



Administrative Office Procedures

GLOBAL COURSEWARE

Getting Started

A well run office reduces miscommunications and helps to eliminate common errors.

Workshop Objectives



- Develop procedures
- Prepare checklists
- Understand succession planning



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You can't do today's job with yesterday's methods and be in business tomorrow.

Anonymous

The bottom of the image features a dark silhouette of a dense line of trees, likely evergreens, against the dark sky.

MODULE TWO

Why Your Office Needs Administrative Procedures

From catastrophes, to change, to basic day-to-day activities, administrative office procedures address them all when they are done correctly.



Business Continuity

- Develop a team and strategy to address the potential problems.
- Develop a plan and document each step before sharing it with the rest of the team.
- Test the plan using different methods such as drills, walkthroughs, and checklists.

Succession Planning

- Identify goals and objectives
- Identify needs in the company





Internal and External Audit Requirements

Internal and external audits are important for identifying risks that organizations face.

Internal and external auditors provide recommendations based on their assessments.

Recovery Planning

- Identify critical systems and prioritize them
- Determine strategies for data, technology, suppliers, people, and facilities



Practical Illustration



- Business Continuity
- Succession Planning
- Internal and External Audit Requirements
- Recovery Planning

Module Two: Review Questions

1. Business continuity is also called _____.

A. Business Strength

B. Business continuance

C. Business conformity

D. Business combination

Module Two: Review Questions

2. What is not an example of a risk?

A. Weather

B. IT

C. Sabotage

D. Functions

Module Two: Review Questions

3. What are profitability, employee loyalty, service, and productivity?

A. Goals

B. Needs

C. Trends

D. All of the above

Module Two: Review Questions

4. An aging workforce is an example of a _____.

A. Need

B. Goal

C. Trend

D. None of the above

Module Two: Review Questions

5. Which type of auditor works for the company being audited?

A. External

B. Internal

C. Neither

D. Both

Module Two: Review Questions

6. What is Not required of an auditor?

A. Objectivity

B. Independence

C. Reports

D. Leadership skills

Module Two: Review Questions

7. What is the first step in recovery planning?

A. Identify critical systems

B. Create instructions

C. Test the recovery plan

D. Create a plan

Module Two: Review Questions

8. What is the last step in recovery planning?

A. Identifying critical systems

B. Create instructions

C. Test the recovery plan

D. Create a plan

Module Two: Review Questions

9. Administrative procedures are important because_____.

A. The company's survival depends on them

B. The employees' retirement plans depend on them

C. Changes within the company can't take place without them

D. None of the above

Module Two: Review Questions

10. Which of the following is a risk a company could face?

A. Weather

B. Sabotage

C. IT

D. All of the above



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Give us the tools and we will finish the job.

Winston Churchill

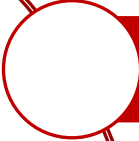
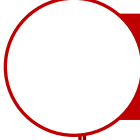
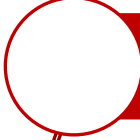
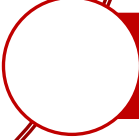
MODULE THREE

Gathering the Right Tools

Any activity requires the use of the correct tools, and the administrative office is no exception.



Binder

-  Lists
-  Locations
-  Checklists
-  Technology guides

Section Divider

Section dividers are used to break down the binder into different sections.





Sheet Protectors

Sheet protectors are necessary to keep the binder safe from accidents and spills.

Cover to Cover Binders

The information in the binder should be completely enclosed so that it is kept safe.



Practical Illustration



- Binder
- Section Divider
- Sheet Protectors
- Cover to Cover Binders

Module Three: Review Questions

1. Which of the following is Not a resource?

A. Contact list

B. Checklist

C. Job descriptions

D. Planning locations

Module Three: Review Questions

2. What is the first step in creating an administrative binder?

A. Choose a binder

B. Interview employees

C. Read job descriptions

D. None of the above

Module Three: Review Questions

3. What is useful as a section divider?

A. Folders

B. Tabbed sheet protector

C. Un-tabbed sheet protector

D. Multiple binders

Module Three: Review Questions

4. How do section topics vary?

A. Department

B. By leadership

C. By demographic

D. Organization

Module Three: Review Questions

5. Frequently used pages will require which of the following?

A. Tabbed sheet protectors

B. Heavy duty sheet protectors

C. Un-tabbed sheet protectors

D. None of the above

Module Three: Review Questions

6. Why not use sheet protectors on all pages?

A. Save money

B. There is not room

C. The binder would be bulky

D. It is easier to make changes

Module Three: Review Questions

7. What is the average size of a binder?

A. 1 ½ inches

B. 1 inch

C. 3 inches

D. 2 ½ inches

Module Three: Review Questions

8. What occurs when the binder is too small?

A. It is too difficult to organize

B. There is not enough room for the binder

C. Pages fall out

D. None of the above

Module Three: Review Questions

9. Being organized in the office will _____.

A. Eliminate confusion

B. Ensure proper procedure

C. A and B

D. None of the above

Module Three: Review Questions

10. The binder should include: phone lists, locations, and planning checklists.

A. Phone lists

B. Locations

C. Planning checklists

D. All of the above



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Almost all quality improvement comes via simplification of design, manufacturing... layout, processes, and procedures.

Tom Peters

MODULE FOUR

Identifying Procedures to Include

By keeping track of different tasks, working with other employees, and staying aware of daily activities, you will be able to find the best procedures.



Tracking Tasks for Some Days

- Determine which operations are executed as part of the position.
- Establish the tools that are used on a regular basis.
- Discover the information that is consulted consistently.

Reach Out to Other Employees for Feedback/Ideas

- Focus groups
- Meetings
- Questionnaires





Write Down Daily Tasks

Daily tasks should be recorded for a minimum of five days so that you can determine which tasks you actually complete on a daily basis.

Keep Track Using a Spreadsheet

It is important to keep track of which tasks are daily, weekly, monthly, annually.



Practical Illustration



- Tracking Tasks for Some Days
- Reach Out For Feedback
- Write Down Daily Tasks
- Keep Track Using a Spreadsheet

Module Four: Review Questions

1. What is not a way to track tasks?

A. Apps

B. Job description

C. Writing

D. Checklists

Module Four: Review Questions

2. How long should tasks be tracked?

A. Never

B. Weeks

C. Months

D. Days

Module Four: Review Questions

3. What is Not a method of feedback?

A. Tracking tasks

B. Survey

C. Meetings

D. Evaluations

Module Four: Review Questions

4. What needs to occur before feedback is collected?

A. Increase interest

B. Nothing

C. Prepare employees

D. All of the above

Module Four: Review Questions

5. What needs to be written down with the tasks?

A. Times

B. Skill level

C. Interest

D. Priority

Module Four: Review Questions

6. When should tasks be recorded?

A. As they happen

B. By the end of the day

C. Each morning

D. It does not matter

Module Four: Review Questions

7. Which tool is useful for keeping track of tasks?

A. Word

B. PowerPoint

C. Spreadsheet

D. All of the above

Module Four: Review Questions

8. Which task is most likely to be biweekly?

A. Emails

B. Phones

C. Payroll

D. Meetings

Module Four: Review Questions

9. If you put too much information in a binder, it becomes_____.

A. Too heavy to carry

B. Useless

C. Difficult to navigate

D. All of the above

Module Four: Review Questions

10. When determining which procedures to include,
_____.

A. Choose based on your
experience

B. Base it on your professional
experience

C. Collect feedback from
employees

D. All of the above



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Data beats emotion.

Sean Rad

MODULE FIVE

Top Five Procedures to Record

Using a template and writing detailed procedures will help ensure that the recorded procedures are accurate and effective.



Use a Template to Stay Consistent from Track to Track

Consistency can be difficult to attain when you are moving from track to track. Implementing the use of a template will develop consistency between tracked procedures.

Be as Detailed as Possible

When recording a procedure, you need to be as specific as possible. Provide every detail that you can.





Use Bullet Points Instead of Paragraphs

- Bullet points attract the attention of your readers.
- They are easy to use and provide basic, concise information.
- Each step should have its own bullet point.

Ask Someone to Execute the Procedure

- Were all of the instructions clear?
- Did you feel that any steps were missing?
- Were any of the directions confusing?



Practical Illustration



- Use a Template to Stay Consistent
- Be as Detailed as Possible
- Use bullet Points Instead of Paragraphs
- Ask Someone to Execute the Procedure

Module Five: Review Questions

1. What is not included in the template?

A. Goals

B. Job

C. Purpose

D. Regulations

Module Five: Review Questions

2. Accounting would fall under which of the following in a template?

A. Job

B. Category

C. Purpose

D. Regulation

Module Five: Review Questions

3. Instructions should be _____.

A. Long explanations

B. Exploratory

C. Short commands

D. Requests

Module Five: Review Questions

4. What should be done after recording steps?

A. Move to the next step

B. Nothing

C. Practice them

D. Review them

Module Five: Review Questions

5. What makes procedures easier to follow?

A. Bullets

B. Paragraphs

C. Tabs

D. All of the above

Module Five: Review Questions

6. What should have its own bullet point?

A. It does not matter

B. Each procedure

C. Each title

D. Each step

Module Five: Review Questions

7. What is important when testing procedures?

A. The instructions are written

B. It is unaided

C. They are observed

D. None of the above

Module Five: Review Questions

8. What is necessary after the instructions are tested?

A. Changes

B. Conversations

C. Feedback

D. Dialogue

Module Five: Review Questions

9. For the best results, it is necessary to limit yourself to how many procedures?

A. 10

B. 5

C. 15

D. 20

Module Five: Review Questions

10. What will develop consistency between tracked procedures?

A. Tasks

B. Costs

C. Nothing

D. Templates



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Diligence is the mother of good luck.

Benjamin Franklin

MODULE SIX

What to Include in Your Binder (I)

The needs of each organization will determine which topics you should include in the binder.



Phone Etiquette

- Answer by third ring
- Use hold appropriately
- Transfer calls efficiently
- Have a standard greeting

Business Writing

- Active voice
- Avoid jargon
- Proofread





Effective Time Management

- Prioritize tasks: Complete important tasks before the unimportant ones.
- Stop procrastinating: Identify procrastination and avoid it.
- Make a schedule.

Creating Meeting Arrangements

Providing a checklist to help create meeting arrangements will help ensure that nothing is overlooked.



Practical Illustration



- Phone Etiquette
- Business Writing
- Effective Time Management
- Creating Meeting Arrangements

Module Six: Review Questions

1. What determines the tone used on the phone?

A. Company

B. Individual

C. Topic

D. All of the above

Module Six: Review Questions

2. What is Not included in basic phone etiquette?

A. Standard greeting

B. Hold music

C. Tone

D. Answer on the third ring

Module Six: Review Questions

3. What should be used in business writing?

A. Passive voice

B. Subjunctive

C. Active voice

D. All of the above

Module Six: Review Questions

4. What type of language should be avoided?

A. Short sentences

B. Voice

C. Commands

D. Jargon

Module Six: Review Questions

5. What is Not a strategy of effective time management?

A. Make a schedule

B. Reviews

C. Prioritize tasks

D. Delegate

Module Six: Review Questions

6. Which task should be completed first?

A. Unimportant

B. Boring

C. Important

D. Difficult

Module Six: Review Questions

7. Which of the following is Not a task that you would include in a checklist?

A. Past meetings

B. Venue

C. Sleeping arrangement

D. Group size

Module Six: Review Questions

8. Which meeting is easier to plan?

A. Out of town meetings

B. Annual meetings

C. Company meetings

D. Weekly meetings

Module Six: Review Questions

9. What will determine which topics you should include in the binder?

A. The latest trends in organization

B. The organization's needs

C. The manger's needs

D. None of the above

Module Six: Review Questions

10. How long should you let the office phone ring?

A. Indefinitely

B. 4 rings

C. 3 rings

D. Never. Always direct a call to voicemail



Four small seedlings with two leaves each are growing in a row from dark, rich soil. The background is a soft-focus grey with bright, diagonal rays of light emanating from the top left, creating a hopeful and inspiring atmosphere.

“

A business that makes nothing but money is a poor business.

Henry Ford

MODULE SEVEN

What to Include in Your Binder (II)

Binders need to include basic policies that employees can easily consult if they have any questions.



Policy on Absences

- Define different types
- Notification requirements/procedures
- Emergency absences
- Requirements for punctuality
- Consequences

Breaks

Break policy should include lunches and short breaks along with specific times when they should be taken.





Salaries

- Wage increases based on performance
- Cost of living increases (Yes or No)
- The use of timesheets, timecards, etc.
- Overtime requirements/exempt and nonexempt employees
- Pay schedules

Benefits

- Holidays
- Leave
- Educational assistance
- Development and Training



Practical Illustration



- Policy on Absences
- Breaks
- Salaries
- Benefits

Module Seven: Review Questions

1. What is costly?

A. Employee absence

B. Policies

C. Procedures

D. Everything

Module Seven: Review Questions

2. What should be addressed with absences?

A. Job description

B. Nothing

C. Timing

D. Punctuality

Module Seven: Review Questions

3. Break policies prevent _____.

A. Illegal actions

B. Abuse by employees

C. Short breaks

D. None of the above

Module Seven: Review Questions

4. What should breaks comply with?

A. Company policy

B. Employee

C. Legal requirements

D. Nothing

Module Seven: Review Questions

5. Where would you find cost of living increases in the binder?

A. Breaks

B. Benefits

C. Salary

D. All of the above

Module Seven: Review Questions

6. What would not be included in the salary explanation in the binder?

A. Overtime

B. Timecards

C. Wage increases

D. Insurance

Module Seven: Review Questions

7. What may benefits overlap with?

A. Absences

B. Salary

C. Both of the above

D. None of the above

Module Seven: Review Questions

8. What information on benefits must be disclosed?

A. Length of coverage

B. Eligibility

C. History of benefits

D. None of the above

Module Seven: Review Questions

9. Break policy should include _____.

A. Lunches

B. Short breaks

C. Specific time

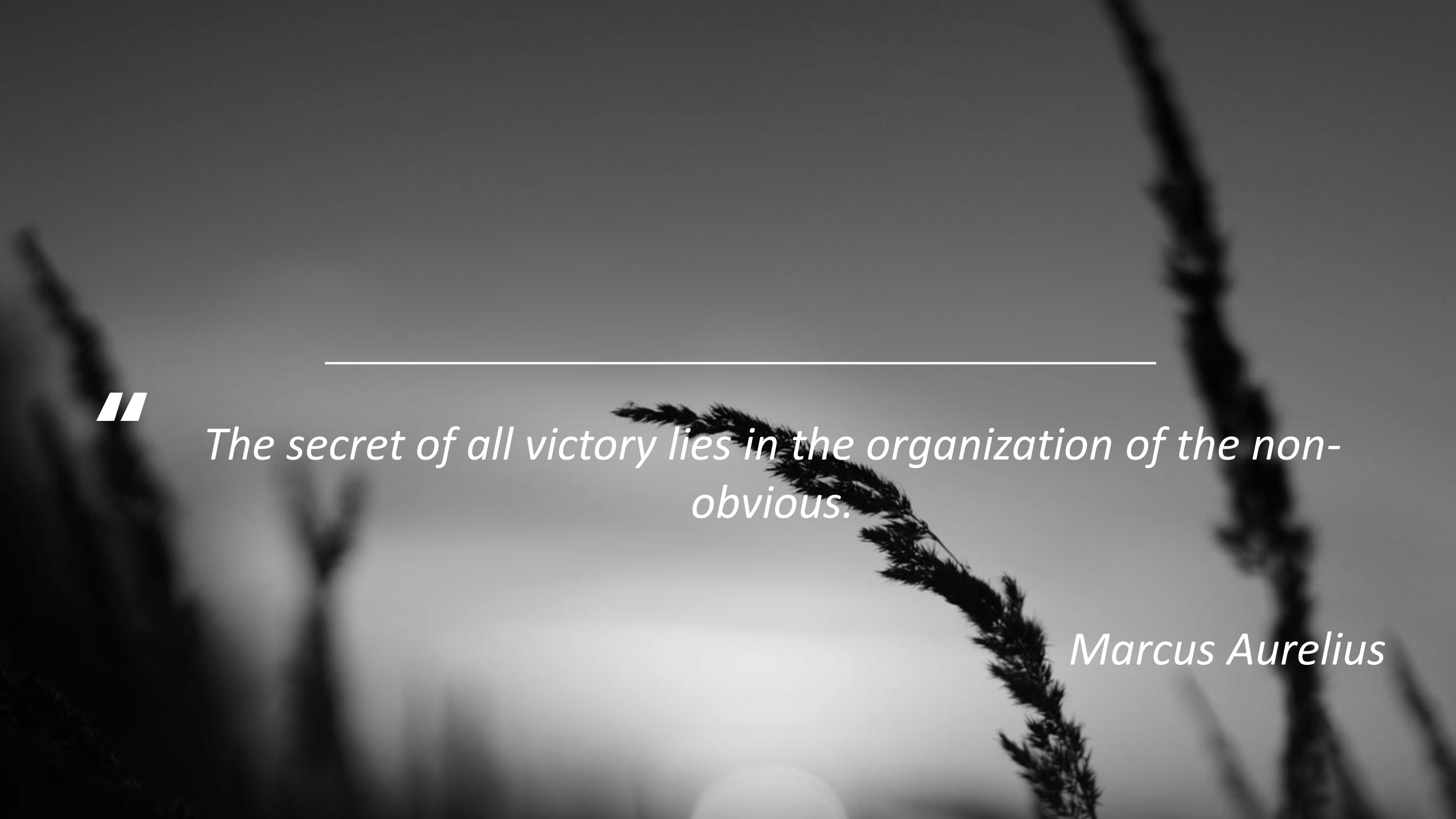
D. All of the above

Module Seven: Review Questions

10. Jury Duty is not considered an absence.

A. True

B. False



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The secret of all victory lies in the organization of the non-obvious.

Marcus Aurelius

MODULE EIGHT

Organizing Your Binder

Once the binder is put together, you need to keep it up to date and make changes as necessary.



Create a Table of Contents

The first step that you must take is to gather procedures you developed and organize them into broad sections of information.

List Each Section (e.g., Accounting)

- Accounting
- HR
- Contacts
- Events
- Calendar





List Procedures in that Section

Accounting

- Expense reports
- Profit and loss
- Payment processing

Keep Binder Updated with any New Changes

- Mark the printed pages when you notice that the information is inaccurate.
- Make the changes to the file and print it immediately.



Practical Illustration



- Create a Table of Contents
- List Each Section
- List Procedures in That Section
- Keep Binder Updated With Any New Changes

Module Eight: Review Questions

1. The table of contents is based on which of the following?

A. Procedures

B. Steps

C. Organization

D. Sections

Module Eight: Review Questions

2. What is useful when corresponding tabs with the table of contents?

A. Titles

B. Numbers

C. Names

D. None of the above

Module Eight: Review Questions

3. What needs to be listed before the binder can be organized?

A. Updates

B. Procedures

C. Sections

D. None of the above

Module Eight: Review Questions

4. What is Not included in typical sections?

A. Profit and loss

B. Accounting

C. HR

D. IT

Module Eight: Review Questions

5. What is done after listing procedures?

A. Review

B. Complete table of contents

C. Add tab

D. None of the above

Module Eight: Review Questions

6. In what order should procedures be listed?

A. Alphabetical

B. Importance

C. Appearance

D. It does not matter

Module Eight: Review Questions

7. Where would you note changes for the binder?

A. On a separate folder

B. On the pages

C. In a survey

D. You do not note changes

Module Eight: Review Questions

8. When should changes be made?

A. After meetings

B. At the end of the day

C. After a consultation

D. Immediately

Module Eight: Review Questions

9. When can policies be placed in the binder?

A. Once they are approved

B. Once they are tested

C. Once they are completed

D. None of the above

Module Eight: Review Questions

10. Before organizing information in the binder, you must ____.

A. Gather and organize it

B. Research and understand it

C. Understand and memorize it

D. Translate it into another language



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The enlightened ruler is heedful, and the good general full of caution.

Sun Tzu

MODULE NINE

What Not to Include in the Procedure Guide

Much of what needs to be avoided in the procedure guide is common sense. Passwords and any other confidential information must not be included in the binder.



Passwords

Only authorized personnel should be able to access the passwords. Determine who needs to access passwords and make sure that they know how to access the information.

Identify Other Confidential Information Via Your Employer

Like passwords, all confidential information needs to be kept out of all binders and manuals.





Store Information in a Separate Folder Outside of the Guide

When you must store confidential information, place it in a separate folder. The folder should be labeled carefully.

Find a Secure Location to Store

Lock it in a drawer or file cabinet that other people are not able to easily access.



Practical Illustration



- Passwords
- Identify Other Confidential Information via Your Employer
- Store Information in a Separate folder Outside of the Guide
- Find a Secure Location to Store

Module Nine: Review Questions

1. Where should passwords be stored?

A. Separate folder

B. Binder

C. In the desk

D. On the desk

Module Nine: Review Questions

2. What is necessary if passwords are saved on the computer?

A. Hide the computer

B. Change the network

C. Use a password

D. All of the above

Module Nine: Review Questions

3. What is Not an example of confidential information?

A. Date of birth

B. Social security

C. Credit card information

D. Accounting procedures

Module Nine: Review Questions

4. What should be done when you are not sure if information is confidential?

A. Ask

B. Do not use it in the binder

C. Secure the binder

D. All of the above

Module Nine: Review Questions

5. What is a good label for a folder of confidential information?

A. Administrative Information

B. Do not open

C. Confidential information

D. No label

Module Nine: Review Questions

6. Why choose an innocuous name for a folder?

A. Increase interest

B. Make it clear

C. Reduce interest

D. All the above

Module Nine: Review Questions

7. Where would you put a folder of confidential information in a drawer?

A. In the back

B. In the front

C. In the center

D. It does not matter

Module Nine: Review Questions

8. What does not need to be updated for security when storing files on a computer?

A. Malware detector

B. Virus barrier

C. Virus detection

D. Downloads

Module Nine: Review Questions

9. Who should have access to confidential passwords?

A. The IT specialist

B. Authorized personnel

C. Supervisors

D. All of the above

Module Nine: Review Questions

10. Passwords stored on a computer need to be_____.

A. Easily accessible

B. Password protected

C. Permanently locked away

D. Accessible by the manager only



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Extremists think 'communication' means agreeing with them.

Leo Rosten



MODULE TEN

Share Office Procedure Guide

Without the buy-in of key stakeholders, the procedure guide will not be a tool that gets much use.



Give Guide to Boss/Executive to Review

The procedure guide needs to be reviewed by your boss or the executive in charge of your department before it is implemented.

Inform Office Personnel of Procedure Guide

- Email announcement
- Meeting
- Presentations
- One-on-ones





Place Guide in a Visible Area

The guide needs to be placed in an area that is visible to all employees who will use it. The setting of the workplace will determine the best location for the placement of your guide.

Allow Office Personnel to Express Improvements/Updates if Needed

- Discuss the binder at weekly meetings
- Provide surveys
- Bring it up in one-on-ones



Practical Illustration



- Give Guide to Boss/Executive to Review
- Inform Office Personnel of Procedure Guide
- Place Guide in Visible Area
- Allow Office Personnel to Express Improvements/Updates if Needed

Module Ten: Review Questions

1. Why ask a superior to review the guide?

A. Find gaps

B. Give ideas

C. Change plans

D. You would not ask

Module Ten: Review Questions

2. How many times should you review the binder with your supervisor?

A. 3 times

B. 2 times

C. 5 times

D. Until you are both satisfied

Module Ten: Review Questions

3. What is Not a method of introduction?

A. Email

B. Test

C. Meeting

D. All of the above

Module Ten: Review Questions

4. What is true of the introducing the guide?

A. It does not need to be communicated

B. Only one method of communication should be used

C. Only one method of communication should be used at a time

D. Communication should fit the audience

Module Ten: Review Questions

5. What will determine where the guide should be placed?

A. Tasks

B. Setting

C. People

D. Nothing

Module Ten: Review Questions

6. The guide must be displayed in a location that is _____.

A. Uncluttered

B. Common

C. Accessible

D. None of the above

Module Ten: Review Questions

7. Who may update the binder?_____.

A. Employees

B. No one

C. Consultant

D. All of the above

Module Ten: Review Questions

8. What is least likely to be an opportunity for communication from employees?

A. Surveys

B. Meetings

C. One on ones

D. Website

Module Ten: Review Questions

9. Without _____, the procedure guide will not be a tool that gets much use.

A. Buy-in from stakeholders

B. A proper launch

C. Easy accessibility

D. Regular updates

Module Ten: Review Questions

10. Getting feedback from _____ will ensure that your guide is effective and applicable to the needs of your audience.

A. Executives

B. Employees

C. A and B

D. None of the above



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Success comes from taking the initiative and following up...

Anthony Robbins

MODULE ELEVEN

Successfully Executing the Guide

Your guide must evolve with the company, so remember to consider new ideas while creating a culture of consistency.

Create a One Hour Meeting/Seminar for Employees

- Establish the outcomes that you expect.
- Develop an agenda
- Train the employees



Stay Consistent with Procedures

Once procedures have been implemented, it is important that they are consistently followed.





Make Employees Aware of any Updated Changes

Policies and procedures will inevitably change over time, which is why communication is so important.

Be Open to Improvements

New ideas can be found anywhere; you may hear something in a casual conversation or read something in a book.



Practical Illustration



- Create a One Hour Meeting/Seminar for Employees
- Stay Consistent With Procedures
- Make Employees Aware of any Updated Changes
- Be Open to Improvements

Module Eleven: Review Questions

1. How long should a meeting be to explain the binder?

A. 1 hour

B. 2 hours

C. 2 days

D. 8 hours

Module Eleven: Review Questions

2. What is Not included in the agenda?

A. Topics

B. Training

C. Objective

D. Outline

Module Eleven: Review Questions

3. What is the most important factor in creating consistency?

A. Binder

B. Engagement

C. Example

D. Employee buy-in

Module Eleven: Review Questions

4. What will help ensure that the procedures are followed?

A. Binder

B. Steps

C. Supervisors

D. Checklist

Module Eleven: Review Questions

5. What is Not a formal method of communication?

A. Email

B. Meetings

C. Conference calls

D. Casual conversations

Module Eleven: Review Questions

6. What would be the best method to communicate with employees?

A. Formal communication

B. It does not matter

C. Informal communication

D. Use multiple methods

Module Eleven: Review Questions

7. What increases new ideas?

A. Dialogue

B. Interest

C. Study

D. None of the above

Module Eleven: Review Questions

8. Where are new ideas found?

A. In communication

B. In organization

C. Everywhere

D. Nowhere

Module Eleven: Review Questions

9. Your guide must evolve with the company, so remember to _____.

A. Keep it close by

B. Consider new ideas

C. Place it in a prominent place

D. All of the above

Module Eleven: Review Questions

10. Why is communication regarding policies so important?

A. Because they are written in technical terms

B. Because they will change

C. To ensure everyone has had the chance to read them

D. All of the above

Wrapping Up

Although this workshop is coming to a close, we hope that your journey to understanding Administrative Office Procedures is just beginning.



Words From the Wise

There's no shortage of remarkable ideas, what's missing is the will to execute them.

- Seth Godin

It is not the strongest of the species that survive, nor the most intelligent, but the one most responsive to change.

- Charles Darwin

Just because something doesn't do what you planned it to do doesn't mean it's useless.

- Thomas A Edison

Willingness to change is a strength, even if it means plunging part of the company into total confusion for a while.

- Jack Welch