Professional English in Administration and Finance



Primera edición, 2025

Autora: Mª Jesús Ortolá García **Maquetación:** Educàlia Editorial

Edita: Educàlia Editorial

Imprime: Grupo Digital 82, S.L. **ISBN**: 979-13-990944-7-3

Depósito legal:

Printed in Spain/Impreso en España.

Todos los derechos reservados. No está permitida la reimpresión de ninguna parte de este libro, ni de imágenes ni de texto, ni tampoco su reproducción, ni utilización, en cualquier forma o por cualquier medio, bien sea electrónico, mecánico o de otro modo, tanto conocida como los que puedan inventarse, incluyendo el fotocopiado o grabación, ni está permitido almacenarlo en un sistema de información y recuperación, sin el permiso anticipado y por escrito del editor.

Alguna de las imágenes que incluye este libro son reproducciones que se han realizado acogiéndose al derecho de cita que aparece en el artículo 32 de la Ley 22/18987, del 11 de noviembre, de la Propiedad intelectual. Educàlia Editorial agradece a todas las instituciones, tanto públicas como privadas, citadas en estas páginas, su colaboración y pide disculpas por la posible omisión involuntaria de algunas de ellas.

Educàlia Editorial, S.L.

Carrer Mestre Esteban Català, 2-bis, 46010 València

Tel: 960 624 309 - 610 900 111

E-mail: educaliaeditorial@e-ducalia.com

www.e-ducalia.com

Professional English in Administration and Finance



Mª Jesús Ortolá García



M	d	e	X

UNIT1

Welcome to company

UNIT 2

Communication at the work place

UNIT3

Adminitrative management & documentation

UNIT 4

Financial & **Commercial** documents

UNIT 5

Sales, marketing and promotion

UNIT 6

Accounting and banking

UNIT7

E-Commerce and digital business operations

UNIT 8

Global and trade logistics

UNIT9

Security in the workplace

UNIT 10

Leadership and career development

UNIT 11

Step into the job market: apply for a job

UNIT 12

Step into the job market: write a CV

· Soft skills

· Vocabulary review

BRUSH UP ON YOUR ENGLISH

Vocabulary	Grammar	Reading
Company structure Job positions	Articles and Quantifiers Present Simple &	Real-Case Study: The Nude Project
Around the Office: Rooms and Spaces	Continuous • Adverbs of frequency	Welcome Email
Business emails Telephone phrases and etiquette Postal communication Voicemail	Past Simple Past time expressions Used to	Real-Case Study: How to Use Corporate Communica- tion Channels
Office equipment and supplies Document types Office routine and collocations	Future forms: Will, present continuous and be going to	Real-Case Study: Staff Briefing
Pinvoices, Orders, and Payment Documents Pinancial Statements, Budgets, and Tax Documents	Comparative and superlative forms	Real-Case Study: Monthly Financial Report
Market researchPlanning eventsMarketing strategiesAdvertising	Present Perfect Time markers	Real-Case Study: Market Insights Report
Banking servicesMoney, Credit, and InvestmentInsurance	Past Continuous Past Perfect	Real-Case Study: Services Guide
 Digital Office Tools and Communication Online shopping Postal and Delivery Services 	Relative pronouns, Defining and non-defining relative clauses	Real-Case Study: Guide to Online Shopping Safely
Shipping and LogisticsImport and Export OperationsInternational Trade	The passive voice, some/any/no compounds	Real-Case Study: "How Goods Travel the World: From Factory to Buyer"
Health and workplace safetyWork LeavesDigital safety and scams	Conditionals (Zero to Third)	Real-Case Study: Workplace Safety Guidelines and Protocols
Human Resources and RecruitmentProfessional skillsThe career ladder	Modal verbs	Real-Case Study: A Day in the Life of a CEO
Academic qualificationsWorking conditions and skills	Reported Speech	Real-Case Study: job offers
Key skills and competences for employment Soft skills	Inversion and Emphasis Structures Indirect Questions	Real-Case Study: LinkedIn profile

· Indirect Questions

· Grammar review

news

Real-Case Study: Business

REAL WORLD SKILLS		Loosaina atationa		
Listening	Speaking	Writing	Learning stations	
First Day at Work: Orientation Email	Presenting Your Workplace	Introducing Yourself to the Team	• "Company Culture: Roles	
Arranging a Business Meeting	Answering and Making Phone Calls	Emailing Your Team: Event Details and Schedule	and Etiquette in the Workplace"	
Pass the message: Classifying Administrative Documents	Rescheduling a Business Meeting	• Formal email: Today's Briefing	"Write It Right: Taking	
Asking for the Right Document: A Call Between Departments"	Voicemail recordings	Payment Reminder Email	Professional Meeting Minutes"	
Marketing Team Meeting	Presenting a Marketing campaign to an Influencer	Creating an Advertising Brief	• "Planning a Brand Event	
Telephone Call to a Bank	Client–Banker Conversation: Opening a Business Account	Formal email requesting credit information.	for Influencers"	
Customer Service Call about a Delivery Issue	Requesting Help from IT	Blog Post on the Benefits of Digital Communication in Business	"Going Viral: How Start- ups Use Social Media to	
A Call with the Logistics Department	Email to Confirm an Order Shipment	Negotiating Shipping Terms	Grow"	
Safety Briefing	Requesting Time Off	Article Promoting Health at Work	"Stronger Together:	
Discussing manager's leadership styles	Recruitment Interview	Strategy Plan	Teambuilding for Health and Harmony at Work	
Job advice for interviews	Job interview	Cover letter	• "Click, Apply, Succeed:	
Tips on creating an effective CV	Presenting yourself on a networking event	• A CV	Online Job Hunting Strategies"	
Networking Event: Making Connections	Small talk	A company review	Common idioms and expressions in business English	

UNIT Welcome

to the company

- **Vocabulary and Professional Context**
- Use essential vocabulary to describe company structures, job roles, and office spaces.
- Communication in the Workplace
 - Introduce yourself and interact appropriately in a professional office setting through reading a welcome email, listening to an orientation message, speaking by giving directions around the office, and writing an introduction to the team.
- Language Use and Grammar
 - Apply articles, quantifiers, and present tenses to describe routines and current actions.

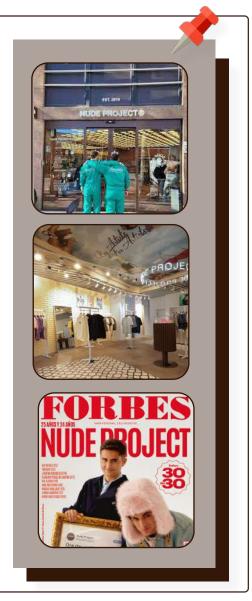
REAL CASE: Nude Project

The Nude Project is a premium streetwear brand founded in 2020 by Bruno Casanovas and Álex Benlloch. Their head office is located in the Poble Nou district of Barcelona, inside a converted industrial building designed as a creative workspace. The building includes several departments and divisions, such as marketing, finance, and human resources (HR), each with their own teams and supervisors.

The office layout features multiple **meeting rooms**, a large **conference** room, a podcast studio, a photography studio, and a café for the staff. There are also workstations arranged in an open-plan area to encourage collaboration. Employees and visitors enter through the main entrance, passing the reception area where the receptionist greets them. The building has a lift and stairs connecting the different floors, with a car park available for staff.

The Nude Project employs around 130 employees, including a CEO (chief executive officer), directors for operations, finance, and marketing, senior managers, line managers, consultants, accountants, administrative assistants, office clerks, sales representatives, trainees, and interns. The management team oversees the entire workforce and regularly organises training sessions to maintain high standards and motivate their team.

The company sells its clothing online and through physical stores in cities such as Madrid, Valencia, Lisbon, and Milan. Nude Project has a strong presence on social media platforms like Instagram, TikTok, and YouTube, using viral campaigns and collaborations with influencers to increase brand awareness and engage with their community.



1. Write True or False for each sentence. If the sentence is False, correct it using information from the case study.

	True	False
a) The head office of Nude Project is based in Madrid and includes a photography studio and a café.		
b) A receptionist is responsible for overseeing the workforce and managing internal promotions.		
c) The marketing director plays a key role in defining the brand's strategy on social media platforms.		
d) Interns are often recent graduates who join the company to gain practical experience.		
e) The company's sales representatives focus exclusively on online customer support.		



Real-World Focus: Search for Nude Project on social media. Then, prepare a short presentation or written report answering the following questions.

- Who are the founders, and what are their roles in the company?
- What is the main concept or brand identity behind Nude Project?
- What type of job positions or departments do you think are essential for their business?

2. Match the word with the correct definition.

Word

- 1. Department
- 2. Reception
- 3. CEO
- 4. Workstation
- 5. Supervisor

- **Definition**a) The person who oversees other employees or a small team
- b) A desk or area where an employee works
- c) A unit or section within a company focused on a specific area
- d) The area where visitors check in and are welcomed
- e) The person with the highest-ranking position in the company

CEO stands for Chief Executive Officer

3. Use words from the box to fill in the blanks.

hierarchy · lobby · ground floor photography studio · line manager

1.All vi	sitors must sign in at the	before being allowed into the offices.
	company's ensures clea onsibilities.	r reporting lines and role
3.	Employees usually meet theirexpectations.	during their first week to discus-
4.The shoo		content for campaigns and product
5.The	showroom is located on the	, right next to the reception area.



c) branch



VOCABULARY

COMPANY STRUCTURE

a) workforce

1. Read the sentences below. Each has one word in bold that is incorrect. Replace the bold word with the correct word from the vocabulary list.

department · hierarchy · supervisor role · staff · organisation chart

- a) The company's **staff** shows the structure and reporting lines of employees.
- b) Maria's *department* is responsible for overseeing and managing the work of her team.
- c) A *hierarchy* is the person who manages daily tasks and guides employees.
- d) Each employee must understand their *role* within the company to work efficiently.
- e) The *organisation chart* shows the different teams and their managers.

Choose the correct word from the options to complete each sentence about company structure.

a)	Our IT	is responsible for managing
	the compar	ny's digital tools and systems.

b) department

b) The company created a new	to
focus on international sales.	

a) division	b) colleague	c) team

c)	He was promoted and transferred to th	е
	in Barcelona.	

a) organisation	b) branch	c) head office

d)	The company's	i	increased	afte
	opening five new stores.			

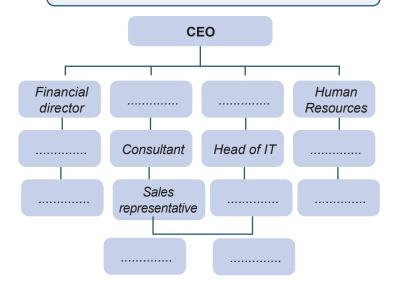
a) workforce	b) hierarchy	c) department



JOB POSITIONS

3. Use the words from the box to fill in the company organigram showing the structure of the clothing company.

Marketing Director · Operations Director · Financial Supervisor · Accountant · Administrative Assistant HR Assistant · Office Clerk · Receptionist · Secretary · Intern/Trainee



4. Match each job title with the correct responsibility. There are two extra options you don't need.

Job Role

A. Marketing Director

B. Receptionist

C. Financial Director

D. HR (Human Resources)

E. Administrative Assistant

F. Sales Representative

G. Office Clerk

H. Head of IT

Responsibility

- 1. Coordinates hiring, training, and employee welfare.
- 2. Manages brand campaigns and promotional strategies.
- 3. Assists with general administrative duties in the office.
- 4. Answers calls and greets visitors at the entrance.
- 5. Oversees company finances, budgets, and reports.
- 6. Sells products and builds relationships with clients.
- 7. Develops IT security policies and software updates.
- 8. Leads the design team and product development.

AROUND THE OFFICE: ROOMS AND SPACES

5. Match the office space with the correct description.

A. Conference room

B. Car park

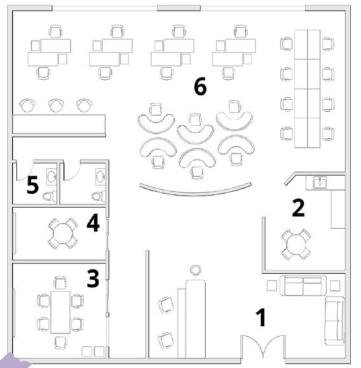
C. Stairs

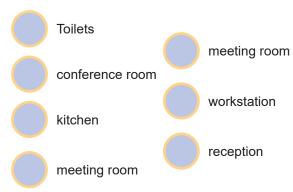
D. Lobby

E. Meeting room

- 1. ____ A large room equipped for formal discussions, often used for presentations and larger business events.
- 2. ___ An open space inside the building entrance, usually where visitors wait.
- 3. ____ A space outside or under the building where employees and visitors can leave their vehicles.
- 4. A smaller room used by teams to have private or regular work-related discussions.
- 5. ____ A structure with steps that allows you to go from one floor to another.

6. Look at the office floorplan and label the spaces using the words from the box. One word is extra.







Think and Share: Which room would you choose to meet an important client: the meeting room or the conference room? Why?

EXTRA FOCUS

- Imagine your ideal office.
- Draw or describe the layout and label at least five spaces from the vocabulary list (e.g. reception, lift, workstation...).
- Then share your plan with a classmate and explain your choices.





GRAMMAR

ARTICLES AND QUANTIFIERS

1. Fill in the blanks with the correct article (a, an, the) or quantifier

some · any · much · many · a few · a little

1) There is _____ meeting room next to

- the reception.

 b) We have employees working in
- b) We have _____ employees working in the marketing department.
- c) Can I have _____ water, please?
- d) There isn't _____ coffee left in the kitchen.
- e) She has _____ experience in project management.
- f) We need to order _____ chairs for the conference room.
- g) There is _____ printer in the corner.
- h) _____ company has a strict dress code.
- i) Do you have _____ questions about the training?
- j) I saw _____ new interns in the office today.

- 2. Find and correct the mistakes in the use of articles and quantifiers:
 - a) I need a advice about the new project.
 - b) There isn't many information available right now.
 - c) She brought an documents to the meeting.
 - d) We have a few employees who speak Spanish fluently.
 - e) There is some computers in the IT room.



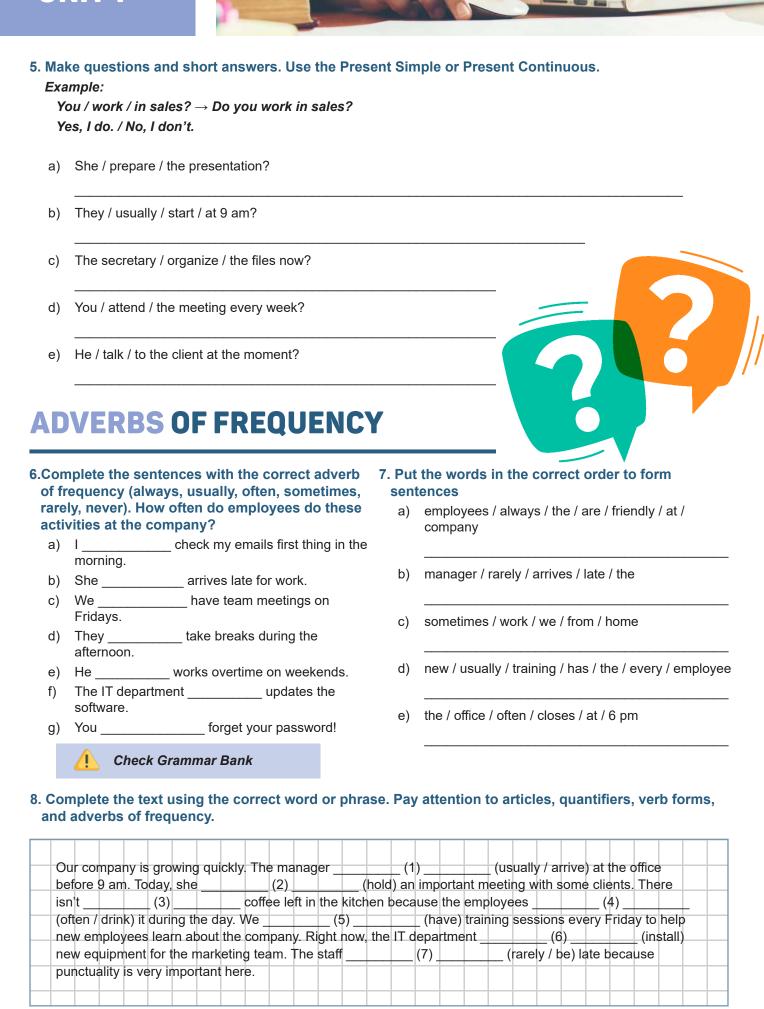
PRESENT SIMPLE AND CONTINUOUS

- 3. Complete the sentences with the correct form of the verb in Present Simple.
 - a) Emily usually _____ (start) work at 9 a.m. and checks her emails as soon as she arrives.
 - b) The office _____ (open) every weekday at 8 a.m., and employees ____ (arrive) shortly after.
 - c) Our team always _____ (have) a meeting on Monday mornings to plan the week ahead.
 - d) She ____ (not / like) to drink coffee in the morning, but she ____ (prefer) tea instead.



Real-World Focus: Take turns describing your daily routine before you arrive at the office using the present simple tense. Include actions like waking up, breakfast, commuting, and any other regular activities.

- 4.Choose the correct form of Present Simple or Present Continuous to describe what people usually do at the company and what they are doing right now.
 - a) The receptionist usually (answer / is answering) the phone in the morning.
 - b) Right now, I (write / am writing) an email to a client.
 - c) The marketing team (meet / is meeting) every Monday.
 - d) She (work / is working) on a new campaign this week.
 - e) We (not / use) that software regularly.
 - f) At the moment, the IT technician (fix / is fixing) the printer.
 - g) They (have / are having) lunch at the cafeteria every day.
 - h) Look! The manager (talk / is talking) to the new employee.





PRE-READING

REAL WORLD SKILLS



Think and Share: Getting Started at a New Job

- a) Have you ever received a welcome email or message when starting somewhere new (school, job, club)?
- b) What kind of information do you expect to find in a welcome email?
- c) Match these phrasal verbs with their meanings:

set up

find out

get on with

join in

- a) to join someone and start working with them
- b) to discover or learn something
- c) to have a good relationship
- d) to organise or arrange something



Phrasal verbs are verbs combined with prepositions or adverbs that change the meaning of the original verb

READING COMPREHENSION

WELCOME EMAIL



new.employee@stonebridge.co.uk

Cc

From hr@stonebridge.co.uk

Subject: Welcome to the Team – Important Information for Your First Day

Dear Emily,

I hope this message finds you well. I just wanted to say a big welcome to the team! We're really excited to have you join us at Stonebridge Communications.

On your first day please come to the main recention at 8:45 a.m., where our HR assistant will set

On your first day, please come to the main reception at 8:45 a.m., where our HR assistant will set you up with your ID card and access badge.

You'll be working closely with the marketing team, especially with James and Priya. They're both friendly and easy to get on with.

To help you get around the office: the marketing team is on the second floor (room 2B), the kitchen is next to the lift, and the meeting rooms are on the right when you come up the stairs. If you need to print anything, the printers are just across from the kitchen.

We're currently working on a big campaign, so there will be lots for you to do. Don't worry — we'll help you get used to everything!

Next Friday we're going out for lunch together to welcome you properly — feel free to join in if you'd like. It'll be a great chance to find out more about the company and your new colleagues.

Let me know if you have any questions.

All the best,

Sophie McAllister

Line Manager



- 1. Read the statements. Write T (True) or F (False). If the sentence is false, correct it with the correct information from the email.
 - a) Emily will receive her ID card directly from Sophie at 9:00 a.m.
 - b) The marketing department is located next to the kitchen.
 - c) Emily is expected to print materials before the first meeting.
 - d) The welcome lunch is optional, and it will take place during work hours.
 - e) Sophie thinks Emily will quickly adapt without any support.

2. Write the direct questions. Answer these questions with information from the text.

Example:		
✓ Where should Emily go when she arrives at the office	ce?	
a)	d)	
(Time / Emily / arrive / at the office)	(What / / for next Friday / event / is planned?)	
b)	e)	
(Who / she / work with / in the marketing team?)	(How / her / help / the team / get used to the job?)	
c)		
(Where / the printers / are?)		

3. Match the words on the left with their correct definitions on the right. Then write a sentence using three of the words related to your own experience or the text.

Word

- 1. lunch break
- 2. badge
- 3. colleague
- 4. orientation
- 5. printer

Definition

- a) A machine that makes paper copies of documents
- b) Time during the workday when employees stop to eat
- c) A person you work with in the same company or team
- d) A card or symbol that shows who you are at work
- e) The process of introducing new employees to the company or job



Real-World Focus:

In pairs, create a short dialogue where one person is welcoming a new employee and giving them advice using at least three of the words in bold from the text.



PRE-LISTENING

- 1. Match the words to their definitions.
 - 1. Reception
 - 2. HR Department
 - 3. Meeting Room
 - 4. Stationery
 - 5. IT Support
 - 6. Manager
 - 7. Office supplies

- a) Room for discussions with colleagues or clients
- b) Place where visitors arrive and ask for help
- c) Person in charge of a team or department
- d) Computers, printers and technology help
- e) Pens, paper, notebooks, etc.
- f) Human Resources they help with contracts and holidays
- g) Another word for office materials





LISTENING COMPREHENSION

FIRST DAY AT WORK: Orientation Message

2. Listen to the audio. Match the names of the employees to their job roles. Write the correct letter (A–E) next to each name.

1. LUIS

2. Ms KIM

3. THOMAS

4. JACK

5. Mr TAYLOR

A. IT technician

B. Junior analyst

C. Receptionist

D. HR manager

E. Emma's manager

- 3. Listen again and answer the questions below with as much detail as possible.
 - a) Who is Luis and what is his role at Brightwave Ltd?
 - b) What department is Ms Kim in, and what kind of help can Emma expect from her?
 - c) List three items that Emma can find in the break room.
 - d) Where can Emma find stationery and other office supplies?

4. What is Emma's attitude toward starting her new job, based on the conversation?



UNIT 1



Real-World Focus: Role-Play — Introducing the New Employee at the Office

The manager introduces a new employee to their coworkers. Each colleague briefly explains their role in the company and welcomes the new team member. After everyone has introduced themselves, the new employee asks questions to know more about his/her new job. Work with your partner(s) and practice the conversation at least twice, switching roles.

Roles:

- Manager
- New Employee
- Office Colleagues: Receptionist, Human Resources, IT Technician, Financial Analyst, Sales Team, etc.

Suggested Phrases:

Manager:

- "Good morning everyone, this is [Name], our new team member. [Name], let me introduce you to the team."
- "[Name] will be working in the [department]. I'm sure you'll all help her settle in."
- "Feel free to ask any questions as you get to know the office."

Coworkers:

- "Hello, I'm [Name] and I work in the [department]."
- "My role here is to [main responsibility]."
- "If you need help with [specific issue], you can come to me."

New employee:

- "Thank you all for the warm welcome."
- "Could you tell me more about [specific issue]?"
- "Who should I contact if I need help with [specific issue]?"





PRESENTING YOUR WORKPLACE

model dialogue

Mr Taylor (Manager) is introducing Emma, the new employee, to her colleagues and helping her find different places in the office.

Mr Taylor: Good morning, Emma! Let me introduce you to some of your new colleagues and show you around the office. This is the reception area where visitors arrive. Luis works here — he's the friendly face who greets everyone.

Emma: Nice to meet you, Luis! Could you tell me where the meeting room is? I have my first team meeting there next Monday.

Luis: Of course! From here, go straight down the corridor, then turn left at the end. The meeting room is just next to the kitchen.

Mr Taylor: Well explained, Luis. Emma, if you ever need to find the HR department, just ask me or Luis. They're located on the left side near the elevators.

Emma: Thanks, Mr Taylor. And where can I find stationery like pens and paper?

How to Mak for Directions

How to Ask for Directions:

- Excuse me, where is the marketing department?
- Can you tell me how to get to the HR office?
- Is there a printer nearby?

- How do I get to the meeting room?
- · Where can I find the kitchen?

How to Give Directions:

- It's on the second floor, next to the finance department.
- Go straight ahead and turn left at the end of the corridor.
- · Take the stairs/lift to the third floor.
- It's opposite the reception.
- The kitchen is just around the corner.
- Go past the meeting rooms and you'll see it on your right.

Mr Taylor: Good question. There's a cupboard near the photocopier. You can help yourself to anything you need.

Emma: Great! Also, where is the break room? I'd love to get a coffee.

Luis: The break room is just around the corner from the meeting room. It's a comfortable space with a fridge, coffee machine and some snacks. Perfect for relaxing during lunch.

Emma: That sounds lovely. And my desk?

Mr Taylor: Your desk is in the open plan area, just past the finance team. You'll be sitting next to Thomas, one of our junior analysts. He'll be happy to help you settle in.

Emma: I'm looking forward to meeting everyone. Thanks for the tour, Mr Taylor.

1. Pair Task: Introducing a New Employee



Work in pairs. Read the model dialogue aloud. Then, repeat the dialogue replacing the words in bold with other words or expressions from the unit.

2. Group Task: Office Tour Presentation

In groups of 3-4, create a map of your office including all the office spaces and departments seen in the vocabulary section. You can draw your map on paper or digitally.

Once your map is ready, each group will take turns acting as office guides for the rest of the class, who will pretend to be visitors new to the office. The visitors will ask for directions to different places using the questions and expressions from the scaffolding section.

3. Individual Task: Introduce Your Company to a New Intern

Imagine you are the boss of a company, and you have a new intern starting tomorrow. Your task is to prepare a short presentation to welcome the intern and explain the key parts of the company and who they will meet.

Use the chart below to organise your ideas and prepare your presentation. Then, practise speaking for about 2–3 minutes, introducing your company clearly and confidently.

-	Topic	Information to Include	Example Phrases
-	Welcome	Greet the intern and say you are happy they joined	"Welcome to [Company Name]! We're excited to have you with us."
	Reception Area	Who works there and what happens there	"Our reception is where visitors arrive. Sarah will greet you every day."
	Departments	Name main departments (HR, Finance, etc.)	"The HR department is where you will arrange your contract and holidays."
	Break Room	Facilities and when to use it	"The break room has a coffee machine and snacks; it's a good place to relax."
	Your Team	Who the intern will work with	"You'll work closely with the finance team and sit next to Emma, our junior analyst."
	Final Invitation	Encourage questions and show you are available	"Feel free to ask if you have any questions. We're here to help!"

WRITING

INTRODUCING YOURSELF TO THE TEAM



Objective: Write a short professional introduction, including information about your role, background, hobbies, experience, and expectations at work.

1. Read the following email carefully. Then, answer the comprehension questions orally in pairs or small groups.

Hello everyone,

My name is Lina Zhang and I work in the Marketing Department. I come from Beijing and I live in Madrid now. I speak English, Spanish, and Chinese.

I study Business Administration and I have experience in social media campaigns. I enjoy creating content and working with design tools like Canva. In my free time, I like reading, hiking, and visiting art exhibitions.

I want to learn more about **brand strategy** and I hope to improve my **communication skills**. I also want to meet new people and share ideas with the team.

I look forward to working with you all!

Best regards,

Lina

- a) What department does Lina work in?
- b) Where is she from, and where does she live now?
- c) What languages does she speak?
- d) What does she study?
- e) What hobbies or interests does she have?
- f) What kind of experience does she have?
- g) What does she want to learn or improve?





- I come from...
- I live in...
- I speak...
- I work in the ... department
- I study...
- I have experience in...
- Interests & Hobbies:
 - I enjoy...
 - I like...
- In my free time, I like to...



- I want to learn more about...
- I hope to improve my...
- I want to meet new people / share ideas
- I look forward to working with you all



- 2. Write a short email (70–90 words) to introduce yourself to your new team.
 Follow the model and include the following:
 - Your name and department
 - · Where you are from and where you live now
 - Languages you speak
 - Your studies or work experience
 - · Your hobbies or interests
 - What you hope to learn or improve