

# PA ENTERPRISE

DeskDemon's Magazine for Executive PAs, Office Managers and Secretaries

January 2025

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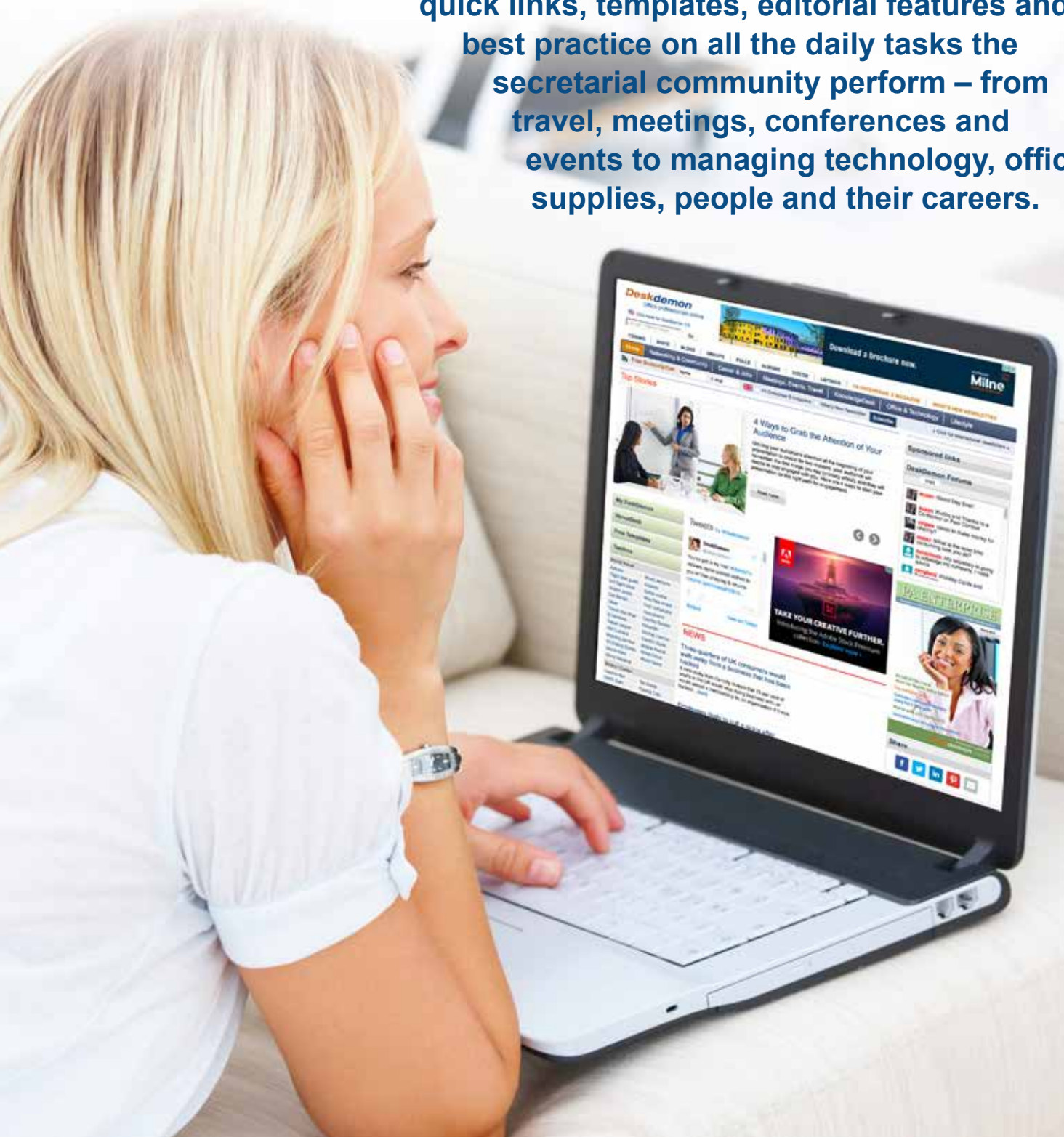
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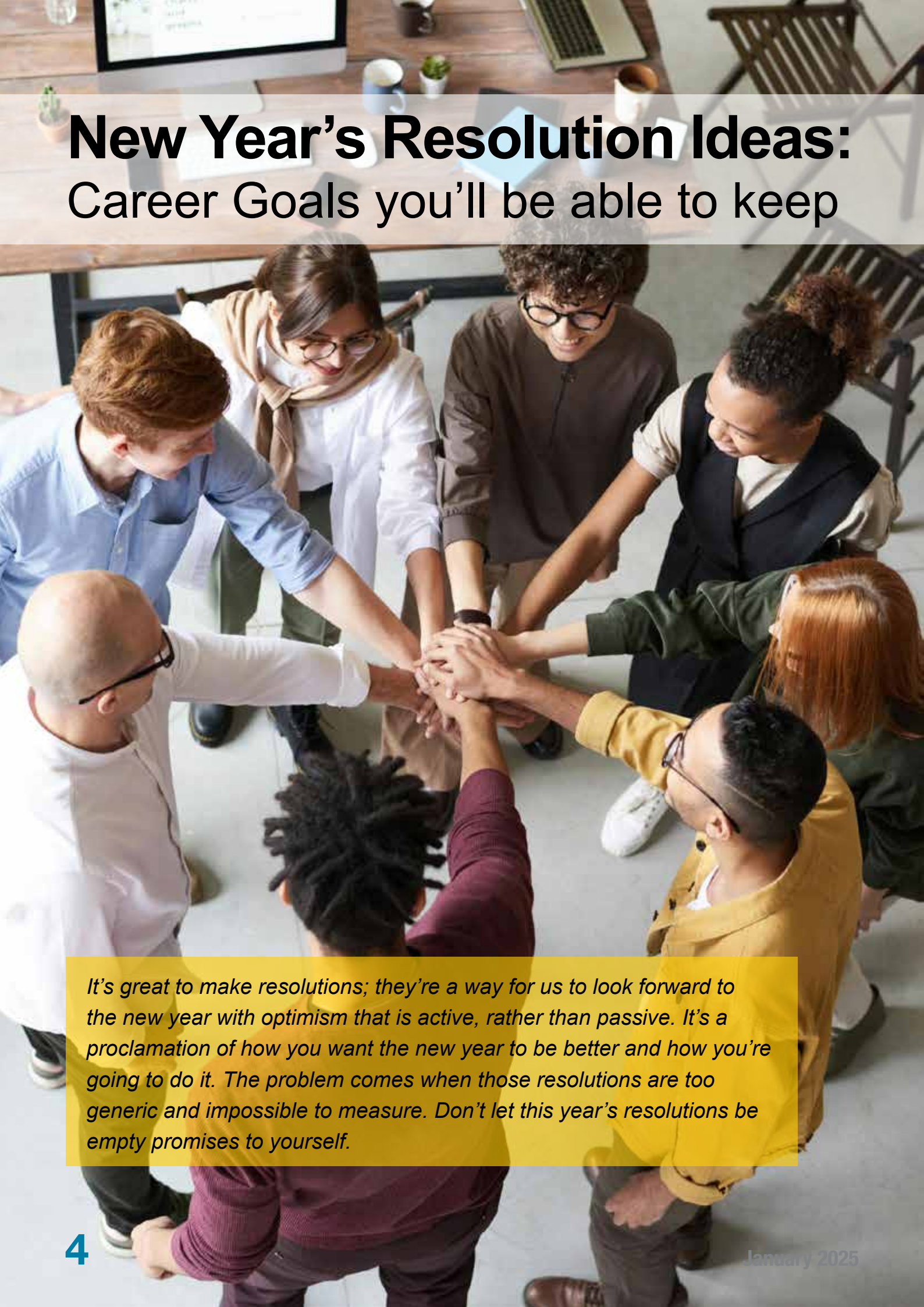
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# New Year's Resolution Ideas: Career Goals you'll be able to keep



*It's great to make resolutions; they're a way for us to look forward to the new year with optimism that is active, rather than passive. It's a proclamation of how you want the new year to be better and how you're going to do it. The problem comes when those resolutions are too generic and impossible to measure. Don't let this year's resolutions be empty promises to yourself.*

**T**his year, look at your career and set some firm, measurable goals that you can actually track and achieve. Here are 17 workplace goals for the new year that will make it your best work year ever.

### **Do five things to stay healthier at work**

Everyone is concerned about health, and losing weight is one of the most common New Year's resolutions out there. You spend a lot of time at work, so consider what you can do for your health while you're there. Try to think of five simple ways to stay healthier at work. Pack a sensible lunch. Take the stairs. Get up and stretch every hour. Test out a standing desk. Switch your office chair for an exercise ball. Think small and you'll find that those little things add up.

### **Learn a new skill**

No matter what field you are in, there are hundreds of new skills you can learn that could benefit your career. Is there one you've been meaning to learn? Set it as one of your work goals for the year and get it done. You won't regret it. If it can enhance your work in your current job, your company might even be willing to pay for it!

### **Read one career-related or motivational book**

Reading does wonders for your mind. No matter your job, there is a book out there that can improve your performance, your outlook, or your personal habits. Even if you think you already know what you need to know, reading a great book on professional development can give you a new perspective.

### **Update your resume**

When is the last time you gave your resume

a thorough look-through? Is the style of your resume modern and still current? Is the information correct? Make it a work goal for the year to review and edit your resume, even if you don't plan on applying anywhere. It's always best to update your resume periodically before you lose track of the information you need.

### **Create at least one new professional networking connection per month**

There's no downside to increasing the size of your professional network. You probably meet people all the time, but do you take the time to listen, grab their business card, and connect with them? Try to find at least one person per month to add to your LinkedIn connections and watch your network blossom.

### **Review and improve your LinkedIn profile**

Speaking of LinkedIn, how does your profile look? In the professional world, LinkedIn is crucial to your overall personal brand. Just like your resume, you need to keep the information, tone, and look of it up to date. Check out some of your connections' profiles and see if they're doing anything different that positively grabs your attention. If so, tweak your page to create a similar effect. If you don't have a LinkedIn profile or want help writing a winning LinkedIn profile for your job search, consider investing in TopResume's LinkedIn Makeover service.

### **Clean out your physical and digital file cabinets**

This New Year's resolution idea can double as one for home too! Many of us have file cabinets that are filled with old papers that are not remotely relevant to our work anymore. It



doesn't take long to clean them out, and you'll be glad you did. Weed through those files, recycle what you don't need, and organize the rest. This goes for your computer files, too.

### **Sign up to follow one relevant blog**

There is a world of free information, insider tips, and great motivational writers online. Find a blog that you enjoy, whether it's specific to your industry or just someone who puts a little pep in your step, and sign up to follow it. Don't know where to find one? Ask around the office. If you find one your co-workers like, it also becomes a topic for conversation. Win-win!

### **Find a work mentor**

The right mentor can be a powerful tool to propel your career forward. Is there a person at your company – someone who is a step or two above you – who you highly respect? Don't just look up to them. Ask if he or she is willing to be your work mentor. It works best if it is a recognised relationship between the two of you. Set workplace goals together for the new year and have a little fun while you're at it.

### **Get a new professional headshot**

If you cringe every time you look at your profile photo on LinkedIn, then consider the new year to be a great time to invest in a new one. Depending on your career goals and the type of company culture you like best, your profile photo may be casual or professional in its nature. The key is to select a photo that is high quality – at least 400 x 400 pixels, no larger than 8MB in file size, and does not exceed 20,000 pixels in height or width. Most importantly, you want a picture that truly represents who you are both personally and professionally.

### **Send at least one thank-you note per month**

Sending a handwritten thank you is a great way to show your appreciation and professionalism. It feels good, too! Buy a box of thank-you notes that you like. Then, each month, think of someone who did something nice for you. It could have been a LinkedIn recommendation, an introduction to a valuable networking connection, a free lunch, or a small, kind gesture at the office. Even if it's not related to work, sending a thank you to your mother-in-law for the soup she made when you were under the weather will make you feel good about yourself – and that positivity will show in your work.

### **Join a professional organisation**

Yes, professional organisations usually cost money. However, the benefits you can receive from the connections you'll make and what you can learn is often well worth the cost. Look for one that is focused on your favorite part of your career and check out any conferences they hold. A good conference can help you expand your network significantly and boost your work energy for weeks. Not sure how to find a professional association that's right for you? Start by finding out which groups your colleagues and managers are active in. You can also check out resources like Meetup, 10times, and the Directory of Associations for more options.

### **Measure your work-life balance**

We all hear about work-life balance, but how do you measure it? The first step is deciding that you want to see where you are at. Look over your results and maybe discuss them with your family and friends. With the survey results and the feedback of your loved ones,



you can start working towards finding harmony in your work and personal lives.

### **Volunteer**

Volunteering has many benefits and is a great way to positively affect the world, and it's also another way you can feel good about yourself. Find a cause that is meaningful to you and sign up to contribute. You can feed the homeless, pick up trash in a park, raise money for a new local pool, whatever you like. If you really want to step up your game, see if you can get your office to make an official event of it and recruit co-workers to volunteer with you.

### **Get one new professional certification**

Is there an empty spot on your resume where you wish you could put "XXXX Certified?" Stop wishing and make it happen! This is a great idea for one of your work goals for the new year as it can advance your career. If it costs money, just think of it as an investment in your

future. You can do this!

### **Clean out your email inbox**

Just like that file cabinet, your email inbox is probably flooded with old, useless emails. But there are also some in there you can't lose. Organize your email files, sort those emails, and delete what doesn't need to be there anymore. You'll feel a little bit lighter every time you log in.

### **Attend one professional networking event**

Networking events are a great opportunity to meet other professionals in your industry that live in your area. You get to make new connections as well as stay on top of what's happening in your field. Of course, networking events are not comfortable for everyone, so you don't have to attend them every week. But it is a good idea to put yourself out there at least once per year so you can reap the benefits of these professional gatherings.

# Future Work Trends: Workplace Predictions for 2025

*The future of work and the workforce as a whole has undergone major shifts in recent years, and 2025 is expected to be no different. As employees and employers prepare for the New Year, business leaders are making predictions about workplace trends. AI literacy continues to dominate the workplace predictions for 2025, along with other trends like mental health and workforce management.*



## Predictions About AI Literacy

- **A major investment in AI-literacy.** “Even if workplaces haven’t purchased GenAI tools yet for their employees, people will use these tools in their personal life and employers will have to offer some upskilling to deal with misinformation, IP loss protection and other potential threats to the business,” according to Vijay Pendakur, author of *The Alchemy of Talent*.
- **Integration of AI in HR processes.** “AI transforms HR functions by automating routine tasks and providing data-driven insights,” Paul Wolfe, human-first leadership advocate and former CHRO at Indeed, told me by email. “HR leaders should invest in AI technologies to enhance efficiency and support strategic decision-making.”
- **Balancing technology and growth in HR.** Cheryl Swirnow, Founder of CMS Consultants, predicts that as AI transforms HR in 2025, it’s essential to balance efficiency with the human connection that fosters employee trust and engagement. “While AI streamlines processes, adaptable upskilling programs are essential to help employees thrive in evolving roles,” Swirnow explains. “By blending technology with personal growth, HR can create a dynamic, future-ready workplace.”

## Predictions About Mental Health

- **Employee well-being and mental health.** “Prioritizing employee well-being is essential for maintaining engagement and productivity,” Wolfe says. “Implementing programs that support mental health and promote a healthy work-life balance can

lead to a more resilient workforce.”

- **Beyond traditional EAPs.** Swirnow notes that traditional Employee Assistance Programs often fall short in addressing complex mental health needs – especially during the winter months. “Organisations will shift to personalized mental health initiatives that integrate holistic wellness and cater to diverse workforce needs,” she predicts.

## Predictions About Workforce Management

- **Workforce classification and compliance.** “As companies hire globally and tap into the gig economy, proper classification of employees versus contractors will become a critical focus,” Swirnow notes. “Misclassifying workers can lead to significant legal and financial penalties, especially as labor laws vary widely across countries. Many companies will need HR’s guidance on these distinctions as they expand their workforce models.”
- **Workforce as a community of skills.** Lucy Beaumont, talent management solution lead for SHL, believes that companies will view their workforce as a community of skills in 2025 instead of as static job roles. “This perspective allows organisations to harness and deploy skills fluidly, meeting dynamic business needs while supporting employee growth,” Beaumont points out. “To do this, organisations will need to create skill-based ecosystems where talent can be matched with opportunities seamlessly.”
- **Investments in teams.** “Teams are where the magic happens and organisations are beginning to take notice and create

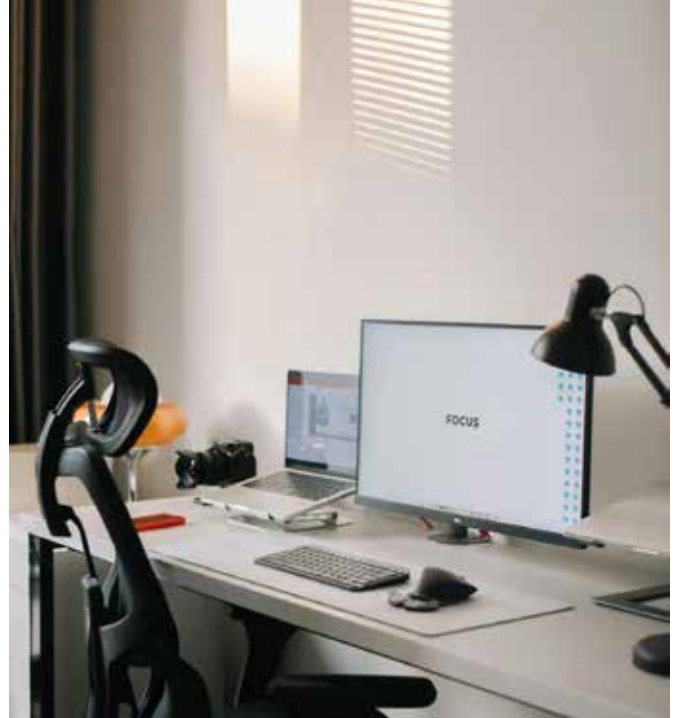
performance incentives for teams, team-level annual assessment, and even onboarding for whole teams,” declares Pendakur. “Team will shift from being a noun into a verb and teaming will become part of the way we talk about work.”

- **Global talent pool and workforce culture.**

“Many companies across industries like marketing, direct-to-consumer (D2C) goods and financial services are increasingly tapping into global talent pools,” Swirnow insists. “As such, HR will be expected to focus on cultivating inclusive cultures within diverse regions. A major focus will be on aligning handbooks and policies that reflect varied cultural norms and expectations, serving employees consistent experience, culture and support.”

- **Continued rise of employees with side-hustles.** Pendakur points out that fractional work, direct to consumer branding, and new social media tools have opened up space for millennials and Gen Z to develop viable secondary income streams, and employers will have to navigate what this means for employer brand, legacy notions of “loyalty” and potentially losing some part of your workforce to entrepreneurship.

- **Documentation and performance management.** Swirnow underscores that clear documentation is a key area of focus, especially for smaller companies navigating performance management and employee relations. “Proper documentation processes not only help companies stay compliant with employment laws but also ensure fairness in managing performance issues,” she states. “This trend could lead HR to creating accessible documentation processes and training managers on effective



communication.”

- **Return to office.** Wolfe believes that 2025 will be the year employers mandate that employees come to the office a certain number of days per week. “We have already seen this with Amazon (five days) and Starbucks (three days – which has been the request but now they will enforce it),” he predicts.
- **Beaumont believes skills that focus on sustainability will emerge as a trend for next year.** “As companies face mounting pressure to adopt sustainable practices, leadership development programs are incorporating skills like systems thinking, responsible innovation and environmental awareness,” she explains. “This trend could push the industry to redefine high-potential traits for future leaders.”

In today’s rapidly-evolving company cultures, trends like AI literacy, mental health and workforce management are among the many workplace predictions for 2025 that will impact our workdays in the New Year.

By Bryan Robinson, Ph.D.  
Author of *Chained to the Desk in a Hybrid World: A Guide to Balance.*

[www.forbes.com](http://www.forbes.com)

# Customers can't tell the difference between reviews written by AI or a person

Customers find it difficult to tell the difference between product reviews written by a person or ChatGPT, according to new research.

The researchers also found that AI-reviews were much more overwhelmingly positive, but these reviews were often less-detailed and more likely to include false information.

Researchers wanted to examine whether or not generative-AI tools, like ChatGPT, were able to create narratives that resonate with humans to a similar level that human marketers were – focusing on marketing content, such as social media posts, product reviews and ad copy.

To do so, three separate studies were conducted comparing generative-AI content to human-created content. The researchers focused on the sensory experiences of two products; whisky and chocolate.

The first study used a text analysis tool to compare AI-generated product reviews to human-generated reviews, finding that human-written content was more genuine, and less positive than AI-generated content.

Then, in the second study, the researchers used human raters to review the content too, as opposed to a text analysis tool, of which the raters came to the same conclusion.

In the final study, the researchers reviewed social media posts; of which half were branded content, and half unbranded. Some of the posts were written by ChatGPT, and some by human social media marketers – with

human raters reviewing the content, judged the sentiment of the post and reviewed the engagement too.

The researchers found that AI still struggles with creating rich, varied, and detailed content compared to humans. However, AI is effective at creating content with positive emotions and persuasive appeal, and can also be more convincing to customers when it comes to social media posts.

The researchers also found that ChatGPT 4 was much more effective than ChatGPT 3.5, when it came to creating effective and persuasive content.


“As generative AI tools like ChatGPT are increasingly used in marketing, they help automate tasks like crafting social media posts and responding to customer comments, resulting in higher engagement and increased purchase intent.”, says Professor Wen.

“However, research shows that while AI-generated content can be effective, it still lacks the nuanced understanding and authentic voice that human creators bring to marketing, therefore human input is still needed in the process”.

The researchers state that these findings clearly show that aspects of a marketer's role that AI can be hugely beneficial in creating impactful content for their company. However, there are still clearly challenges around misinformation – such as ChatGPT inventing information – that need to be considered in the process.

# Office Taboos:

## Navigating unwritten rules in the workplace

A photograph of two women in an office environment. The woman on the left, wearing glasses and a grey shirt, is smiling and pointing towards the laptop screen. The woman on the right, wearing a light-colored jacket, is looking at the screen with a thoughtful expression. The background is softly blurred, showing office shelves and a plant.

*Navigating the workplace often requires an understanding of unwritten rules and customs known as taboos. These taboos vary across cultures, industries, and organisations, and failing to observe them can lead to awkwardness, misunderstandings, or damage to professional relationships.*

## Understanding Office Taboos

Office taboos are unspoken norms and customs that govern the behaviour of employees in the workplace. These unwritten rules can vary greatly across cultures, industries, and even individual organisations. While some taboos may seem arbitrary, they often serve important purposes such as maintaining a professional atmosphere, respecting boundaries, and fostering a sense of community.

Breaching an office taboo can lead to awkwardness, misunderstandings, or even damage to professional relationships. For example, interrupting a colleague during a meeting is considered a taboo in many workplaces, as it can disrupt the flow of discussion and show disrespect for the speaker. Similarly, discussing personal matters in the workplace can make colleagues uncomfortable and can be seen as unprofessional.

## Common Office Taboos

Here are some common office taboos to be aware of:

- **Interrupting colleagues:** Allow others to finish speaking before interjecting.
- **Discussing personal matters:** Keep private conversations out of the workplace.
- **Gossiping:** Avoid spreading rumors or engaging in negative talk about colleagues.
- **Using inappropriate language:** Maintain a professional tone in emails, meetings, and casual conversations.
- **Dressing inappropriately:** Adhere to the dress code and avoid revealing or distracting clothing.
- **Eating smelly food:** Refrain from bringing pungent or strong-smelling foods to the workplace.
- **Using mobiles excessively:** Limit personal cell phone use during work hours.
- **Taking credit for others' work:** Acknowledge the contributions of colleagues and give credit where it's due.
- **Micromanaging:** Avoid excessive supervision and allow employees to work autonomously.
- **Invading personal space:** Respect colleagues' physical boundaries and maintain an appropriate distance.

## Navigating Office Taboos

Navigating office taboos can be challenging, especially for new employees or those coming from different cultural backgrounds. Here are some tips for respecting and understanding these unwritten rules:

- **Observe and listen:** Pay attention to the behaviour of colleagues and listen to what they're saying. This can help you identify unspoken norms.
- **Ask questions:** If you're unsure about a particular behaviour, don't be afraid to ask a trusted colleague or mentor for guidance.
- **Be respectful:** Always treat colleagues with respect, even if you don't agree with their opinions or behaviours.
- **Adapt:** Be willing to adjust your behaviour to fit the culture of your workplace.
- **Avoid assumptions:** Don't assume that everyone shares the same values or beliefs.





- **Respect diversity:** Be aware that taboos can vary across cultures and understand that different perspectives may be present.

### Benefits of Understanding Office Taboos

Understanding office taboos can provide several benefits for employees and organisations:

- **Creates a harmonious workplace:** Respecting taboos can help create a more harmonious and respectful work environment.
- **Prevents misunderstandings:** Avoiding taboo behaviours can prevent misunderstandings and conflicts.
- **Builds trust:** Adhering to taboos shows that you respect your colleagues and the organisation.
- **Promotes professionalism:** Maintaining a professional demeanor in the workplace can enhance the image of your organisation.

professional demeanor in the workplace can enhance the image of your organisation.

- **Facilitates collaboration:** When colleagues feel comfortable and respected, they are more likely to collaborate effectively.
- **Boosts productivity:** A positive and respectful work environment can contribute to increased productivity and job satisfaction.

### Conclusion

Office taboos are an important part of the workplace culture. While they can be unwritten and sometimes difficult to understand, observing and respecting these norms can foster a harmonious and productive work environment. By understanding and navigating office taboos, employees can build strong professional relationships, avoid misunderstandings, and contribute to the success of their organisation.

# Workers ‘disillusioned’ by recent pay inflation

After a year of pay exceeding inflation, the tables seem to be turning on worker pay expectations as employers take stock of regulation and tax hikes. That’s according to the latest data from international recruitment expert, Robert Half.

Data from the firm’s latest Jobs Confidence Index (JCI) – an economic confidence tracker produced in partnership with the Centre for Economics and Business Research (Cebr) - revealed that 63% of workers are confident in their job security for the next six months. However, a slowdown in real wage growth and an eight-point drop in the pay confidence pillar of the Index indicates that the tide is turning for workers – with the power shifting back to employers.

Additional statistics from Robert Half further indicate a reversal in remuneration growth potential. According to its 2025 Salary Guide, 70% of workers are finding it more challenging to negotiate a pay rise compared to last year. Employees do, however, feel they deserve an increase, whether that’s due to the growing costs of living (39%), because they expect it every year (29%) or due to exceeding performance goals (25%)

Employers are seemingly less willing to further add to employment costs, focusing instead on improving productivity. Data from the firm’s 2025 Salary Guide revealed that 44% of businesses are planning to implement

automation and digital transformation to enhance productivity, while 40% are optimising workflow management.

According to Robert Half, with increases to National Insurance Contributions (NICs) also adding to financial pressures, it is less likely workers will get the pay rise they want in the New Year.

Matt Weston, Senior Managing Director UK & Ireland, at Robert Half commented:

“Workers have seen high wage growth in response to the cost-of-living crisis, which has led to a level of expectation among employees of continued pay rises. The reality, though, is that many firms simply can’t sustain this, particularly with NICs set to increase.

“Given that the UK’s productivity levels have remained stubbornly low, we are seeing a growing number of companies looking at ways to streamline current operations and better utilise resources. This is likely to continue until the economic climate settles from the recent upheaval we’ve experienced. However, that’s not to say that workers will lose out overall. The proposals in the Employment Rights Bill and a general recognition within the business community that advanced perks and benefits are a must in the modern world, mean that employees will reap the rewards beyond their pay packets.”

# Dealing with redundancy: Our guide on what to expect

*Losing your job can be tough. It can lead to job hunting stress and financial worries, amongst many other issues. Unfortunately, redundancy is something you might have to deal with at some point in your career, for any number of reasons. If you do find yourself in this situation, it's essential that you try not to take it personally. It's also vital that you know your rights.*



fortunately,  
we no longer need  
our services



**B**ecause redundancy isn't something most of us have to deal with very often, it can be extremely confusing to navigate. Here's a comprehensive guide to understanding redundancy and what it could mean for you.

### Redundancy and unfair dismissal

Being made redundant is a form of dismissal from your job. It might be that the company no longer needs your role or that it needs to reduce its workforce. There are a few reasons why this might happen, with some of the most common reasons including:

- A change in direction of the company, meaning it no longer requires your role.
- The company is failing and therefore needs to make cuts across the business.
- The company is being taken over or merging with another organisation.

It's important to note that your employer must be fair when selecting who they're going to make redundant. Sometimes organisations will ask whether anyone would like to take a voluntary redundancy, or they might operate a last-in, first-out policy. They may also select you if your disciplinary records or attendance aren't as good as others.

Because your employer must treat employees fairly, they can't dismiss you for discriminatory reasons such as age, gender or religion.

When dealing with redundancy, be sure to gather all the information surrounding the circumstances. If you feel your employer is dismissing you unfairly, head to your local Citizens Advice Bureau (CAB) for professional advice on what to do next.

### Redundancy consultations

Before you panic, employers can't just call you to their office one day, drop the bomb and move swiftly on. They'll need to set up formal redundancy consultations, where your boss will meet with you and explain the situation and why they're letting you go.

If more than 20 people are being made redundant at once, group consultations will take place. These are a bit more regimented than the independent ones. By law, a trade union or employee representative will be present at these meetings.

These consultations are also the point at which you'll receive your notice period; you can also raise any questions you have regarding your rights or pay.

### Notice of redundancy

After your employer has told you they're making you redundant, they will have to give you a notice period. Thankfully, they can't just tell you to leave!

Your notice period is the amount of warning you'll receive before your employment ends. Note that this period is dependent on the amount of time you've been at the company. Of course, your employer does have the choice to give you more warning than you're entitled to if they wish. This could give you longer to prepare for leaving and start finding a new job.

### Notice periods work as follows:

- If you've worked there between one month and two years, you have the right to at least one week's notice of redundancy.

- If you've been there for more than two years, you'll receive one week's notice for each year you've been employed for 2 – 12 years.
- If you've been at the company more than 12 years, you're entitled to 12 weeks' notice. This is the maximum time the employer has to give you. However, they can choose to give you more notice if they want.

### Voluntary redundancy

For some employees, dealing with redundancy may come as good news. In fact, employers can ask staff members to take voluntary redundancy in return for a financial incentive. This saves the employer having to choose who to let go.

Note that employers cannot simply offer this to older employees as an incentive to retire early – that would amount to age discrimination. Often, employers offer these types of redundancies to longer-standing or more senior members of the workforce.

If your employer suggests the option of voluntary redundancy, anyone can put themselves forward for it. This doesn't, however, mean that the employer has to select you. Ultimately, it's their decision who they let go.

### Alternative employment

If the company is changing directions or your role is no longer needed, your employer may offer you alternative employment. This means you'll have the option to stay with the company but working in a different role or department.

For example, while you may have a job in sales now, your employer might be able to offer alternative employment in its marketing

team if you have the right transferrable skills.

### Know your rights

If you do find yourself dealing with redundancy, it's important that you understand your rights, to ensure that the process is as fair and smooth as possible for both you and your employer.

If you find your employer is not acting fairly or you're not receiving the correct pay or notice, get in touch with your local legal authorities for advice.

### What is redundancy pay and will I receive it?

You could receive a severance pay package as compensation. However, you will only be eligible for this if you've worked for the company for at least two years. Pay is dependent on the age bracket you fall into. Statutory pay works as follows:

- If you're under 22, you're entitled to half a week's pay for each full year you worked at the company.
- Between the ages of 22 and 41, you'll receive a full week's pay for each full year you served at the company.
- After 41, you'll receive a week and a half's pay for every full year you worked at the company.

Length of service is capped at 20 years and if you were made redundant on or after 6 April 2024, your weekly pay is capped at £700.

Note that the maximum you can receive is £21,000. If you were made redundant before this date, these amounts will be lower.

## Exceptions to statutory redundancy pay

There are a few exceptions to statutory redundancy pay. even if you've been in employment with the company for more than two years. You won't receive this rate of pay if you are:

- Dismissed for misconduct (as this doesn't count as redundancy).
- An apprentice who will not have employment in the company at the end of their training.
- Offered another suitable role in the company or asked to stay on, but turned it down without good reason.
- A merchant seaman or share fisherman.
- Crown servants, members of the armed forces or police services.
- A domestic servant who is a member of your employer's family.

## Pay in lieu

Your employer can choose whether they want you to continue working through your notice period. If they decide they want your position to cease with immediate effect, you can still receive redundancy pay, but only if you've been there two years.

You'll receive a lump sum called 'pay in lieu'. The employer will work out how much you receive on the usual rates of statutory pay as above. Your employment with the company will then end immediately.

## Garden leave

Your employer could also ask you to take something called 'garden leave'. This is when you serve out the remainder of your notice period from home. While you're not working,

you're still an employee of the company and will receive your usual hourly rate.

This means, however, that your employer could ask you to go back to work at any point during this period. And, as they still employ you, you can't start another job in that time.

## Looking for work

The good news is, while you're serving out your notice period, you have the right to paid time off work to look for a new job. When you're dealing with redundancy, your employer must give you a reasonable amount of time off to look for another job or to start training for a new one.

However, your employer only has to pay you 40% of that week's pay for the time you take off. So, don't take it off just because you can – use it wisely!

## Act fast when dealing with redundancy

Being made redundant can be difficult, especially if it comes as a surprise. But unfortunately, you can't always avoid it. If you find out you're facing redundancy, make sure you know your rights!

If you need to, use online calculators to work out how much statutory pay you're entitled to. You can find these on official government websites.

If you do feel like you've been unfairly dismissed for any reason, don't let this stress you out. Seek advice from your local CAB or other online resources.

Most of all – don't panic! There are processes to follow and, above all, there are new jobs out there waiting for you!



# From VLOOKUP to SUMIF: Essential Microsoft Excel formulas

*Microsoft Excel is an essential tool in many job roles, from finance and marketing, to data analysis and administration. While Excel offers a vast array of functionalities, mastering just a few of its key formulas can significantly boost your efficiency and productivity.*



**Whether you're a beginner or looking to enhance your spreadsheet skills, here are 10 Microsoft Excel formulas everyone should know:**

### 1. VLOOKUP

VLOOKUP (Vertical Lookup) is one of the most widely used Excel functions. It searches for a value in the first column of a range and returns a value in the same row from another column.

**Function:** VLOOKUP(lookup\_value, table\_array, col\_index\_num, [range\_lookup])

#### How to use VLOOKUP:

- Select the cell you want the result to appear in
- Type =VLOOKUP(  
• Enter the value you want to search for (e.g., A2)
- Enter the range of cells to search within (e.g., B2:D10)
- Enter the column number from which to return the value (e.g., 3 for the third column)
- Specify TRUE for an approximate match or FALSE for an exact match (e.g., FALSE)
- Press Enter

### 2. SUMIF

SUMIF is used to sum values in a range that meet a specific condition or criteria.

**Function:** SUMIF(range, criteria, [sum\_range])

#### How to use SUMIF:

- Imagine you have a sales list where column A has product names and column B has sales figures
- To sum the sales of a particular product, use: =SUMIF(A2:A10, "ProductName", B2:B10)
- This adds up only the sales figures for "ProductName"

### 3. IF

The IF function performs a logical test and returns one value for a TRUE result and another for a FALSE result.

**Function:** IF(logical\_test, value\_if\_true, value\_if\_false)

#### How to Use IF:

- To assign a "Pass" or "Fail" based on scores in column A, use: =IF(A2>=50, "Pass", "Fail")
- This checks if the score in A2 is 50 or above and returns "Pass"; otherwise, it returns "Fail"

#### 4. INDEX & MATCH

INDEX and MATCH are powerful alternatives to VLOOKUP, offering more flexibility. INDEX returns a value from a specific row and column within a range, while MATCH finds the position of a value within a range.

**Function:** INDEX(array, row\_num, [column\_num]) + MATCH(lookup\_value, lookup\_array, [match\_type])

##### How to use INDEX & MATCH:

- First, find the position of a value with MATCH: =MATCH("ProductName", A2:A10, 0)
- Then, use INDEX to find the value in the corresponding row and a different column: =INDEX(B2:B10, MATCH("ProductName", A2:A10, 0))
- This combination returns the price of "ProductName" from column B

#### 5. CONCATENATE (or CONCAT)

CONCATENATE (or the newer CONCAT) joins two or more text strings into one.

**Function:** CONCATENATE(text1, [text2], ...) or CONCAT(text1, [text2], ...)

##### How to use CONCATENATE (or CONCAT):

- To combine first names in column A and last names in column B into a full name, use: =CONCATENATE(A2, " ", B2)
- This joins the first name and last name with a space in between

#### 6. TEXT

The TEXT function converts a number to text in a specified format.

**Function:** TEXT(value, format\_text)

##### How to use TEXT:

- To format a date in "DD/MM/YYYY" format, use: =TEXT(A2, "DD/MM/YYYY")
- This changes the date in A2 to the desired format

#### 7. SUMPRODUCT

SUMPRODUCT multiplies corresponding elements in arrays and then sums those products.

**Function:** SUMPRODUCT(array1, [array2], ...)

##### How to use SUMPRODUCT:

- If column A contains units sold and column B contains the price per unit, calculate total revenue with: =SUMPRODUCT(A2:A10, B2:B10)
- This multiplies each unit sold by its price and then sums the total

## 8. COUNTIF

COUNTIF counts the number of cells in a range that meet a specific condition.

**Function:** COUNTIF(range, criteria)

### How to use COUNTIF:

- To count how many times a specific product appears in column A, use: =COUNTIF(A2:A10, "ProductName").
- This returns the number of times "ProductName" is listed.

## 9. LEFT, RIGHT, MID

These functions extract a specified number of characters from a text string, starting from the left, right, or a specific position (MID).

**Function:** LEFT(text, [num\_chars]), RIGHT(text, [num\_chars]), MID(text, start\_num, num\_chars)

### How to use LEFT, RIGHT, MID:

- To extract the first three characters of a product code in A2, use: =LEFT(A2, 3)
- To get the last four digits of a phone number in B2, use: =RIGHT(B2, 4)
- To extract characters from the middle of a string, starting at the 2nd character and taking the next 4 characters, use: =MID(A2, 2, 4)

## 10. LEN

LEN returns the number of characters in a text string.

**Function:** LEN(text)

### How to Use LEN:

- To find the length of a product code in cell A2, use: =LEN(A2)
- This will return the total number of characters in that string

## Final thoughts

Mastering these Excel formulas will not only save you time, but also make you more effective in handling data – even if it isn't your main job.

Whether you're working with simple datasets or complex models, these functions provide a strong foundation for any Excel user.