certain that no material is kept out of the file room beyond a reasonable length of time. Most firms meet this problem by not allowing any material to leave the files except by the written order of an executive officer of the firm. They provide writing facilities in the file room where all data can be copied. Others use a system whereby a memorandum as to the information desired is left with the file clerk and she sends up the information within a reasonable time. Such a method, however, requires a large and competent filing force. Whatever method is used, it is most important that only one person be in charge of the files and completely responsible to the manager for their up-to-dateness and condition. She may be a filing clerk, a typist, or in cases of very simple and little used files, a combination filing clerk and typist with even more duties.

The problem of the cost of the files to the company can only be answered in terms of their usefulness. In a business which has little credit work, little correspondence, no need to keep check on people in any way, any elaborate filing system would never pay for itself, but in the average office a good filing system is found to be worth maintaining in direct ratio to its accuracy.

The question is usually how complicated a filing system should be used, not whether any at all is advisable. Again, the answer as to how large a filing system should be depends on the need to know about individuals, businesses, departments of businesses, institutions, and so on. A grocer needs a file, for instance; he can thereby keep record of the places to buy certain commodities best or keep tab on the credit rating of customers; but he has not the need for the cases and cases of files which is the experience of a legal firm who deals with individuals over a wider range of territory and circumstances and in a less obvious manner.

The fourth problem to confront the manager in selecting a filing technique is the problem of policy regarding old material. What to keep and what to throw away! Many companies make it a rule to have the files cleared annually, although it is impossible to do this in many cases. The Department of Internal Revenue has ruled that records bearing on income taxes must be available over a five-year period, so it is certain that records will have to be accessible for that long a period.³

Two other duties for the office manager are involved in the proper handling of the filing system: first, he

³Ibid., p. 169.

must be sure that the employees who are allowed access to the files realize the confidential nature of the material on file and refrain from repeating any gossip about it; second, he must supervise his office files as closely as he does his correspondence or his personnel.

Analysis of Questions on Filing

The first question of the section of the questionnaire devoted to filing procedures asked what method of filing was used in the office to which the inquiry was sent. The answers are given in Table 12.

TABLE 12
KINDS OF FILES USED

Kind	Number of Users
Alphabetical	10
Subject	7
Geographical	1
Numerical	0
Other	2

The wholesale grocery concern used the geographical file with subject files for cross indexing. The offices listed as using files other than those mentioned in the questionnaire were government offices, which used the Dewey Decimal System with subject files for cross references.

The form has been very adequately described by Sergeant Fred C. Archer, who says:

Filing must be kept up to date and must be attended to every day--perhaps several times a day on busy occasions. Filing for a small unit is simple but must be done very carefully, because the documents, some of which are of a highly confidential nature, must be available for immediate reference.

An adaptation of the Dewey Decimal System is most commonly used. A "file out" control card system is used to account for files removed. Two unusual features of our system are a file key, which is placed in front of the file to assist officers and other authorized persons to find information at any time, and a master correspondence file, containing one carbon copy of every letter or endorsement sent out, arranged numerically by letter number. This serves in emergencies when material cannot be readily located in the main subject files.⁴

The second question asked if the particular office being queried had a training program for its filing clerk. Seven offices answered in the affirmative. Their number included the credit office of the newspaper, the adjustment office of the retail store, the bank office, the hospital office, and three governmental offices.

The third question asked if it was always the policy of the concern being questioned to hire a girl for a filing

⁴Fred C. Archer, "Office Work in the Army," The Business Education World, (May, 1943), Volume XXIII, p. 521.

clerk. Fourteen firms answered that they used girls only for filing clerks; the city Board of Education office, the storage and transfer office and three government offices, including that of the postmaster, replied that they did not discriminate; the office of government censorship replied that it used either men or girls as filing clerks according to the grades made on competitive examinations. The reasons given for using girls as filing clerks varied. One answer said that girls were "more active." Another said that "More women are available for such a low-salaried position." Another briefly said that girls are "best suited." One said they were "more adept." The adjusting department manager said, "They are cheaper and just as satisfactory." The aviation instructor said, "A competent woman is seemingly more careful." One manager of another government office said the girls usually seemed to pass the examinations better. A number of firms did not explain their choice.

The office managers were asked which of certain problems had developed in regard to their filing procedure. Their answers are given in Table 13 on the following page.

Four of the offices complaining of careless filing had training programs. Only one used a complicated system and that was the air service command which uses the Dewey Decimal Modified Form; the other three used alphabetical

TABLE 13
FILING PROBLEMS

Type Problem	Number of Cases
Loss of Files	1
Tardy Filing	1
Careless Filing	9
None	9

filing. The five companies complaining of careless filing but not using training programs all used simple alphabetical files.

The question as to whether the files were open to the entire staff of the concern brought an even division of answers, for ten firms kept their files available to the entire force and ten kept the files open only to certain authorized persons. All government offices, the two retail stores, the newspaper, the advertising company, the wholesale grocer were among those whose files were not available to the entire concern. Question 5 asked also if, in the cases where the files were available for the entire concern, any problems had arisen over the return of materials. The firm whose office manager has checked loss of materials to other departments as the major filing problem encountered listed return of materials from other departments as a problem arising from availability for the entire concern.

The managers were asked if the filing system used in their respective offices stayed within its allotted budget. All twenty managers answered "Yes."

The next inquiry asked if the files were used enough to justify their upkeep. Again, as in Question 6, all the managers gave affirmative answers.

The last question on filing asked whether the business employed one or more persons whose only duty was filing. The results were equally divided, for ten offices employed filing clerks with no other duties and ten combined the work of filing with other duties.

On the whole the answers to the questions on filing show an active interest in the use and care of the company's files on the part of the office manager. Many added comments to answers, saying that the work was most important. The manager of the hospital office remarked that they could not work without their files. On the whole, there seemed to be great assurance that the files of their respective companies and the young women who cared for them were a constructive part of the business.

CHAPTER V

THE CHOICE OF EQUIPMENT FOR THE EFFICIENT OFFICE

Neuner and Haynes have summarized the responsibilities of the office manager regarding the equipment of his company. Their summary says in part:

In summary, the responsibilities of the office manager as they pertain to the office building include the following: most effective floor layouts; lighting, both natural and artificial; reduction of noise and dirt; efficient heating and air conditions; utility services, including locker rooms, drinking fountains, restrooms, lavatories, and elevators; location, number, and distribution of private offices, conference rooms and public reception rooms; planning for future expansion, maintenance and repair work; acquisition and storage of maintenance materials and tools; and the general safety of the employees located in the building or buildings under consideration.¹

Such elaborate duties in connection with the building in which an office is situated might be true in the case of large companies who own their office building. On the whole, however, a number of these duties are the work of the manager of the office building and are not within the power of the office manager to regulate even when he would desire to remedy some evil. Certain features

¹Neuner and Haynes, op. cit., p. 362.

are within his power, and the ambitious manager will do his utmost to see that the conditions affecting the air, the light, the heating and the cleaning of his office are above par so that his force can work in greater comfort which is conducive to greater speed. If he is a far-sighted man, he will maintain a small stock of repair materials and extras in the way of lighter equipment, accessible only to himself.

The conscientious manager will give much time and thought to the lay-out of his office. He will try to visualize the course of an order around the office and arrange the desks so as to prevent as much zigzagging as he can. He will see that desks are arranged to afford as much space between them for aisles as possible. He will see that the stock room is reasonably close to the elevator. He will place the desks of busy people who must have time to think sufficiently far back from the entrance so that they will not be disturbed by chance callers. If possible, he will remove any noisy machines to smaller rooms where they cannot disturb an entire group. He will use noiseless typewriters.

A manager who is fortunate enough to start in a new office is usually consulted about the furniture purchased for it. In such situations, he makes the decision between the new efficiency desk and the regular executive type,

chooses the type of files so that they may be uniform, and decides upon the type of desk chairs, as well as the floor covering. He will be wise to make his selections from the more conservative open stock material, bearing in mind that the darker office needs lighter furniture and flooring to keep down electrical bills; and that simplicity of line in furniture means simplicity in upkeep and repair.

The number and type of machines which the manager requests for the office under his supervision depends upon the type of work done in that particular office and upon the extent to which that work can be more efficiently handled by the mechanism of a machine. There have been so many recent refinements in highly specialized machines that the manager must be on the alert lest he be over-sold. The simplicity with which a machine operates, the amount of mechanical care it requires are secondary considerations in choice between makes after the manager is convinced that he can turn out more work with a given machine. The bookkeeping machine on which one trained girl can do the work of three good bookkeepers is a type of the expensive but efficient modern machine.² It combines typewriter

²Galloway, op. cit., p. 84.

and adding machine, enters the cash book entries and posts the ledger; other machines likely to be found in small offices are calculators, also used in accounting. In small brokerage offices connected with a larger city exchange are teletype machines. Secretarial forces often need the aid of dictaphones, and mimeograph and hectograph equipment, even when the office is very small. It is for the manager to be alert to the advantages to be derived from such aids and to procure them if possible for those who work under him.

The problem of inter-office communications is one to be solved by the manager of the new office. Many firms rely altogether on a messenger boy for inter-office communications. In such cases, the closed envelope method is a reliable help both to the boy and the office manager. The messenger has a list of men concerned by an order or a communication on the outside of an envelope. He calls at the office or the desk of each one whose name he has; these men take out the portion of the contents of the envelope which is marked for them and check their names from the messenger's list. Such a method is used predominantly in newspaper offices and banks in the region in which this study was made.³ More elaborate and often

³Method used by the Light and Express Publishing Companies of San Antonio and the Beaumont Enterprise of Beaumont, Texas, also by South Texas Frost National and San Antonio National Banks for inter-office communications.

too expensive methods of internal communication are the dictograph, the private switchboard, and the electric page bell. Such methods are, with the exception of the messenger service, confined to oral communication. Mechanical messenger service for written communication, such as pneumatic tubes, is too expensive and too elaborate to install in the average office.

One of the most vital problems to confront the manager is that of purchase and upkeep of supplies. The weightiness of this problem lies in the fact that it cannot be settled once for all time as can the choice of desks or lighting fixtures. The choice of stationery that is durable, color-fast in storage, of proper size is a problem. The choice of carbons that will print longer; of pencils that will not break in the sharpener; of sharpeners that will not break any lead; of index cards, folders, guides, file carbons; the purchase of these items is a major duty of the office manager. A second duty is the care of these supplies to see that they are not wasted. A wise precaution is to appoint a storeroom clerk who will assist any of the staff in finding needed supplies and issue them. In larger companies procurement memos, supply issuance days, and other devices keep down waste.

It is hardly necessary to remind the manager of any office that he is protecting himself as well as his company

if he keeps careful inventory of all furniture, machines, and supplies. It is for the company's protection in case of fire or complete breakdown in the case of a machine, or over-charging in the case of supplies. It is for his personal satisfaction should any question arise concerning his purchases or office expenditures. A copy of the inventory should be put in the company's vault, one given the president or chairman of the board, one given the general manager, and the office manager should keep one copy for himself. It is wise to re-post this inventory at least twice a year, if not quarterly.⁴

It is also wise for the manager to insist on a maintenance policy on the part of the company if complicated machines are used, so that he can get expert mechanical help as soon as a machine begins to show signs of slowing down. It is wise to follow some sort of bi-monthly check-up in the case of typewriters whereby after hours an expert cleans, oils, and puts them in perfect condition. Such precautions prevent work stoppages and increase efficiency.

In some cases the Board of Directors is little interested in office procedure beyond the two points of the

⁴Neuner and Haynes, op. cit., p. 346.

work's being turned out and the price of operation's being kept down. Should the manager find that he has become a supervisor for such a firm, he will do well to add the responsibility of staying well within the budget allotted him rather than reaching to the very limit allowed. If the concern begrudges necessary expenditures, it will certainly not be amenable to suggestions for even minor additional ones and it behooves him to make some adjustments and purchases out of his regular expense allowance. Most business firms prefer written requests for additional expenditures, and a brief accounting to the board or to the general manager as to how the office has spent its monthly or quarterly allowance. A small feature of the question of office budgeting is the problem of whether to keep an open cash drawer or not. In very small offices such a procedure is expedient; but as the force grows, it can become either unwieldy or unbusinesslike.

Analysis of Questionnaire

The first question asked on the general physical surroundings of the office was: Who is responsible for appearance and upkeep in your office? The answers are given in Table 14 on the following page.

The concern placing an executive in charge of appearances was the retail store. An auditing office placed this responsibility on the receptionist.

TABLE 14

RESPONSIBILITY FOR PHYSICAL CONDITIONS IN OFFICE

Person Responsible	Number
Manager	13
High Executive	1
Apparently Only Janitor	5
Receptionist	1

The second question asked what machines were used in the office. It was not to be confused with the question concerning secretarial machines as methods of stenographic procedure. Table 15 lists the machines used.

TABLE 15

TYPES OF ALL KINDS OF MACHINES USED IN OFFICE

Names	Number
Typewriter	20
Adding Machine	17
Dictaphone	2
Dictograph	1
Mimeograph	16
Teletype	14
Bookkeeping	7
Hectograph	2
Billing	3
Comptometer	3
Addressograph	6
Marchant	1
Special Proof	1
Checkwriter	1
Statement Projector	1

It is interesting to note that adding machines and mimeograph machines are considered almost as essential an

item of office equipment as the typewriter. The other machines differ as to the trend toward a special line of work in the different offices.

The question as to whether a clear maintenance policy in regard to repair work was observed by the concern brought affirmative answers from all managers except two. The government auditing office and the wholesale grocery company do not have a regular system for repair and maintenance work apparently, although the grocery business uses a number of highly complex machines such as the calculator, book-keeping machine, addressograph, and comptometer.

The question as to what inter-office communications were used brought the following replies which are given in Table 16.

TABLE 16
TYPES OF INTER-OFFICE COMMUNICATION

Type	Number of Users
Messenger	6
Telephone	20
Envelope	3
Inter-Communication System	1
Dictograph	1

Again, as in the case of the machines, it is interesting to note a tendency toward a more elaborate communications set-up than seems feasible in the small office.

All concerns except the two wholesale companies also answered in the affirmative the question asking if janitor or maid service were available. It is very possible that the need to be near the railroad and to consider warehouse conditions primarily in this type of work minimizes the needs of the office force in the eyes of the employers.

Only three concerns found the petty cash drawer with funds for small purchases for the office a wise procedure. The real estate office, the board of education office and the wholesale grain company used this method. The board of education put the funds under withdrawal by request to the manager for a given sum; the grain company put a clerk in charge, and the real estate company had the employee making a withdrawal leave signed record of the amount and reason for using fund.

On the whole, the demands in practice of the small office on its manager in the way of maintenance, budget for supplies, and complexity of office equipment seem modest and reasonable.

CHAPTER VI

SUMMARY

Restatement of the Problem

In the summer of 1944 the writer of this study mailed a questionnaire to twenty-four managers of small offices in the vicinity of his home at San Antonio, Texas. The questionnaire sought to ascertain to what extent the actual practices of small offices were in harmony with the procedures advocated in textbooks on office management, most of which seemed to describe situations in large and highly complicated offices. His purpose was to find out how much academic training could be carried over into the local situation where small businesses predominated by the student of business administration and how much training-on-the-job he would have to undergo before assuming managerial responsibilities. Twenty managers answered the questionnaire. These answers show points of similarity and of difference as regards academic teaching in business administration and actual office practice in the ordinary small office.

Results of the Study

On the whole the manager of the small office adopts

techniques and follows routines much in harmony with the situations which his professional training in college had taught him to expect and to recognize as conventional office procedures. The result of this study is to point out briefly the points of accordance and variation between the textbook and the actual business practice in the four techniques surveyed in this study.

1. In regard to the Technique of Personnel the student was taught by writers on management that much has been achieved toward the goal of efficient management when a cooperative staff has been engaged.¹ Actual practice in small offices according to the answers given in the questionnaire show the selection of cooperative personnel to be regarded by eleven of the twenty managers as the most important factor in office efficiency. Thus the academic theory of the textbook and the actual practice in the small office are in harmony.

The answers to the questionnaire on the type of training which rendered a man the most efficient as a manager showed that a majority of the managers themselves preferred men with experience to those with thorough academic training or on-the-job training, both of which were indicated as necessary by such writers as Galloway,

¹Neuner and Haynes, op. cit., p. 332.

Benge, Neuner and Haynes. This may be due to the fact that schools of business administration are so comparatively new in Texas colleges that their graduates have not yet had time to assume managerial positions and demonstrate the value of their training. It may be true on the other hand that the managers are convinced that maturity gives authority and that men with a longer acquaintance with a job would of necessity have greater maturity of judgment. Beyond advising that a manager make himself conversant with all details of the work under his supervision so that he can judge its quality, the textbooks take no stand on this question.²

The ratings on questions of personality characteristics to be found in the successful manager show that leadership is considered the most necessary trait. Again, textbook and business opinion were in accord. Business so constantly faces many acute problems that confident leadership is never underrated. The second place award to good training as essential to managerial success is in harmony with the idea of aggressive leadership, for it is usually the trained man who forges ahead.

The small office seems to be confronted with fewer varieties of problems of office discipline than its larger

²Galloway, op. cit., p. 454.

counterpart as depicted in studies on office management. The chief problems confronting the small office were the lack of technical ability, absenteeism, and grapevine gossip, while larger concerns are bothered with additional problems of lateness, waste of materials, jealousy, clock-watching and a number of other problems requiring managerial discipline.³ Training for inefficient workers after hours, attendance awards, and group discussions of office problems were among the respective positive methods of combating these trouble sources. In addition to these methods the textbooks mention the use of penalties in cases of absence or tardiness, or the removal to another department in cases of friction, but never summary dismissal of an employee. Perhaps because office workers are not well organized into unions in the Southwest and dismissal is still possible, a number of managers suggested the summary method of dismissal as a cure for existing problems of inefficiency among the office staff, especially where technical inability was involved.

2. The answers to the questions on Correspondence and Transcription dealt to a large extent with the duties assigned to the stenographic members of the office staff. The first specific question asked if the firm used form letters and the majority of the answers were in the negative.

³Niles and Niles, op. cit., pp. 116-118.

This is at variance with the teachings of authorities in the field of business letter-writing who advocate the use of the form letter as a time-saver.⁴

The training practices of small companies were not in line with the training methods observed by the larger companies, who, according to the textbooks, maintain their own training classes, which would of course be impractical for a small concern, and recommend classes in business at local colleges and correspondence courses along pertinent lines.⁵ The manager of the small office evidently finds it simpler and cheaper to detail a trusted employee to teach specific duties to a new member of the secretarial staff.

In fifteen cases the small office placed its secretarial staff under the control of the office manager. The writers on business management make no specific recommendation on this score, although some state that in many offices the secretaries are assigned to work for specific executives and are not a part of the general office staff.

No firm among the smaller concerns questioned taught its executives how to dictate, although such an authority in the field of business management as Lee Galloway

⁴Boyd, op. cit., p. 71.

⁵Galloway, op. cit., p. 527.

recommends such a step as a method of securing greater letter writing efficiency.

The majority of the little offices relied wholly on the use of shorthand in dictation. The elaborate dictating machines described in textbooks on business management are in all probability too expensive to be felt necessary in the small office.

Textbooks on business management usually describe a situation involving the employment of a mail clerk. The small office conformed to this situation in eight instances. In seven cases the secretary and in four the manager was responsible for the correct handling of the mail.

The practices taught by textbooks and the practices in use in small offices were in conformity in regard to checking on the mail for the authorities advanced no specific method as ideal, and seventeen firms made no attempt to check on the efficiency of their letters. This seems to be a matter for individual expediency.

The managers of various small concerns demanded a use of such non-secretarial machines as Marchant machines, adding machines and check-writers in a few scattered instances, indicating duties added to the regular work of the secretary rather than a consistent demand on the part of small concerns that its secretary be very adept with office machines. The textbooks on management indicate that if much business requiring a given machine is done

by a concern it is a wise policy to employ a trained operator. Most small concerns conformed to this practice.

The textbook advised prospective office managers to plan to assign members of the secretarial staff to work for certain executives and to assist at specific duties in order to secure greatest saving in time. Small offices do not adhere to this practice according to the questionnaire, for managers of nineteen companies reported that each secretary undertook whatever came to hand.

Although the textbooks had advised students of business management to be conversant with the proper way to issue manuals, it was learned from the answers to the questionnaire that only seven offices actually required that the office compose manuals. Fourteen managers were required to issue reports which is in accord with textbook information which instructs the student of management to be prepared to issue reports.

3. The managers of small businesses agreed somewhat with textbook information in answering the first question on filing. Ten concerns, which was a majority of those questioned, used the alphabetical file which is described as the commonest system in use. Seven other concerns used subject filing systems, which the textbooks describe as a "complicated system of filing."⁶

⁶See Page 51 of this study.

Both the writers on business management and the managers of small offices agree that an intelligent young person can be trained to handle the files accurately without any previous specific training in office work. This was the second question.

The third question asked if it was always the policy of the firm to use women for filing clerks. Such a policy is recommended by authorities in the field of management.⁷ Fourteen managers conformed to this policy. Six other offices asserted that they tried to employ the person best suited for the work regardless of sex. The reasons given for favoring employment of women as file clerks when such was the case, were similar to those advanced in the textbooks when they advised the use of women for such work.

The textbooks listed a number of filing problems, careless filing, loss of materials from the files, tardiness in filing material, not treating filed material as confidential information, proper location of files, disposal of old material. The business managers interviewed found that careless filing provided their chief problem, one naming tardy filing and another naming loss of materials as additional problems. Nine felt that their files presented no problems at all, which presents a happier picture of this technique than those provided in the

⁷Galloway, op. cit., p. 157.

available studies on office management.

Ten small firms opened their files to the entire office force and ten made them available only to certain authorized persons. The last ten operate their files in harmony with recognized practice according to textbooks, which tend to recommend that the files be closed except to executives of the firms or a group of responsible employees.

All twenty managers interviewed were able to keep their filing program within its budget. Such a procedure is strongly advised by writers on management. Likewise, all managers felt that their files were used to such an extent as to justify their upkeep, which is described as a criterion of a successful filing system.⁸

The last question on filing asked whether the small concerns found it practical to use a filing clerk who devoted her time exclusively to that one activity. Ten firms did so and ten divided the work of the file clerks with other duties. The textbooks had offered no information on this situation since the amount of work to be done would determine the extent of the need for the services of a file clerk.

4. The textbooks listed the manager as responsible

⁸ See Pages 57 and 58 of this study.

for the appearance of the office.⁹ Thirteen office managers agreed that he should assume this responsibility, but the other seven laid the responsibility in five cases on the shoulders of the janitor, in one case upon an executive, and in another case upon the reception clerk.

The textbooks advise the prospective manager to be acquainted with a number of business machines beyond those which he could be expected to master as an operative. The experience of these twenty office managers is in full agreement with such advice, for they listed fifteen machines besides the typewriter as being used in their respective offices.

The managers were also following the practice advised by the textbook in regard to a maintenance policy for eighteen went on record as having such a policy, which is advised by the textbooks as the only satisfactory procedure by which to insure the proper upkeep for complicated machines.

Similarly, the small offices conform to the conditions which the student is led to expect in regard to inter-office communications, for they employed a variety of methods of communicating within the firm itself.

Fifteen concerns followed the advised procedure of setting up a small and flexible expense budget to cover necessary supply purchases.

⁹Neuner and Haynes, op. cit., p. 362.

Two concerns did not follow ideal procedures in having maid and janitor service available at all times. Two other concerns did not measure up to the standards desired by their managers and described by the textbooks as necessary to good health among the office force in regard to sanitary provisions for their workers. Writers urge that office managers insist on good working surroundings as conducive to efficiency if for no more humane reasons.

Although the textbooks had stated that the petty cash drawer could be useful if properly handled, only three firms used it in the conduct of their activities.

In thirteen instances the managers followed the advice given to prospective managers by teachers of business management. In twelve other instances, they did not follow the advised procedure. In the remaining instances, no definite comparison could be made for one of these reasons: (1) because the textbook advised no procedure; (2) because half the firms followed one course and half a directly opposite one; (3) because the question was not answered by all the managers concerned. In no case were the practices of all the firms questioned directly opposed to the course recommended by the authorities on the subject.

Recommendations

From the results of this questionnaire, it is possible to draw certain conclusions, which will serve as recommendations to the student of business administration or the prospective graduate from such a course.

First, the larger towns of the state offer positions in managerial work in a number of different types of business and varied sizes of offices.

Second, while all managers of small offices recognize the essential nature of training, they also place a very high value on experience in office work as a factor in successful management. Therefore, the man or woman who would succeed in this work with maximum speed and ease should become conversant with some phases of it in his under-graduate days if possible, so as to shorten the inevitable apprenticeship which awaits him upon graduation.

Third, all experienced office managers consider the capacity for leadership the most essential personal characteristic of the successful manager. The young man who wishes to succeed in this field should develop a positive attitude in his thinking habits and an aggressively cooperative manner in his dealings with others. Further, he should endeavor to absorb all the training that is offered him in his preparatory schooling since good training is ranked second among personal factors which make for managerial success.

Fourth, even though a young person with ambitions in the field of business management does not intend to do actual filing work nor secretarial work, he will do well to make himself very familiar with the best observances in these fields, so that he may give a satisfactory account of himself as office manager by obtaining only the highest type of work from those under his supervision.

Fifth, while the young would-be office manager is employed in a lower capacity, he should study the disciplinary problems of the office from the employee's viewpoint so that when he later acts in a managerial capacity he will have a sympathetic and cooperative attitude in handling these problems. The maintenance of a cooperative attitude between manager and employee was ranked first among the necessary techniques of office management by the men who were actually functioning in supervisory capacities.

Finally, the young person interested in employment in this particular field should keep alert to the progress being constantly made in the production of office machines and furnishings. He should also weigh office arrangements and routines, so that he may store away in his memory any details which might be of use to him later when the arrangement of an office is his responsibility.

Recapitulation

The managers of twenty small offices cooperated with the writer of this study in answering a questionnaire concerning the problems of management which the student of business management must expect to solve when he is responsible for the efficient conduct of a small office in an average Texas city. The findings of the questionnaire reveal by comparison to statements found in textbooks on business management that academic research and the experience of the managers of small local offices are in agreement that a young person interested in this work must master four techniques; namely, the cooperation of staff personnel, the establishment of an efficient secretarial procedure, the use of an adequate filing system, and the study of the problems of purchasing and of office welfare, if he wishes to succeed in the field of office management.

A P P E N D I X

A QUESTIONNAIRE FOR OFFICE MANAGERS

Descriptive Questions

1. What type is your office? General _____ Special
(as credit or advertising) _____ (Check one)
2. How many employees are there in your office? _____
3. Is there a recognized manager? Yes _____ No _____
(Check one)
4. For what kind of business does this office function?
(For example, mercantile, insurance, advertising,
government, manufacturing, education, etc.) _____
5. Evaluate numerically these features of office efficiency:
 - a. Cooperative personnel _____
 - b. Workable filing system _____
 - c. Good secretarial staff _____
 - d. Enjoyable and convenient surroundings _____

Questions on Office Personnel

1. Number 1, 2, and 3 the training you consider preferable
for a prospective office manager:
 - a. A thorough college course in Business Administra-
tion with a minimum of experience _____
 - b. Lots of experience, but little academic train-
ing _____
 - c. Training after work in specific skills at com-
pany's expense or instigation _____
2. Number in order of importance the characteristics you
consider most essential for successful office super-
vision:
 - a. Leadership _____ b. Foresight _____ c. Honesty
 - in dealing with force _____ d. Good basic train-
ing _____
3. Does your company have an employment office? _____
Does the manager choose his own force? _____
Does your company have some other method of selection;
if so, what? _____
(Check one)

A QUESTIONNAIRE FOR OFFICE MANAGERS (CONTINUED)

4. I have listed the following qualifications of a good woman office worker. Will you rate by 1, 2, 3, 4 the ones you consider most essential?
- | | |
|----------------------------------|--|
| Courtesy | Good health |
| Accuracy | Dependability |
| Attractive appearance | Initiative and judgment |
| Technical preparation | Interest in work |
| Personality | Profitable use of time after work |
| Loyalty | Native intelligence, tact and memory for faces |
| Ability to get along with others | |
5. Does your company adopt the same policy toward men and women in regard to salary, absence, promotions?
 Yes _____ No _____ If not, why not? _____
 _____ (Check one)
6. Does your office staff include highly skilled machine operators? Yes _____ No _____ (Check one) If so, please name machines used. _____
7. Is the bookkeeping force in the general office?
 Yes _____ No _____ (Check one) Under whose supervision? _____
8. Do you handle grievances by (a) Routine consultation between manager and employee _____ (b) Employee's committee with usual spokesman _____ (c) Discuss troubles man to man when employee is dissatisfied _____ (Check one)
9. Which of the following problems has to be met most often in your office? (a) Lack of technical ability in worker (as in transcription) (b) Bad feeling among office force (c) Too much "grapevine gossip" about supervisors, customers' policy, etc. (d) Absenteeism (e) Jealousy over salary, promotions, etc. (f) Tardiness (g) Stupidity or bad training in handling machines (h) Clock watching (i) Any other _____ (Underline one)
 Have you found a method to overcome this problem; if so, how? _____
10. Is it the policy of your company to give more extensive training to its force while on the job? Yes _____ No _____ Do you train and use understudies? Yes _____ No _____ (Check one)

A QUESTIONNAIRE FOR OFFICE MANAGERS (CONTINUED)

Questions on Secretarial Procedure

1. Does your office have a definite mechanical style required for each type of letter? Yes _____ No _____
(Check one)
2. Do you plan a training period for a new stenographer
(a) under a veteran employee _____ (b) by giving
types of letters as models to be studied alone _____
(c) give your own instructions _____ (Check one)
3. Are the secretaries in your concern under the management of the general office? Yes _____ No _____
(Check one)
4. Do you have any program of teaching dictation to the executives? Yes _____ No _____
5. What system of transcription is used in your office?
Notes _____ Dictaphone _____ More complicated machines
_____ (Check one)
6. Who has charge of the outgoing mail in your office?
(a) Mail clerk _____ (b) Manager _____ (c) Each
executive for his own mail _____ (d) Each secretary
_____ (Check one)
7. Have you any system of checking on the efficiency of your letter-writing system? Yes _____ No _____
(Check one) If so, what? _____
8. What machines are used in your secretarial program besides the typewriter? _____
9. Does each stenographer handle (a) whatever work the day brings or (b) do your stenographers have special types of letters as their responsibility (as grievance letters, introducing new products, etc) (Underline one)
10. Does your office issue any manuals? Yes _____ No _____
If so, what kind? _____
Does your office issue any reports? Yes _____ No _____
If so, to whom? _____

A QUESTIONNAIRE FOR OFFICE MANAGERS (CONTINUED)

Questions on Filing

1. What method of filing is used in your office? Simple alphabetical _____ Subject _____ Geographical _____ Chronological _____ (Check one)
2. Have you a training program for the filing clerk? Yes _____ No _____ (Check one)
3. Is it your policy always to hire a girl or a woman for a filing job? Yes _____ No _____ (Check one)
Why? _____
4. What problem, if any, has arisen in regard to your filing system? (a) Loss of files to other departments _____ (b) tardy filing _____ (c) careless filing _____ (Check one)
5. Are your files available to the entire concern? Yes _____ No _____ (Check one)
If so, has any problem arisen over return of materials? Yes _____ No _____ (Check one)
6. Does the cost of file upkeep stay within budget? Yes _____ No _____ (Check one)
7. Are your files really used enough to justify their upkeep? Yes _____ No _____ (Check one)
8. Do you have an employee whose specific job is filing? Yes _____ No _____ (Check one)

Questions on General Physical Surroundings

1. Who is responsible for appearance and upkeep in your office? (a) The manager _____ (b) Some high executive _____ (c) Apparently only the janitor _____ (Check one)
2. What machines are in use in your office? (a) Typewriters (b) Adding machines (c) Dictaphone (d) Dictograph (e) Mimeograph (f) teletype (g) Bookkeeping (h) Hectograph (i) Billing (j) Addressograph (Underline those in use). Any others? _____

A QUESTIONNAIRE FOR OFFICE MANAGERS (CONTINUED)

3. Is there a clear maintenance policy in regard to machines so that any employee can refer to the proper repair people immediately? Yes _____ No _____
(Check one)
4. What office-to-office communication facilities do you use? (a) Messenger (b) Telephones (c) Others _____

(Underline communication facilities in use)
5. Is the office manager given a budget to cover flexible expenses such as paper, repair work, supplies? Yes _____ No _____ (Check one)
6. Are sanitary provisions for heat, light, rest rooms adequate in your office? Yes _____ No _____ (Check one)
7. Is janitor or maid service available? Yes _____ No _____ (Check one)
8. Is a cash drawer fund at the convenience of the office? Yes _____ No _____ (Check one)
What check is made on it? By (a) Cash register (b) Request to manager (c) Responsibility of a clerk
(Underline one)

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