

List of Files Produced in the Portfolio Builder

Excel Worksheets Produced (Possible Capstone Project)

Filename	Description
<i>[Your initials]</i> WorkSheetList.xls	Your worksheet list. A list of worksheets to include in your representational portfolio.
<i>[Your initials]</i> Prospects.xls	List of prospective employers for use in targeting your worksheets.
10-15 worksheets	Worksheets listed in your worksheet list (your representational portfolio).

Additional Documents Discussed (Actual Job Search)

Résumé	
<i>[Your initials]</i> AppInfo.xls	Information for use in filling out employment applications.
Cover letter	
Thank you letter	
Contact log	



Portfolio Builder

OBJECTIVES

After completing this lesson, you will be able to:

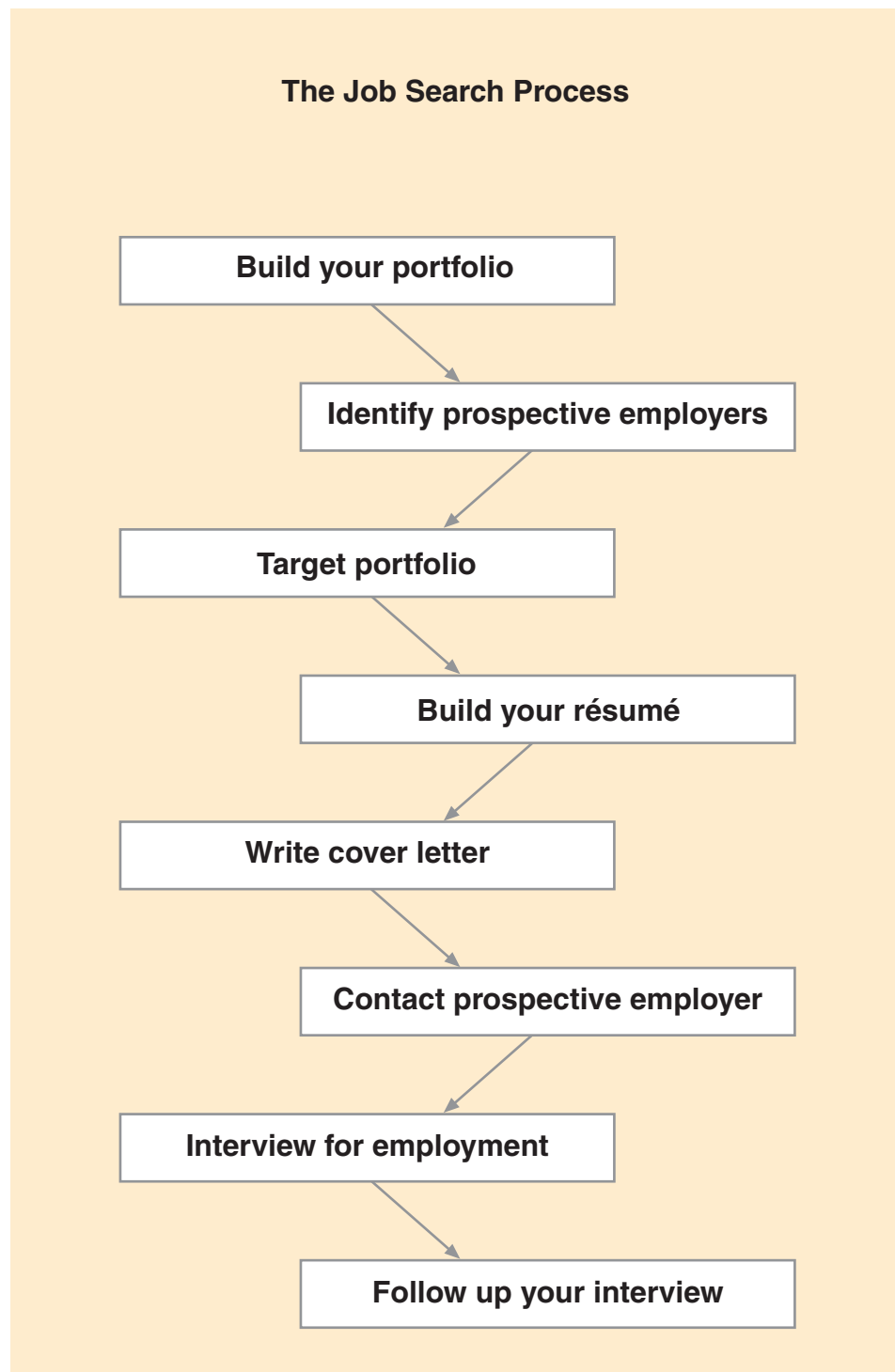
1. Create and adapt Excel worksheets for a portfolio.
2. Identify prospective employers.
3. Target your portfolio to a specific employer.
4. Feature your Excel skills in your résumé.
5. Fill out an employment application.
6. Prepare and present yourself at an interview.
7. Follow up an interview.

Finding a job is difficult—especially if the economy is bad or companies are downsizing. The number of applicants often exceeds the availability of jobs. It is important for you to distinguish yourself from other people interested in the same job. You need to show a prospective employer what you can do.

This Portfolio Builder helps you build a “representational portfolio”—a collection of your best work that you can show as evidence of your Excel skills. The worksheets in your portfolio will be geared to specific employers and could actually accompany a résumé and cover letter, or it could be brought with you to a job interview. Some instructors might use this representational portfolio as a capstone project for the course.

Objectives 4 through 7 of this Portfolio Builder lead you through an actual job-search process, including identifying and contacting prospective employers, filling out employment applications, presenting yourself, and following up after interviews.

FIGURE P-1
The job-search
process



The Portfolio Builder will be helpful to you if you're planning to search for immediate employment. However, Objectives 1 through 3 are also a useful final project, because it requires you to demonstrate skills you have gained over the entire course. Even if you're not looking for a job, it will help prepare you for an eventual job search.

Building Your Portfolio

While your résumé describes your experience and your skills, your portfolio actually demonstrates your skills by representing the best work you can do. It also should be work with which a prospective employer can identify—that is, worksheets that the employer will understand.

The first step in building your portfolio is to decide what types of worksheets belong in it. Use the following checklist as a starting point for creating a list of possible worksheets for your portfolio.

TABLE P-1

Possible Worksheets for Portfolio

WORKSHEET	COMMENTS
Stand-Alone Worksheets	Create attractive stand-alone worksheets
Worksheets with Charts	Create worksheets with embedded charts. Also create charts linked to worksheets on separate sheets.
Sales Invoices	Check Excel's Invoice template.
Balance Sheets	Check Excel's Balance Sheet template.
Expense Sheets	Check Excel's Expense Sheet template.
Loan Amortization Sheet	Check Excel's Loan Amortization template.
Time Sheets	Check Excel's Time Sheet template.
Profit & Loss Statements	Obtain information from annual reports available at your public or school library. Possibly include charts.
Lists	Create an Excel list. Show data filtered in multiple ways, with different views.



NOTE: Check Excel's General Templates (if they are not installed, you will need to install them). Also check the templates available from www.Microsoft.com.

EXERCISE P-1 Develop a List of Worksheets for the Portfolio

1. Develop a list of 10 to 15 worksheets for inclusion in your portfolio (see Figure P-2). Use Table P-1 as a checklist, and consider which worksheets would be appropriate for the specific type of job you're seeking. If you have work experience, list actual worksheets you have created. Use the following headings for your list:

Number Type of Worksheet Description

2. Save the list as *[your initials]WorkSheetList.xls* and print it.
3. Finalize your list by reviewing it with someone who is familiar with your job-search area. Adjust the list as needed. Save and print it.

FIGURE P-2 Sample list for student seeking accounting/clerk position

No.	Type of worksheet	Description
1	Invoice	For bookkeeping or accounting services
2	List	Client list, filtered in various ways, with different views
3	Accounts Payable	Client's Accounts Payable statement
4	Account Receivable	Client's Accounts Receivable statement
5	Employee List	Records of employees, including date hired, years employed (with calculations)
6	Purchase Order	For office supplies
7	Loan Statement	Showing principal, annual percentage rate, and so on
8	Check Register	Showing checks, deposits, and balance
9	Cash Flow Statement	Showing cash receipts and cash disbursements
10	Amortization Schedule	Showing various interest rates and payment periods
11	Income Statement	Showing cash, accruals, and net income

continues

FIGURE P-2 Sample list for student seeking accounting/clerk position *continued*

No.	Type of worksheet	Description
12	Balance Sheet	Showing assets and liabilities
13	Chart	Showing sales over a 12-month period, for a presentation or handout
14	Expense Sheet	Showing states shaded to reflect sales, for a presentation or handout
15	Grouped Worksheets	Grouped worksheets showing a three month period, with a summary sheet containing 3-D references.

EXERCISE P-2 Build Your Portfolio

It isn't necessary to begin every worksheet from scratch. In fact, it might not even be a good idea, because you already have developed many useful worksheets in the exercises in this class. Table P-2 lists those exercises in the text that might lend themselves most easily for use in a representational portfolio.

TABLE P-2 Possible Exercises for a Representational Portfolio

LESSON/UNIT	EXERCISES/APPLICATIONS*
Lesson 1	1-25
Lesson 2	2-26
Lesson 3	3-29
Lesson 4	4-35
Unit 1	U1-2, U1-3
Lesson 5	5-29, 5-30
Lesson 6	6-24, 6-25
Lesson 7	7-22, 7-23

continues

TABLE P-2 Possible Exercises for a Representational Portfolio *continued*

LESSON/UNIT	EXERCISES/APPLICATIONS*
Unit 2	U2-3, U2-4
Lesson 8	8-31, 8-32
Lesson 9	9-32, 9-33
Lesson 10	10-39, 10-40
Unit 3	U3-2, U3-3

* Many of the "On Your Own Exercises" are also suitable for use in a representational portfolio.

You also can use material from your other courses, adapt key material from any brochures and newsletters you receive from professional associations, or re-create sample worksheets obtained from people in positions similar to the one in which you are interested.

1. Create each of the worksheets on your list.
2. Adjust every worksheet to give it as professional an appearance as possible. Focus on formatting. Demonstrate the skills you learned in this course.
3. Consult the appropriate style reference for your profession to check that your formatting is acceptable.
4. Spell-check, save, and print your worksheets.
5. Ask someone familiar with your future profession to review your worksheets. Then modify them appropriately.
6. Save and print your worksheets again. Remember these worksheets should represent your best efforts.

Identifying Prospective Employers

Your next step is to identify prospective employers, starting with the companies in your area (and the people within those companies) that might be hiring people with your skills.

Always try to identify the manager in each company or organization who heads up the division, department, or group in which you hope to work. Avoid applying through a Human Resources staff member, if at all possible. In the Human Resources Department, it's easy to become just another applicant who receives no special attention.

Help-Wanted Ads

Help-wanted ads can be a useful way to research the hiring trends of a local company. Help-wanted ads are, however, less useful as a source of real employment opportunities. They should never be used as the primary focus of your job search. In fact, some experts believe that only 10 percent of all available jobs are listed in the newspaper.

Use back issues of your local newspapers to find out whether a company has been hiring recently, what kinds of jobs have recently been advertised, and who was listed as a contact person in the ad.

Networking

Talk to people who are in a position to provide information about job leads and the hiring process at particular companies. They can be friends, relatives, acquaintances—anyone who can put you in touch with a job contact. Try to identify the people within a company who have the power to hire you. Get the correct spelling of each person's name and their official correct job title, department, company, and, if possible, telephone number.

Company Research

An easy way to begin your company research is with the Yellow Pages. Use it to locate businesses in the field in which you're interested. (You might need to use the "Business-to-Business" section for some types of businesses.)

The business section of your local library contains reference books that can give you even more information about local companies. Some of the best sources are:

- *Standard & Poor's Register of Corporations, Directors, and Executives*. McGraw-Hill. (Volume 2 lists companies by location.)
- *The National Directory of Addresses and Phone Numbers*. Gale Research, Inc.
- *Million Dollar Directory*. Dun & Bradstreet.
- *Job Seeker's Guide to Private and Public Companies*. Gale Research, Inc.
- *Peterson's Job Opportunities. Business*. Peterson's Guides, Inc.
- *Peterson's Job Opportunities. Engineering and Computer Science*. Peterson's Guides, Inc.

Some of these sources are also available in easy-to-use software versions with which you can search for particular companies based on specific criteria. Your local librarian can often provide help in locating information about specific companies, as well.

Using the Internet

Many sources of company and career information are available on the Internet. Many companies operate their own Web site or home page, and some even list their job openings there. If a prospective employer is a large company, search the Internet based on the company's name. Often, promotional materials from the company will indicate its Internet or Web site address. (Promotional materials from local companies are often available in your local public or school library.)

Many Web search engines (such as Google.com, Lycos.com, Excite.com, or Go.com) offer career-oriented services. Search for such general keywords as "career," "employment," or "job." A targeted search using more specific keywords might produce results more immediately useful to your job search.

You can also use your Internet browser to search for locations with appropriate keywords. For example, one recent search showed 600,000 matches for the keyword "career." Obviously, the more targeted your search of the Internet, the more useful it might be.

Specialized employment search engines on the Internet might prove useful. Because these services list jobs from across the nation (and around the world), they might be less useful for a local job search. A list of places to look for jobs on the Internet follows (remember that Internet options change rapidly, so this list might need to be updated and new options might be available):

- HotJobs
One of the most widely used Web-based job-search sites
www.hotjobs.com
- The Monster Board
Another well-established Internet job-search service
www.monster.com
- CareerBuilder (formerly CareerPath)
One-stop "mega job search" of 75 Internet job-posting sites
www.careerbuilder.com
- Headhunter (formerly CareerMosaic)
www.headhunter.net
- JobOptions (formerly E-Span)
www.joboptions.com

EXERCISE P-3 Identify Prospective Employers

1. Identify at least five prospective employers. They may be located anywhere but should represent the type of company for which you could imagine working.

2. For each prospective employer, obtain the name of a job contact. (This person would typically be a manager of the department, division, or group in which you would like to work.)
3. Key the list of prospective employers in a worksheet. Include the contact's name, department, company name, address, city, state, ZIP code, telephone number, and FAX number. Save the worksheet as **[your initials]Prospects.xls** and then print it. You'll use this list throughout the remainder of this Portfolio Builder.

Targeting Your Portfolio

So far you've a portfolio of worksheets that reflect something about you. Now it's time to target a specific company and tailor your portfolio, including your résumé, to that company.

EXERCISE P-4 Target Your Portfolio to an Employer

The job contact at your targeted company is likely to respond more favorably to your portfolio if you take the time to tailor it to the company. Doing so shows that you made an effort to learn about your prospective employer. It might also provide more conversational opportunities in a job interview.

1. From your list of five prospective employers, choose one as your target. Review the information you've gathered about the company. If you feel you don't have enough information, collect additional material. Ultimately, you should be very familiar with the company—and the position—you've targeted.
2. Review Table P-3.

TABLE P-3 Targeting Your Portfolio

TARGETING SUGGESTIONS

- Use the targeted company's name in worksheet titles and use the company's address in worksheets, where appropriate.
- Modify the contents of worksheets so they apply specifically to the targeted company.
- You may decide not to change some of the more specialized worksheet created for your class (other than to make any corrections your instructor might have recommended). Sometimes it's a good idea to let the targeted company know that the worksheet was submitted as a class assignment, especially if it relates to your chosen field.

3. Based on the checklist shown in Table P-3, modify the worksheets in your portfolio to increase their appeal to the targeted company.
4. Spell-check and save the portfolio worksheets.
5. Print the final copies of your portfolio worksheets. Use standard printer paper.



NOTE: If you are building your portfolio as a capstone project for your course, it is not necessary to go beyond this point. You can turn in your representational portfolio of 15 targeted worksheets. The following information is presented for students who might be constructing a representational portfolio for use in an actual job search.

Creating a Résumé

To present yourself properly to a potential employer, you'll need more than just a portfolio. You'll also need a résumé describing your education and work experiences and a cover letter that introduces you, expresses your interest in the position, and summarizes your credentials. (Many good books are available about developing résumés. You could also consult the Portfolio Builder in Word 2002: A Professional Approach by Deborah Hinkle.)

Your Excel skills should be a prominent feature of your résumé and cover letter. For example, if you interned at a company where you were required to prepare a monthly accounts-payable Excel worksheet, you might include the following line in your résumé:

- “Created monthly accounts-payable Excel worksheet, using VLOOKUP function and date math.”

Or, if you are a whiz at using Excel's graphics features, you might write:

- “Created weekly national sales report in Excel, showing state-by-state distribution as a pie chart.”

It is usually considered acceptable to include any worksheets produced for a previous employer in your portfolio, provided that they honestly represent examples of your work and provided that you change any proprietary or confidential information contained in the worksheets. It's best to indicate clearly on such worksheets that the data has been altered. This demonstrates your integrity.

Filling Out an Employment Application

Some companies require that every applicant, at every level, fill out an employment application. Other companies don't even use one. Generally, however, companies do use some form of an employment application. Whether you need to fill out such a form will depend on the company's internal personnel policies.

Often applicants are asked to fill out an employment application when they arrive at the company for an interview. To minimize stress in an already stressful situation, prepare for the employment application beforehand by creating a reference sheet that contains any information that might be included in the application and isn't found on your résumé. (Of course, you should refer to your résumé in filling out your employment application. Make sure to bring an extra copy for reference.)

Tips for Employment Applications

- Be as specific as possible when describing the position you are seeking.
- Be careful when listing a required salary. A salary that is too high might eliminate you for some acceptable jobs, and a figure that is too low might weaken your negotiating position. Sometimes it is better to leave this line blank.
- Be prepared to list dates (month and year) for the schools you have attended. Some applications might also ask for your grade-point average and your class rank.
- Be prepared to list the following information for your previous employers: address, telephone number, name and title of supervisor, start date and end date (month and year), and a description of your duties.
- If some questions are not applicable to the job you are seeking, it is usually acceptable to write "Not Applicable" next to the question.

EXERCISE

P-5

Create a Reference Sheet for an Employment Application

1. Review the "Tips for Employment Applications." Note any information that isn't covered by your résumé.
2. Key all information that you will need to fill out an employment application. Use any format that makes sense to you.
3. Save the file as *[your initials]AppInfo.xls* and then print it.

Preparing for Employment Interviews

After you have contacted a potential employer and scheduled an appointment to meet, you'll need to prepare yourself to make a good impression in person. No matter how good your résumé or credentials are, only the interview can, ultimately, land you the job.

The more interviews you go on, the better your interviewing skills will be.



NOTE: If possible, avoid scheduling an interview on a Monday, which is often the most hectic day in a business environment.

Preparing Yourself

- Confirm your appointment the day before, and make sure you arrive at the interview on time.
- Become as familiar with the company as possible. Read articles about the company, if they are available, or talk to people who are or have been employed by the company. It's always flattering to a prospective employer when an applicant appears knowledgeable about the company in an interview.
- Approach the interview with a clear mental picture of your capabilities and your job objective. Review your résumé immediately before meeting the prospective employer. Think positively.

Presenting Yourself

- Come to the interview equipped with copies of your résumé, your references, and any recommendation letters you have gathered. Have your portfolio on hand, as well as a notepad and a pen.
- Look your best. Your attire and grooming are critical to making a good impression. Dress neatly and professionally, in a manner that is appropriate to the company you are visiting. If necessary, get help in selecting an interview outfit from someone who is familiar with your prospective company's style of dress.
- Be yourself. Act as relaxed as you possibly can, sit in a comfortable position, and focus on the interviewer.
- Ask questions. Learn what you can about the job, the company, to whom (or to how many people) you'd report, and so on. If no job is available or the job opening is not appropriate for you, ask for recommendations about other people you might contact in the company.
- At the end of the interview, if you want the job, express your interest in it and be ready to explain why the company should hire you.

Frequently Asked Interview Questions

The following questions are frequently asked in interviews. You might want to rehearse your answers before the interview. Never offer negative or unnecessary information to an interview question.

- Can you tell me about yourself?
- Why should I hire you?

- What are your major strengths? Weaknesses?
- What are your short-term goals? Long-term goals?
- Why do you want to leave your present job (if employed)?
- Why did you leave your previous job?
- What do you enjoy most (or least) about your current (or previous) job?
- Why do you want to work here?
- What salary do you expect to receive?

Following Up the Interview

To be successful in the interview process, you should take two important follow-up steps:

- Send a thank you letter.
- Keep track of your contacts.

Thank You Letters

Always send a thank you letter within 24 hours after you've interviewed with someone. It creates a positive impression, shows that you have good follow-up skills and appropriate social skills, and reminds the person of your meeting.

The letter should be short and friendly, thanking the person for his or her time and for any information he or she might have provided. You might want to mention something that reminds the person of who you are, in case many people have interviewed for the position.

Even if you know that the interview will not lead to a specific job offer, a thank you letter demonstrates your professionalism.

FIGURE P-3 Sample thank you letter #1

Dear Ms. Jones:

Thank you for the opportunity to interview for the sales position. I enjoyed meeting you and appreciate the information you shared with me.

I am very interested in the position and believe I could quickly become a productive member of your sales team.

Thanks again for the interview, and I look forward to hearing from you.

Sincerely,

FIGURE P-4 Sample thank you letter #2

Dear Ms. Jones:

Thank you for the interview and the information you gave me yesterday. I really appreciate your recommendation that I meet with John Doe in the Marketing Department.

I have scheduled an interview with Mr. Doe and look forward to meeting him. If this contact eventually leads to a job offer, I will be most grateful.

Thanks again for your time and help.

Sincerely,

Keeping Track of Contacts

Be organized in your job search. Create a contact log worksheet to keep track of everyone who has received your résumé.

FIGURE P-5
Sample format for
contact log

Date Sent	Contact Name	Company	Telephone	Comments

In addition, develop a system for organizing your contacts so you can follow up with telephone calls as appropriate. You can use your contacts worksheet for this, as well.

Name Your Name

Date 10/1/00

Comments

Students: Attach a Comments form to every document you include in your portfolio. In the Student Comments section describe the skills and techniques you demonstrated in the document. Also note any especially useful techniques and suggest how new techniques might have been used in earlier documents or in other settings. Your peer reviewer (a fellow student) and your instructor may also write comments on these forms when your portfolio is reviewed.

Document Number / Filename	Type of Document	Description	Revised?
(Sample) 1.g17-18	Memo	Memo with tabbed columns, sorted text, and bar tabs.	Yes 10/15/00

STUDENT COMMENTS

Skills Demonstrated

Had no problems with tabbed columns or sorting text. Had to look at the textbook for help with bar tabs, but I don't have any problems with them now.

Techniques to remember

Have to remember how to do bar tabs.

EVALUATOR COMMENTS

Peer Reviewer MKS

Date 10/13/00

Watch out for spelling.

Teacher Evaluator DH

Date 11/1/00

Perfect final product. Nice job.

If you show me this document with leader tabs, a different type of box border, and the Gateway offices sorted by descending order, you can boost your grade.

