**Administrative Office Procedures**

**Instructor Guide**

**Corporate Training Materials**

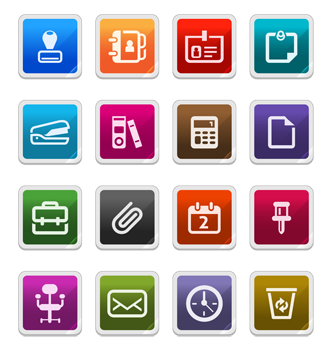


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# Preface

*To be successful, you have to have your heart in your business, and your business in your heart.*

***Thomas Watson Sr.***

## What is Courseware?

MC900071138[1]Welcome to Corporate Training Materials, a completely new training experience!

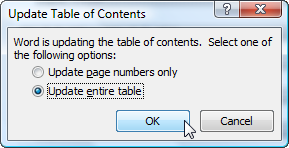
Our courseware packages offer you top-quality training materials that are customizable, user-friendly, educational, and fun. We provide your materials, materials for the student, PowerPoint slides, and a take-home reference sheet for the student. You simply need to prepare and train!

Best of all, our courseware packages are created in Microsoft Office and can be opened using any version of Word and PowerPoint. (Most other word processing and presentation programs support these formats, too.) This means that you can customize the content, add your logo, change the color scheme, and easily print and e-mail training materials.

## How Do I Customize My Course?

Customizing your course is easy. To edit text, just click and type as you would with any document. This is particularly convenient if you want to add customized statistics for your region, special examples for your participants’ industry, or additional information. You can, of course, also use all of your word processor’s other features, including text formatting and editing tools (such as cutting and pasting).

To remove modules, simply select the text and press Delete on your keyboard. Then, navigate to the Table of Contents, right-click, and click Update Field. You may see a dialog box; if so, click “Update entire table” and press OK.

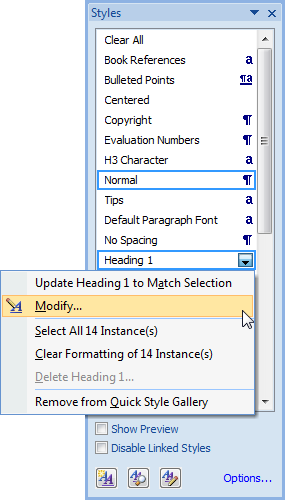


(You will also want to perform this step if you add modules or move them around.)

If you want to change the way text looks, you can format any piece of text any way you want. However, to make it easy, we have used styles so that you can update all the text at once.

If you are using Word 97 to 2003, start by clicking the Format menu followed by Styles and Formatting. In Word 2007 and 2010 under the Home tab, right-click on your chosen style and click Modify. That will then produce the Modify Style options window where you can set your preferred style options.

For example, if we wanted to change our Heading 1 style, used for Module Titles, this is what we would do:



Now, we can change our formatting and it will apply to all the headings in the document.

For more information on making Word work for you, please refer to Word 2007 or 2010 Essentials by Corporate Training Materials.

## Materials Required

All of our courses use flip chart paper and markers extensively. (If you prefer, you can use a whiteboard or chalkboard instead.)

We recommend that each participant have a copy of the Training Manual, and that you review each module before training to ensure you have any special materials required. Worksheets and handouts are included within a separate activities folder and can be reproduced and used where indicated. If you would like to save paper, these worksheets are easily transferrable to a flip chart paper format, instead of having individual worksheets.

We recommend these additional materials for all workshops:

* Laptop with projector, for PowerPoint slides
* Quick Reference Sheets for students to take home
* Timer or watch (separate from your laptop)
* Masking tape
* Blank paper

## Maximizing Your Training Power

We have just one more thing for you before you get started. Our company is built for trainers, by trainers, so we thought we would share some of our tips with you, to help you create an engaging, unforgettable experience for your participants.

* **Make it customized.** By tailoring each course to your participants, you will find that your results will increase a thousand-fold.
  + Use examples, case studies, and stories that are relevant to the group.
  + Identify whether your participants are strangers or whether they work together. Tailor your approach appropriately.
  + Different people learn in different ways, so use different types of activities to balance it all out. (For example, some people learn by reading, while others learn by talking about it, while still others need a hands-on approach. For more information, we suggest Experiential Learning by David Kolb.)
* **Make it fun and interactive**. Most people do not enjoy sitting and listening to someone else talk for hours at a time. Make use of the tips in this book and your own experience to keep your participants engaged. Mix up the activities to include individual work, small group work, large group discussions, and mini-lectures.
* **Make it relevant.** Participants are much more receptive to learning if they understand why they are learning it and how they can apply it in their daily lives. Most importantly, they want to know how it will benefit them and make their lives easier. Take every opportunity to tie what you are teaching back to real life.
* **Keep an open mind**. Many trainers find that they learn something each time they teach a workshop. If you go into a training session with that attitude, you will find that there can be an amazing two-way flow of information between the trainer and trainees. Enjoy it, learn from it, and make the most of it in your workshops.

And now, time for the training!

# Module One: Getting Started

C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\VB4U418Z\MC900367638[1].wmfAdministrative office procedures may not be glamorous, but they are essential to the success of any enterprise. A well run office reduces miscommunications and helps to eliminate common errors. By making the administrative office a priority, you will establish clear policies and procedures with employee understanding and buy-in, which ensures that your work environment runs smoothly.

*An essential aspect of creativity is not being afraid to fail.*

***Edwin Land***

## Housekeeping Items

Take a few moments to cover basic housekeeping items.

* If you need an opening or a way to introduce the participants to each other, utilize the Icebreakers folder to begin or between breaks during the day.
* Let participants know where they can find washrooms, break facilities, and fire exits.
* Ask participants to turn off their cell phones or at least turn them to vibrate. If they must take a call, request that they do it outside.
* Take this time to encourage the group to ask questions and make this an interactive workshop.
* Write the words Respect, Confidentiality, and Practice on a piece of flip chart paper and tape it to the wall. Explain to participants that in order to get the most out of this workshop, we must all work together, listen to each other, explore new ideas, and make mistakes. After all, that’s how we learn!

## The Parking Lot

MC900057299[1]Explain the concept of The Parking Lot to participants.

* The Parking Lot is a visible place where you will “park” ideas that arise which are not on the agenda, may be off topic, or are better addressed outside of the program.
* At the end of the session, we will review parked ideas and follow up, or make suggestions for your own investigation when you are back at work.

Suggestions for the trainer:

1. If you are working with a large group of participants, you may wish to nominate a recorder to park items as you are facilitating.
2. It’s a good idea to note the name of the contributor along with the parked item.
3. Items noted on the parking lot can be useful to you later as you plan future training sessions.

## Workshop Objectives

MCj02934740000[1]Research has consistently demonstrated that when clear goals are associated with learning, it occurs more easily and rapidly. With that in mind, let’s review our goals for today.

At the end of this workshop, participants should be able to:

* Organize a binder
* Develop procedures
* Prepare checklists
* Understand succession planning
* Collect the correct tools

# Module Two: Why Your Office Needs Administrative Procedures

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

***Anonymous***

Administrative procedures are more than mundane policies. They are put in place to ensure the survival of the company in any event or situation. From catastrophes, to change, to basic day-to-day activities, administrative office procedures address them all when they are done correctly. Business continuity, succession planning, audit requirements, and recovery planning are all included in administrative procedures.

## Business Continuity

Business continuity is also known as business continuance. It is the plan in place to keep a company running in the event of a disaster, both during and after the disaster. Establishing business continuity requires identifying essential tasks first. This includes items and services that are critical for the organization to function. These will vary by organization but they include technology, employee safety, sound structure, etc.

**Business Continuity Steps:**

* Determine risks that the company will likely face (weather, IT, sabotage, etc.).
* Analyze the effects of each risk or hazard that you discover on different aspects of the company (safety, functions, assets, etc.). Determine how long your company could function if one of these risks came to pass and what recovery would require.
* 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.

|  |  |
| --- | --- |
| **Estimated Time** | **7 minutes** |
| **Topic Objective** | Introduce business continuity. |
| **Topic Summary** | **Business Continuity**  Consider business continuity. |
| **Materials Required** | **01 - Business Continuity** |
| **Planning Checklist** | None |
| **Recommended Activity** | Complete the worksheet individually. Share your answers with the rest of the class. |
| **Stories to Share** | Share any personal or relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What is an essential task? |

## Succession Planning

Successful succession planning develops a pool of talent so that there are more than enough qualified candidates to fill vacancies in leadership. This strategy requires recruiting qualified talent, creating a talent pool, and instilling loyalty in employees.

* **Identify goals and objectives:** Common goals include profitability, employee loyalty, service, and productivity.
* **Identify needs in the company:** Consider changes in the responsibilities of different positions the company develops.
* **Recognize trends in the workforce:** Understand the changes occurring in within and without your organization, such as an aging workforce.
* **Develop the employee pool:** Determine where to find employees to fill in the gaps (within, recruiting drives, social media, etc.), and develop a plan to engage them once they are chosen.

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| **Estimated Time** | **10 minutes** |
| **Topic Objective** | Problem solving. |
| **Topic Summary** | **Problem Solving**  Explore creative problem solving. |
| **Materials Required** | **02 - Succession Planning** |
| **Planning Checklist** | None |
| **Recommended Activity** | Complete the worksheet individually. Share your answers with the rest of the class. |
| **Stories to Share** | Share any personal relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | Define succession planning. |

## Internal and External Audit Requirements

Both internal and external audits are important for identifying risks that organizations face. The internal audit addresses how effective and reliable administrative controls are. An internal audit also addresses record accuracy, legal compliance, and management action. Internal audits and external audits are similar, but the internal auditor is an employee of the company that he or she audits. The external auditor is not an employee, and he or she will create a report based on the finances, operations, and compliance of companies. Both internal and external auditors provide recommendations based on their assessments.

The auditor, whether internal or external, is required to be independent and objective, qualified, provide adequate testing, provide adequate documentation and action, offer verification and review, and give a report that will be reviewed by relevant parties, such as the board of directors.

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| **Estimated Time** | **7 minutes** |
| **Topic Objective** | Introduce internal and external audit requirements. |
| **Topic Summary** | **Internal and External Audit Requirements**  Consider the importance of imagination and inspiration to the creative process. |
| **Materials Required** | **Flipchart/board and marker** |
| **Planning Checklist** | None |
| **Recommended Activity** | Discuss your experiences with internal and external audits. Consider the pros and cons of each, and list these on the flipchart/board. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What do audits identify? |

## Recovery Planning

Recovery planning goes hand-in-hand with business continuity. Recovery planning or disaster recovery planning is the process that is put in place to recover data, software, hardware, and manpower that the company needs to start back up after a disaster.

**Recovery Planning Steps:**

* Identify critical systems and prioritize them, and identify potential risks.
* Determine strategies for data, technology, suppliers, people, and facilities.
* Create a plan with step-by-step instructions based on the strategies discovered.
* Test the recovery plan and make adjustments as necessary.

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| **Estimated Time** | **7 minutes** |
| **Topic Objective** | Introduce recovery plans. |
| **Topic Summary** | **Recovery Planning**  Discuss recovery plans. |
| **Materials Required** | **03 - Recovery Plan** |
| **Planning Checklist** | None |
| **Recommended Activity** | Complete the worksheet individually. Share your answers with the rest of the class. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What does a recovery plan relate to? |

## Case Study

Sharon worked at the same company for 26 years. She was coming close to retirement and asked her supervisor if her help was needed training her replacement. She was surprised to learn that no one was in the running for her position, and she retired in a month. Her supervisor explained that they were having trouble finding someone qualified to replace her.

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| **Estimated Time** | **5 minutes** |
| **Topic Objective** | Outline the Why Your Office Needs Administrative Procedures case study. |
| **Topic Summary** | **Case study**  Discuss the importance of succession planning. |
| **Materials Required** | None |
| **Planning Checklist** | None |
| **Recommended Activity** | Discuss the outcome of the case study. What should have been done differently? What do you think will happen after Sharon retires? |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | Why do you think there was there no replacement? |

## Module Two: Review Questions

1. Business continuity is also called \_\_\_\_\_\_\_.
2. Business strength
3. Business continuance
4. Business conformity
5. Business combination

Business continuity is also called business continuance. It keeps a company going in the event of a disaster.

1. What is not an example of a risk?
2. Weather
3. IT
4. Sabotage
5. Functions

Functions need to be analyzed in business continuity, but they are not risks. The other answers are.

1. What are profitability, employee loyalty, service, and productivity?
2. Goals
3. Needs
4. Trends
5. All of the above

It is important to determine goals in succession planning. Goals are profitability, employee loyalty, service, and productivity.

1. An aging workforce is an example of a \_\_\_\_\_\_\_\_.
2. Need.
3. Goal.
4. Trend.
5. None of the above

Trends are factors that influence the needs of succession planning. An aging workforce is an example of a trend.

1. Which type of auditor works for the company being audited?
2. External
3. Internal
4. Both
5. Neither

Internal auditors work for the company being audited. External auditors do not work directly for the company being audited.

1. What is Not required of an auditor?
2. Objectivity
3. Independence
4. Reports
5. Leadership skills

Auditors must be objective and qualified, provide adequate testing, provide adequate documentation and action, offer verification and review, and give a report that will be reviewed by relevant parties. Leadership skills are not required.

1. What is the first step in recovery planning?
2. Identify critical systems
3. Create instructions
4. Test the recovery plan
5. Create a plan

All of the answers are necessary in recovery planning. The first step is to identify critical systems.

1. What is the last step in recovery planning?
2. Identify critical systems
3. Create instructions
4. Test the recovery plan
5. Create a plan

All of the answers are necessary in recovery planning. The last step is to test the recovery plan.

1. How long did Sharon work for her company?
2. 26 years
3. 25 years
4. 24 years
5. Unknown

Sharon was nearing retirement. She had worked for her company for a total of 26 years.

1. When was Sharon retiring?
2. A Year
3. 2 weeks
4. A month
5. 2 months

Sharon was going to retire in a month. She was surprised that there was no candidate for her replacement.

# Module Three: Gathering the Right Tools

*Give us the tools and we will finish the job.*

***Winston Churchill***

C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\SSHSDPG0\MC900319814[1].wmfAny activity requires the use of the correct tools, and the administrative office is no exception. Administrative binders and other materials are necessary tools that ensure tasks are completed correctly. By gathering the necessary information and finding these tools, you will eliminate confusion and ensure that your procedures are done correctly.

## Binder

C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\SBWWZQPW\MC900370874[1].wmfAdministrative binders contain instructions on administrative procedures that all employees will be able to use. Begin by choosing a binder and collecting the necessary dividers and sheet protectors. Creating a binder requires you to keep track of the day-to-day operations. You must also develop a list of responsibilities for different jobs. The list should include daily, weekly, monthly, and annual tasks. The binder needs to include basic procedures. Begin with the job descriptions and interview different employees to determine their tasks. We will discuss what information is needed and how to collect it in depth in the next module.

The binder should also include basic resources such as phone lists, locations, and planning checklists. These will vary by organization, but technology guides and other information that is essential to know about the company’s systems should also be included.

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Introduce binders. |
| **Topic Summary** | **Binder**  Consider what to include in binders. |
| **Materials Required** | **04 – Binder** |
| **Planning Checklist** | None |
| **Recommended Activity** | Complete the worksheet individually. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What do binders include? |

## Section Divider

C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\VB4U418Z\MC900326288[2].wmfSection dividers are used to physically break down the binder into different sections so that information will be easier to find. After collecting all of the relevant information, organize it and create a table of contents. The table of contents will guide your section division. (We will specifically address the table of contents later.) The sections and topics will vary by organization, but they need to be organized in a clear and concise manner. Use tabbed sheet protectors as section dividers to make it easier to find specific information.

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Explore the importance of section division. |
| **Topic Summary** | **Section Divider**  Discuss section dividers. |
| **Materials Required** | **Flipchart/board and marker** |
| **Planning Checklist** | None |
| **Recommended Activity** | Discuss different ways to organize binders. Create a list of sections as a group and list these on the flipchart/board. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What do section dividers do? |

## Sheet Protectors

![](data:None;base64,)Sheet protectors are necessary to keep the binder safe from accidents and spills. Tabbed sheet protectors should be used for section dividers. Regular, un-tabbed sheet protectors need to be used for the other pages in the binder. Heavy-duty sheet protectors are recommended for pages that will be used frequently such as templates, phone lists, and checklists. It is not necessary to place each page in sheet protectors. Leaving the bulk of pages outside of sheet protectors will make it easier to make changes to the information when necessary.

|  |  |
| --- | --- |
| **Estimated Time** | **7 minutes** |
| **Topic Objective** | Introduce sheet protectors. |
| **Topic Summary** | **Sheet Protectors**  Consider ways to remove mental blocks. |
| **Materials Required** | **Flipchart/board and marker** |
| **Planning Checklist** | None |
| **Recommended Activity** | Refer to the lists made in the previous section. Discuss which topics and items should use sheet protectors. Note these on the flipchart/board. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | Why are sheet protectors necessary? |

## C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\VB4U418Z\MC900434867[1].pngCover to Cover Binders

Once you have collected all of the items needed to create a binder, determined what should be included, and organized the information, it is time to place everything in the binder. Choosing the correct binder is important. The information in the binder should be completely enclosed so that it is kept safe. The binders need to be reviewed cover-to-cover to ensure that they are completely enclosed. The size of the binder typically used for this purpose should be one ½ inch to 2 inches wide. It is important to choose a binder that is large enough to add pages to if necessary. Additionally, choosing a binder that is too small can cause the pages to tear and fall out as the binder is used.

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Consider the importance of choosing the correct binders. |
| **Topic Summary** | **Cover to Cover Binders**  Discuss binders. |
| **Materials Required** | **Samples of different binders** |
| **Planning Checklist** | **None** |
| **Recommended Activity** | Show the class samples of different binders. Discuss how many pages can be included in different size binders. Have the class share stories of troublesome binders that they have used. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | When is the information placed in the binder? |

## C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\02FT6985\MC900217714[1].wmfCase Study

Aaron was told to create a procedures binder with the tools available to him. He was able to find a 1-inch binder and un-tabbed sheet protectors. As he was putting the binder together, he realized that it was going to be a tight fit. To create section dividers, he placed post-it notes between the sections. As he looked through it, pages fell out and so did the section dividers.

|  |  |
| --- | --- |
| **Estimated Time** | **5 minutes** |
| **Topic Objective** | Outline the Gathering the Right Tools case study. |
| **Topic Summary** | **Case Study**  Discuss the importance of tools. |
| **Materials Required** | None |
| **Planning Checklist** | None |
| **Recommended Activity** | Discuss the outcome of the case study. What should Aaron have done differently? |
| **Stories to Share** | Share any personal relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What was Aaron’s task? |

## Module Three: Review Questions

1. Which of the following is Not a resource?
2. Contact list
3. Checklist
4. Job descriptions
5. Planning locations

Job descriptions can be used to help create binders. The other answers are resources that can be included in binders.

1. What is the first step in creating an administrative binder?
2. Choose a binder
3. Interview employees
4. Read job descriptions
5. None of the above

The first step in creating an administrative binder is to collect the necessary tools. The binder is the necessary tool.

1. What is useful as a section divider?
2. Folders
3. Tabbed sheet protector
4. Un-tabbed sheet protector
5. Multiple binders

Section dividers break the binder into sections. Tabbed sheet protectors are useful as section dividers.

1. How do section topics vary?
2. Department
3. By leadership
4. By demographic
5. Organization

The section topics for each organization will vary according to its structure.

1. Frequently used pages will require which of the following?
2. Tabbed sheet protectors
3. Heavy duty sheet protectors
4. Un-tabbed sheet protectors
5. None of the above

Frequently used pages will require heavy-duty page protectors. Not every page needs a page protector.

1. Why not use sheet protectors on all pages?
2. Save money
3. There is not room
4. The binder would be bulky
5. It is easier to make changes

It is not necessary to use sheet protectors on all sheets. This allows you to write down changes easily.

1. What is the average size of a binder?
2. 1 ½ inches
3. 1 inch
4. 3 inches
5. 2 ½ inches

Binders are typically 1 ½ to 2 inches. The first answer choice is correct.

1. What occurs when the binder is too small?
2. It is too difficult to organize
3. There is not enough room for the binder
4. Pages fall out
5. None of the above

When binders are too small, they cannot easily contain all of the pages. This causes the pages to fall out of the binder.

1. What size binder did Aaron have?
2. 1-inch
3. 1 ½ inch
4. 2 inches
5. 3 inches

Aaron used a 1-inch binder. This was too small to complete the task.

1. What type of sheet protector did Aaron use?
2. None
3. Tabbed and un-tabbed
4. Tabbed
5. Un-tabbed

Aaron only had un-tabbed sheet protectors. This made section dividers difficult to establish.

# Module Four: Identifying Procedures to Include

When creating an administrative office binder, it is important to choose the procedures that are necessary. If you put too much information in a binder, it becomes difficult to navigate. If, however, you do not put enough information in a binder, it is useless. 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.

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

***Tom Peters***

## Tracking Tasks for Some Days

C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\SSHSDPG0\MC900039006[1].wmfIn order to identify the procedures you need to include, it is necessary to track tasks for a few days. This should help you identify the following information:

* 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.
* Determine which events and meetings are repetitive.

Track this information using apps, organizational tools, or write notes. Choose the method that works best for you. Once the information is discovered, it will help narrow down the procedures that you need to include in the binder.

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Explore the importance of tracking tasks. |
| **Topic Summary** | **Tracking Tasks for Some Days**  Consider the information that you need to discover when tracking tasks. |
| **Materials Required** | **05 – Tasks** |
| **Planning Checklist** | None |
| **Recommended Activity** | Complete the worksheet individually, and share your answers with the rest of the class. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What is necessary to establish procedures for binders? |

## Reach Out to Other Employees for Feedback/Ideas

C:\Program Files\Microsoft Office\MEDIA\CAGCAT10\j0195812.wmfDetermining which procedures to include is not a unilateral decision. It is important to collect feedback from employees and ask them for their ideas about what procedures need to be included in the administrative binder. Take advantage of multiple methods of feedback to ensure that you gather as much information as possible.

**Feedback Methods:**

* Surveys
* Focus groups
* Meetings
* Questionnaires
* Evaluations
* Suggestion boxes

It is essential to stress that you need to prepare employees before asking them for feedback. Give them time to analyze their own tasks and provide the most relevant information.

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Introduce employee feedback. |
| **Topic Summary** | **Reach Out to Other Employees for Feedback/Ideas**  Discuss employee feedback. |
| **Materials Required** | **Flipchart/board and marker** |
| **Planning Checklist** | None |
| **Recommended Activity** | As a group, discuss your experiences using different feedback methods. List the pros and cons of each on the flipchart/board. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | Why use multiple methods of feedback gathering? |

## Write Down Daily Tasks

We have already established that it is important to note daily, weekly, monthly, and annual 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. The time that it takes for you to complete each task needs to be recorded as well as the task itself. You may write down your tasks at the end of each day or take timed breaks to list your tasks periodically throughout the day. You may also use apps to keep track of your activities. No matter which method you choose, it is important that you complete the record of your daily tasks before you leave the office.

|  |  |
| --- | --- |
| **Estimated Time** | **7 minutes** |
| **Topic Objective** | Introduce daily tasks. |
| **Topic Summary** | **Write Down Daily Tasks**  Discuss daily tasks. |
| **Materials Required** | **Flipchart/board and marker** |
| **Planning Checklist** | None |
| **Recommended Activity** | Discuss different methods for writing down your daily tasks. Ask students to share any experiences they have with different methods, and list the pros and cons of each on the flipchart/board. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What type of task should be recorded? |

## Keep Track Using a Spreadsheet

As you track different tasks to determine which procedures to include in the binder, it is important to keep track of which tasks are daily, weekly, monthly, annually, etc. The best way to do this is with a spreadsheet.

**Example:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Tasks** | **Daily** | **Weekly** | **Monthly** | **Quarterly** | **Annually** |
| Payroll |  |  | X |  |  |
| Return email | X |  |  |  |  |

You may need to add times for your tasks. For example, payroll may be bimonthly and meetings can be biweekly.

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Introduce spreadsheets. |
| **Topic Summary** | **Keep Track Using a Spreadsheet**  Discuss two person teams. |
| **Materials Required** | **06 – Spreadsheet** |
| **Planning Checklist** | None |
| **Recommended Activity** | Complete the worksheet individually, and share your answers with the rest of the class. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What needs to be recorded when keeping track of tasks? |

## Case Study

C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\SSHSDPG0\MC900410407[1].wmfJoan was trying to keep track of her activities, but she was extremely busy. She planned on recording the task as soon as she left the office, but by the time that she returned home, she was not able to recall everything that she did that day. To top it off, she did not have any idea how long any of the tasks took her to complete. She decided to list what she remembered and estimated how long she thought it would take to complete each one. She did this for a few days and used the information to identify her procedures.

|  |  |
| --- | --- |
| **Estimated Time** | **5 minutes** |
| **Topic Objective** | Introduce the Identify Procedures to Include case study. |
| **Topic Summary** | **Case Study**  Discuss the importance of preparation and teams. |
| **Materials Required** | None |
| **Planning Checklist** | None |
| **Recommended Activity** | Discuss the result of the case study. How accurate do you think the information was? |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What was Joan trying to do? |

## Module Four: Review Questions

1. What is not a way to track tasks?
2. Apps
3. Job description
4. Writing
5. Checklists

The job description does not track tasks. The other answers are methods used to track tasks.

1. How long should tasks be tracked?
2. None
3. Weeks
4. Months
5. Days

It is important to track tasks to determine which procedures to include. The tasks should be tracked for a few days.

1. What is Not a method of feedback?
2. Tracking tasks
3. Survey
4. Meetings
5. Evaluations

Tracking tasks is not a method of feedback. The other answers are useful methods of collecting feedback.

1. What needs to occur before feedback is collected?
2. Increase interest
3. Nothing
4. Prepare employees
5. All of the above

It is necessary to prepare employees so that they can consider the feedback that they want to share.

1. What needs to be written down with the tasks?
2. Times
3. Skill level
4. Interest
5. Priority

It is necessary to record the time that it takes to complete a task as well as the task itself.

1. When should tasks be recorded?
2. As they happen
3. By the end of the day
4. Each morning
5. It does not matter

Tasks need to be recorded by the end of the day and you leave the office. They may also be recorded as the tasks are completed.

1. Which tool is useful for keeping track of tasks?
2. Word
3. PowerPoint
4. Spreadsheet
5. All of the above

It is necessary to track how often tasks are done. A spreadsheet is a useful tool to do this.

1. Which task is most likely to be biweekly?
2. Emails
3. Phones
4. Payroll
5. Meetings

Meetings may be biweekly. Emails and phones are typically used daily, and payroll is usually done monthly, weekly, or bimonthly.

1. Where did Joan record her tasks?
2. At home
3. At the office
4. Where they occurred
5. All of the above

Joan was attempting to track her tasks. She recorded them after work when she returned home.

1. What did Joan estimate?
2. Tasks
3. Cost
4. Nothing
5. Time

Joan did not remember how long it took to complete each task. She estimated the time that the tasks she could remember took.

# Module Five: Top Five Procedures to Record

*Data beats emotion.*

***Sean Rad***

When creating a binder, it is not possible to address all procedures at the same time. For the best results, it is necessary to limit yourself to five procedures. Begin by choosing the top five procedures that you need to record. Once you identify the top five procedures, 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. There are different templates available, but you can also create your own template and tailor it to the needs of your organization.

**What to Include in a template:**

* Department: The department that the procedure falls under
* Category: The division that the procedure falls under (Accounting, HR, etc.)
* Job: The job title of the individual who typically performs the procedure
* Purpose: The reason for the procedure’s implementation
* Statement: The policy statement outlines the actions and behavior required using the active voice.
* Regulations: List any laws or regulations to which the policy applies
* Related information: List any guidelines, policies, or procedures related to the new policy.

You may also need to include keywords, definitions, or background information, depending on the scope and complexity of your procedures.

|  |  |
| --- | --- |
| **Estimated Time** | **10 minutes** |
| **Topic Objective** | Introduce templates. |
| **Topic Summary** | **Use a Template to Stay Consistent from Track to Track**  Consider templates based on the needs of your organization. |
| **Materials Required** | **07 – Template** |
| **Planning Checklist** | None |
| **Recommended Activity** | Complete the worksheet individually. Share your answers with the rest of the class. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. You may want to bring in an example of a template to share with the class. |
| **Review Questions** | What does a template help provide? |

## Be as Detailed as Possible

C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\SBWWZQPW\MC900357085[1].wmfWhen recording a procedure, you need to be as specific as possible. Provide every detail that you can. Remember that the procedure needs to be recorded so that anyone can complete it without supervision. Write down the steps to your process and review them carefully to determine if you need to clarify steps or add to them.

Do not skip steps to save time or space. On the other hand, avoid using long, wordy instructions that will overwhelm and confuse your readers. The instructions need to be short commands such as “log into the portal at the following website.” An example of an instruction that is too long and wordy would be: “Go to the website and use your password to log into the portal so that you can enter the information you collected."

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Introduce detailed instructions. |
| **Topic Summary** | **Be as Detailed as Possible**  Explore detailed instructions. |
| **Materials Required** | **08 - Detailed Steps** |
| **Planning Checklist** | None |
| **Recommended Activity** | Complete the worksheet individually. Share your answers with the rest of the class. Have the students provide feedback to each other. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What is necessary when recording a procedure? |

## Use Bullet Points Instead of Paragraphs

![](data:None;base64,)The steps that you provide for procedures need to be clear and easy for people to follow. This is where formatting becomes important. Rather than writing the instructions in paragraph format, use bullet points instead.

* Bullet points attract the attention of your readers.
* They are easy to use and provide basic, concise information.
* Bullet points also make it easier for people to keep their place as they are following the steps that you provide.
* Each step should have its own bullet point.

|  |  |
| --- | --- |
| **Estimated Time** | **6 minutes** |
| **Topic Objective** | Introduce bullet points. |
| **Topic Summary** | **Use Bullet Points Instead of Paragraphs**  Discuss the use of bullet points and paragraphs. |
| **Materials Required** | **Flipchart/board and marker** |
| **Planning Checklist** | None |
| **Recommended Activity** | As a group, discuss using instructions in paragraph and bullet point format. Whist makes useful bullet points? List what the class feels make bullet points useful on the flipchart/board. |
| **Stories to Share** | Share any personal, relevant stories |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What is true when documenting procedures? |

## Ask Someone to Execute the Procedure

C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\SSHSDPG0\MC900311778[1].wmfBefore you complete your work recording a procedure, you need to make sure that the procedure is effective. This requires the procedure to be tested. Find a friend or colleague to complete the procedure as you have written it down. It is essential that the person who completes the procedure does so without any direction or interference from you. The written procedure must be able to stand on its own. Once the procedure is executed, ask the individual for feedback.

**Questions to ask:**

* Were all of the instructions clear?
* Did you feel that any steps were missing?
* Were any of the directions confusing?
* Were you able to complete the procedure?
* What would you change, if anything, about the procedure?

|  |  |
| --- | --- |
| **Estimated Time** | **7 minutes** |
| **Topic Objective** | Introduce executing the procedure. |
| **Topic Summary** | **Ask Someone to Execute the Procedure**  Discuss testing procedures |
| **Materials Required** | **08 - Detailed Steps (completed earlier)** |
| **Planning Checklist** | None |
| **Recommended Activity** | Divide the class into pairs and ask them to review each other’s detailed steps. Discuss the importance of feedback and testing as a group. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What must be done before completing a procedure? |

## Case Study

C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\02FT6985\MC900383516[1].wmfMatilda recorded the top 5 procedures and listed the steps out carefully. She reviewed the steps and decided they were effective. She even tested them by following the instructions herself as she completed the tasks. She recorded them, and placed them in the binder. She was surprised the next week when her supervisor told her that she needed to rework some of her procedures because the steps were not clear.

|  |  |
| --- | --- |
| **Estimated Time** | **5 minutes** |
| **Topic Objective** | Introduce the Top Five Procedures to Record case study. |
| **Topic Summary** | **Case Study**  Discuss the results of the case study. |
| **Materials Required** | None |
| **Planning Checklist** | None |
| **Recommended Activity** | Discuss the case study. What were her mistakes, and what could she have done differently? |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | Why did Matilda record? |

## Module Five: Review Questions

1. What is Not included in the template?
2. Goals
3. Job
4. Purpose
5. Regulations

Goals do not need to be included in the template. The other answers are necessary for the template.

1. Accounting would fall under which of the following in a template?
2. Job
3. Category
4. Purpose
5. Regulation

The category is the division that the task falls under. Accounting is a category.

1. Instructions should be \_\_\_\_\_\_.
2. Long explanations
3. Exploratory
4. Short commands
5. Requests

Instructions should be short commands that are concise and easy to understand.

1. What should be done after recording steps?
2. Move to the next step
3. Nothing
4. Practice them
5. Review them

Steps need to be reviewed after they are recorded. Pay attention any gaps that you may need to fill.

1. What makes procedures easier to follow?
2. Bullets
3. Paragraphs
4. Tabs
5. All of the above

Formatting makes procedures easier to understand. Bullets make procedures easy to follow.

1. What should have its own bullet point?
2. It does not matter
3. Each procedure
4. Each title
5. Each step

When using bullet points with instructions, each step should have its own bullet point.

1. What is important when testing procedures?
2. The instructions are written
3. It is unaided
4. They are observed
5. None of the above

Live tweeting is necessary for webinars. A moderator needs to monitor live tweeting in order to address issues as they occur.

1. What is necessary after the instructions are tested?
2. Changes
3. Conversations
4. Feedback
5. Dialogue

Testing is necessary to determine if the instructions make sense. This requires feedback after the test is complete.

1. How long after placing her procedures in the binder, was she approached by her supervisor?
2. Month
3. Week
4. Day
5. Weeks

Matilda was approached by her supervisor a week after placing her procedures in the binder.

1. How did she test the steps?
2. Friend
3. Peer
4. She did not
5. Herself

Matilda tested her instructions. She did this herself by following them while performing daily tasks.

# Module Six: What to Include in Your Binder (I)

C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\SSHSDPG0\MC900349589[1].wmfWhen creating an administrative binder, you must determine what should be included and what should not. The needs of each organization will determine which topics you should include in the binder. There are, however, certain topics that should be included in the binders of most organizations. Commonly used topics include phone etiquette, business writing, arranging meetings, and time management.

## Phone Etiquette

*Diligence is the mother of good luck.*

***Benjamin Franklin***

Each organization needs to have its own set of guidelines for phone use. The tone of the company will determine the tone used on the phone. There are, however, some basic rules of phone etiquette that most companies can benefit from implementing.

**Basic Etiquette:**

* Answer by the third ring.
* Have a standard greeting.
* Use hold appropriately.
* Transfer calls efficiently.
* Take messages when necessary.
* Maintain the appropriate tone.

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Introduce phone etiquette. |
| **Topic Summary** | **Phone Etiquette**  Practice reminder emails. |
| **Materials Required** | **09 - Phone Etiquette** |
| **Planning Checklist** | None |
| **Recommended Activity** | Complete the worksheet individually and share your answers with the rest of the class. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What does each organization need? |

## Business Writing

C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\SSHSDPG0\MC900252593[1].wmfBusiness writing is an essential skill that each person in your organization needs to grasp. Poor writing reflects badly on the company, implementing a few procedures will reduce mistakes and improve writing skills. Your procedures should be based on the type of writing that your employees must complete. Some basic techniques should be included in the different procedures:

* Use the active voice instead of the passive.
  + We will attend a meeting at 9:00 am on Wednesday. NOT A meeting will be attended by us at 9:00 am on Wednesday.
* Avoid the overuse of buzzwords and jargon.
* Do not use exclamation points; only use them when appropriate.
* Use short sentences and simple vocabulary.
* Read writing aloud.
* Proofread all written communication.

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Consider the importance of business writing. |
| **Topic Summary** | **Business Writing**  Discuss business writing. |
| **Materials Required** | **Flipchart/board and marker** |
| **Planning Checklist** | None. |
| **Recommended Activity** | As a group, discuss writing techniques that people find irritating and what should be included in the business writing procedures. List these on the flipchart/board. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What is the result of poor writing? |

## Effective Time Management

C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\SSHSDPG0\MC910217099[1].wmfEvery organization can benefit from effective time management. When documenting procedures, it is important to include time management strategies.

**Strategies:**

* Stay organized: Organize the workspace so that you do not waste time looking for things.
* Prioritize tasks: Complete important tasks before the unimportant ones.
* Stop procrastinating: Identify procrastination and avoid it.
* Make a schedule
* Delegate: Give others the responsibilities that do not require your attention.

Binders should include tools with the strategies to help manage time. Tools that binders may include are schedules, time sheets, checklists, and estimated timing per task to help employees keep track of their work and make adjustments as necessary.

|  |  |
| --- | --- |
| **Estimated Time** | **7 minutes** |
| **Topic Objective** | Introduce the importance of effective time management |
| **Topic Summary** | **Effective Time Management**  Discuss the concept of time management and how it relates to the binder. |
| **Materials Required** | **Flipchart/board and marker** |
| **Planning Checklist** | None |
| **Recommended Activity** | Discuss different time management strategies as a group and list them on the flipchart/board. List tools that would help facilitate these strategies. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | Why stay organized? |

## Creating Meeting Arrangements

All companies require meetings from time to time. When arranging for meetings, it is easy to overlook something. Providing a checklist to help create meeting arrangements will help ensure that nothing is overlooked, and the meetings go smoothly. The types of meetings you are arranging will determine the checklist. For example, a meeting with members from out of town will require more preparation that a weekly employee meeting.

**Tasks to Include in checklists:**

* Group size
* Venue
* Notices and follow-ups
* Confirm speakers (when necessary)
* Financial arrangements
* Room arrangements
* Meal planned (if necessary)
* Sleeping arrangements (if necessary)

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Consider arrangements for meetings. |
| **Topic Summary** | **Creating Meeting Arrangements**  Practice crafting checklists for meetings. |
| **Materials Required** | **10 – Checklist** |
| **Planning Checklist** | None |
| **Recommended Activity** | Complete the worksheet individually, and share the answers with the rest of the class. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What occurs easily when making arrangements for meetings? |

## Case Study

![](data:None;base64,)George was responsible for planning the annual company meeting. He kept track of all his communication, suggestions, and requests of other employees. The first day of the meeting, he discovered that three people were not coming. Two of them were supposed to be honored at a presentation. He had forgotten to follow up with all of the speakers and attendees. George hoped that this was the only thing that he overlooked.

|  |  |
| --- | --- |
| **Estimated Time** | **5 minutes** |
| **Topic Objective** | Introduce the What to Include in Your Binder I case study. |
| **Topic Summary** | **Case Study**  Consider the importance of plans and arrangements. |
| **Materials Required** | None |
| **Planning Checklist** | None |
| **Recommended Activity** | Discuss the results of the case study. What did George forget? How could this have been avoided? |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What was George’s responsibility? |

## Module Six: Review Questions

1. What determines the tone used on the phone?
2. Company
3. Individual
4. Topic
5. All of the above

The tone of the company will guide communication. It will determine the tone used on the phone.

1. What is Not included in basic phone etiquette?
2. Standard greeting
3. Hold music
4. Tone
5. Answer on the third ring

Hold music is not necessarily basic phone etiquette. The other answers are basic etiquette.

1. What should be used in business writing?
2. Passive voice
3. Subjunctive
4. Active voice
5. All of the above

Business writing should be done in the active voice. Passive voice needs to be avoided in business writing.

1. What type of language should be avoided?
2. Short sentences
3. Voice
4. Commands
5. Jargon

The use of jargon and buzzwords need to be avoided in business writing. Short sentences and active voice should be used.

1. What is Not a strategy of effective time management?
2. Make a schedule
3. Reviews
4. Prioritize tasks
5. Delegate

Reviews are not time management strategies. The other answers are.

1. Which task should be completed first?
2. Unimportant
3. Boring
4. Important
5. Difficult

Time management requires prioritizing tasks. Important tasks should be done first.

1. Which of the following is Not a task that you would include in a checklist?
2. Past meetings
3. Venue
4. Sleeping arrangement
5. Group size

Past meetings are not necessary to include in a checklist. The other answers may be included in the checklist.

1. Which meeting is easier to plan?
2. Out of town meetings
3. Annual meetings
4. Company meetings
5. Weekly meetings

The type of meeting being planned determines the preparation needed. Weekly meetings are typically onsite and easier to plan.

1. How many people did not come the first day?
2. 1
3. 2
4. 3
5. 0

Three people did not come the first day of the meeting. Two were being honored.

1. What did George forget?
2. Nothing
3. Video
4. Follow up
5. Unanswered questions

George forgot to follow up with people, which is why he did not realize some people were not coming.

# Module Seven: What to Include in Your C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\SBWWZQPW\MC900441400[1].pngBinder (II)

Binders need to include basic policies that employees can easily consult if they have any questions. Policies that most companies should include in binders cover absences, breaks, benefits, and salaries. Make sure that the policies are clearly written, cover general information, and comply with state and federal regulations.

## Policy on Absences

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

***Henry Ford***

Employee absences are costly. In order to prevent unwanted or unscheduled absences, there should be a clear policy. The policy needs to comply with government regulations on every level.

**What to include in an absence policy:**

* Define different types of absences: PTO, sick days, jury duty, authorized, and unauthorized absences
* Notification requirements and procedures
* Requirements for punctuality: e.g. The number of missed hours that equal an absence
* Emergency absences
* Consequences of unauthorized absences and job abandonment

|  |  |
| --- | --- |
| **Estimated Time** | **9 minutes** |
| **Topic Objective** | Introduce absence policies |
| **Topic Summary** | **Policy on Absences**  Consider what needs to be included in the absence policy |
| **Materials Required** | **11 - Absences** |
| **Planning Checklist** | You may want to bring a copy of federal, state, and local laws related to absences. |
| **Recommended Activity** | Complete the worksheet individually. Check your answers with the rest of the class. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What must absence policies comply with? |

## Breaks

C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\VB4U418Z\MC900039007[1].wmfBreaks need to be clearly outlined in the company policies and prominently placed in the binder. Without clear policies, employees might abuse their breaks. On the other hand, you may be violating the law if employees do not take the minimum breaks that are required. Break policy should include lunches and short breaks along with specific times when they should be taken, if applicable.

Be sure to create break policies that comply with the legal requirements. If you have branches in more than one location, it is advisable to make sure that your breaks comply with the strictest requirements. For example, if employees would require 30-minute breaks in one state and 15 minutes in another, give all employees 30 minutes. This provides uniformity in your policies.

|  |  |
| --- | --- |
| **Estimated Time** | **7 minutes** |
| **Topic Objective** | Consider break policies. |
| **Topic Summary** | **Breaks**  Discuss break policies. |
| **Materials Required** | **Flipchart/board and marker** |
| **Planning Checklist** | None |
| **Recommended Activity** | Discuss different break policies. How would these vary by position? List different break policies on the flipchart/board. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | Why make all breaks the same? |

## Salaries

The policy concerning pay and salary must be outlined clearly in the binder. While it will not disclose the salaries of specific positions, the policy should include some basic information.

* 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

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Introduce policies for salaries. |
| **Topic Summary** | **Salaries**  Consider policies regarding salaries. |
| **Materials Required** | **12 - Salaries** |
| **Planning Checklist** | None |
| **Recommended Activity** | Complete the worksheet individually, and share your answers with the rest of the class. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What is not disclosed in the salary policies? |

## Benefits

Employee benefits can be confusing. Explaining the policies that govern employee benefits in the binder will allow employees to answer their own questions and prevent misunderstandings. It should be noted that employee benefits might overlap with employee absences. You must clearly state what makes employees eligible for specific benefits.

**Benefits to Address:**

* Group insurance
* Cobra benefits
* Retirement (e.g. 401Ks)
* Holidays
* Leave
* Educational assistance
* Development and Training

|  |  |
| --- | --- |
| **Estimated Time** | **7 minutes** |
| **Topic Objective** | Introduce benefits. |
| **Topic Summary** | **Benefits**  Discuss different benefits and how to address them. |
| **Materials Required** | **Flipchart/board and marker** |
| **Planning Checklist** | None |
| **Recommended Activity** | Ask the class if they have any benefits to add and place the complete list on the flipchart/board. Discuss the different qualifications that each one may require, and come up with a few bullet points for each. Place these on the flipchart/board. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | Why include benefits in the employee binder? |

## Case Study

C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\SSHSDPG0\MC900440524[1].wmfHank disliked taking breaks. He would only stop long enough to eat his lunch and then begin working again. His supervisor encouraged other employees to emulate Hank’s commitment to the job. One of them reported the manager’s actions to HR, and Hank was soon notified that he had to take his complete lunch break each day, and his supervisor was written up for discouraging employees from taking their full breaks.

|  |  |
| --- | --- |
| **Estimated Time** | **5 minutes** |
| **Topic Objective** | Introduce the What to Include in Your Binder case study. |
| **Topic Summary** | **Case Study**  Discuss the importance of breaks. |
| **Materials Required** | None |
| **Planning Checklist** | None |
| **Recommended Activity** | Discuss the break policy. Why do you think Hank was told to take all of his breaks? |
| **Stories to Share** | Share any personal, relevant studies. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What did Hank dislike? |

## Module Seven: Review Questions

1. What is costly?
2. Employee absence
3. Policies
4. Procedures
5. Everything

Employee absences are costly to companies. Policies should be established to prevent absences.

1. What should be addressed with absences?
2. Job description
3. Nothing
4. Timing
5. Punctuality

Punctuality needs to be addressed with absences. There is a point at which tardiness becomes an absence.

1. Break policies prevent \_\_\_\_\_.
2. Illegal actions
3. Abuse by employees
4. Short breaks
5. None of the above

Break policies prevent employees from abusing their breaks.

1. What should breaks comply with?
2. Company policy
3. Employee
4. Legal requirements
5. Nothing

Break policies are necessary, and they need to comply with legal requirements

1. Where would you find cost of living increases in the binder?
2. Breaks
3. Benefits
4. Salary
5. All of the above

Salaries should cover basic information. This includes whether cost of living increases are provided.

1. What would not be included in the salary explanation in the binder?
2. Overtime
3. Timecards
4. Wage increases
5. Insurance

Insurance would fall under employee benefits. The other answers are included in salaries.

1. What may benefits overlap with?
2. Absences
3. Salary
4. Both of the above
5. None of the above

Benefits include paid time off. This may overlap with policies on absences.

1. What information on benefits must be disclosed?
2. Length of coverage
3. Eligibility
4. History of benefits
5. None of the above

The eligibility for benefits needs to be disclosed. The other answers do not.

1. What did the manager encourage employees to do?
2. Copy Hank on breaks
3. Take complete break
4. Give up breaks
5. Take long breaks

The supervisor encouraged other employees to copy Hank and not take their complete breaks.

1. Hank was told by \_\_\_\_ to take complete breaks.
2. Peers
3. Family
4. Supervisor
5. HR

Hank was told by HR to take complete breaks after employees reported their supervisor to HR.

# Module Eight: Organizing Your Binder

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

***Marcus Aurelius***

Once the policies and procedures are completed, it is time to place them in the binder. Organization of a binder is similar to any other document. You must provide a table of contents that lists each section and a list of procedures that each section covers. Once the binder is put together, you need to keep it up to date and make changes as necessary.

## Create a Table of Contents

C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\SSHSDPG0\MC900312466[1].wmfThis means the first step that you must take is to gather procedures you developed and organize them into broad sections of information, which we will discuss later. The sections that you have will be listed in the table of contents. Each of the sections will correspond with the tabbed dividers that you use in the physical organization of the binder. A popular option is to use numbered tabs that correspond with the numbers used in the table of contents, similar to the page numbers used in books. Using numbered tabs rather than named tabs make it easier to reorganize the binder when necessary.

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Introduce the table of contents. |
| **Topic Summary** | **Create a Table of Contents**  Discuss table of contents. |
| **Materials Required** | **Flipchart/board and marker** |
| **Planning Checklist** | None |
| **Recommended Activity** | As a group, discuss the pros and cons of numbered and named tabs. List these on the flipchart/board. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What is the first step? |

## List Each Section (e.g. Accounting)

Before organizing the binder, it is essential that you list out all of the sections. The focus of the company will determine what sections you need in your binder, but there are a few common sections that many companies share.

**Commonly Used Sections:**

* Accounting
* HR
* Contacts
* Daily, weekly, and monthly checklists
* Events
* IT
* Calendar

The examples used are not comprehensive, but they provide a useful starting point to help guide you in creating your own binder sections.

|  |  |
| --- | --- |
| **Estimated Time** | **7 minutes** |
| **Topic Objective** | Introduce sections. |
| **Topic Summary** | **List Each Section**  Discuss different sections in binders. |
| **Materials Required** | **Flipchart/board and marker** |
| **Planning Checklist** | None |
| **Recommended Activity** | As a group, brainstorm other sections that could be included in the binder. List these on the flipchart/board. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What will determine the binder’s sections? |

## List Procedures in that Section

As we already stated, every procedure will fall under a specific section. After you have developed the list of sections, you need to organize the procedures below them. Review the list of procedures to make sure that they are with the correct sections. The tabbed sheet protectors that divide the sections should have the section as the heading, and the procedures should be bulleted below the section. Make sure that the bullets are in the order of their appearance. This makes specific procedures easier to find.

Example:

**Accounting**

* Expense reports
* Profit and loss
* Payment processing

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Consider procedures in sections. |
| **Topic Summary** | **List Procedures in that Section**  Practice listing procedures. |
| **Materials Required** | **13 - Procedures List** |
| **Planning Checklist** | None |
| **Recommended Activity** | Complete the worksheet individually. Share your answers with the rest of the class. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | Where are procedures listed? |

## Keep Binder Updated with any New Changes

Policies and procedures will inevitably change over time. It is important that you update the binder as needed. There are several steps that you can take to keep the binder up to date:

* Mark the printed pages when you notice that the information is inaccurate.
* Leave the binder document in a folder that has a shortcut access on the computer.
* Make the changes to the file and print it immediately.
* Make the files easy to share with others responsible for it so that the information in the binder remains current.

By reviewing the binder on a regular basis, you will be able to ensure that the information being share is accurate and up-to-date.

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Introduce updates. |
| **Topic Summary** | **Keep Binder Updated with any New Changes**  Discuss updates and changes |
| **Materials Required** | **Flipchart/board and marker** |
| **Planning Checklist** | None |
| **Recommended Activity** | As a group, share any experiences with outdated information. Can anyone think of other methods that will help keep binder updated? List these on the flipchart/board. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What is inevitable in policies and procedures? |

## Case Study

Tim created and organized the binder for his team, and he encouraged everyone to use it. Soon, it became the main source of information. After a few months, the policies on benefits changed. Tim made a mental note to make the changes in the binder, but he became busy with another project and forgot about it. A month later, a colleague used the binder to help schedule his vacation, and he was surprised when he learned that his request was denied because there was a holiday blackout.

|  |  |
| --- | --- |
| **Estimated Time** | **5 minutes** |
| **Topic Objective** | Introduce the Organizing Your Binder case study. |
| **Topic Summary** | **Case Study**  Discuss the importance of updating information. |
| **Materials Required** | None |
| **Planning Checklist** | None |
| **Recommended Activity** | Discuss the results of the case study. What was Tim’s mistake? |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What was the main source of information? |

## Module Eight: Review Questions

1. The table of contents is based on which of the following?
2. Procedures
3. Steps
4. Organization
5. Sections

The table of contents is based on the broad sections that the binder is divided into. The procedures are included in the sections.

1. What is useful when corresponding tabs with the table of contents?
2. Titles
3. Numbers
4. Names
5. None of the above

Numbered tabs are useful when corresponding with the table of contents. This makes it easier to change the binder when necessary.

1. What needs to be listed before the binder can be organized?
2. Updates
3. Procedures
4. Sections
5. None of the above

The section needs to be listed before the binder can be organized.

1. What is Not included in typical sections?
2. Profit and loss
3. Accounting
4. HR
5. IT

Profit and loss is a procedure. The other answers are sections.

1. What is done after listing procedures?
2. Review
3. Complete table of contents
4. Add tab
5. None of the above

Procedures need to be reviewed after they are listed. It is necessary to make sure that they match the section they are under.

1. In what order should procedures be listed?
2. Alphabetical
3. Importance
4. Appearance
5. It does not matter

Procedures should be listed in the order in which they appear in the binder. This makes them easier to find.

1. Where would you note changes for the binder?
2. On a separate folder
3. On the pages
4. In a survey
5. You do not note changes

The necessary changes should be noted on the pages of the binder itself.

1. When should changes be made?
2. After meetings
3. At the end of the day
4. After a consultation
5. Immediately

Changes to the binder should be made immediately once they are identified.

1. What information changed?
2. Salary
3. Accounting
4. Benefits
5. None of the above

The benefits information changed a few months after the binder was created.

1. Why was the information not changed in the binder?
2. Tim did not know
3. Tim forgot
4. Tim was not permitted to change it.
5. It was changed.

Tim made a mental note to change the information, but he forgot to do it.

# Module Nine: What Not to Include in the Procedure Guide

![](data:None;base64,)We have already established what to include in the procedure guide. Now it is time to address what should never be included in a binder under any circumstances. Much of what needs to be avoided in the procedure guide is common sense. Passwords and any other confidential information must not be included on the binder. Find other methods of sharing confidential information when it is necessary.

## Passwords

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

***Sun Tzu***

Passwords should never be placed in the binders where they can be easily read. This includes all passwords that may be used regularly such as email, company portals, passwords to financial accounts, etc. If passwords need to be recorded, they should be stored in a separate folder. Physical folders with passwords should be kept in a separate location from the binder, and any computer files need to be password protected themselves.

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. This list typically includes administrators and people in executive positions.

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Introduce passwords. |
| **Topic Summary** | **Passwords**  Consider passwords. |
| **Materials Required** | **Flipchart/board and marker** |
| **Planning Checklist** | None |
| **Recommended Activity** | As a group, discuss the number of passwords that you use for work regularly. What tricks do people use to help remember their passwords? List these on the flipchart/board. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | Where should passwords never be saved? |

## Identify Other Confidential Information Via Your Employer

C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\02FT6985\MC900056450[1].wmfCompanies are responsible for a great deal of confidential information, and they have an obligation to keep this information safe. This includes social security numbers, dates of birth, company credit card information, trade secrets etc. Like passwords, all confidential information needs to be kept out of the all binders and manuals. Remember, if you have any concern that information you have may be private, do not record it for all to see. It is better to be safe than sorry.

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Introduce confidential information. |
| **Topic Summary** | **Identify Other Confidential Information Via Your Employer**  Discuss confidential information. |
| **Materials Required** | **Flipchart/board and marker** |
| **Planning Checklist** | None |
| **Recommended Activity** | As a group, brainstorm examples of information that would be confidential. List these on the flipchart/board. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What obligation do companies have? |

## 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. Obviously, writing confidential information on the folder is not an option. It is best to give it a simple label such as Administrative Information, or simply give it the same name as the executive’s title. Choosing an innocuous title will help disguise what you are storing and prevent people from becoming too interested in the folder when you need take it out.

|  |  |
| --- | --- |
| **Estimated Time** | **7 minutes** |
| **Topic Objective** | Consider how to store confidential information. |
| **Topic Summary** | **Store Information in a Folder Outside of the Guide**  Discuss storing important information. |
| **Materials Required** | **Flipchart/board and marker** |
| **Planning Checklist** | None |
| **Recommended Activity** | As a group, share different ideas for naming folders that you need to keep private. List these on the flipchart/board. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | Where should confidential information be stored? |

## Find a Secure Location to Store

Once confidential information is placed in a separate folder, it needs to be stored securely. Lock it in a drawer or file cabinet that other people are not able to easily access. Place the folder in the back of the drawer or cabinet. Only tell authorized personnel where the folder is located, and do not leave the key out where it can be found.

Any computer files that contain confidential information need to be password protected and encrypted. You should avoid storing the files on shared systems. The more difficult that it is to access information the better. Additionally, make sure malware detectors, firewalls, and other security features are updated regularly.

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Introduce secure locations. |
| **Topic Summary** | **Find a Secure Location to Store**  Discuss secure locations. |
| **Materials Required** | **Flipchart/board and marker** |
| **Planning Checklist** | None |
| **Recommended Activity** | Have the class discuss different ways to securely store information. List the ideas on the flipchart/board. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | How should confidential information be stored? |

## Case Study

C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\VB4U418Z\MC900383986[1].wmfDiana was asked to keep confidential information for her supervisor. She decided to keep the folder in her file cabinet. Her supervisor labeled the folder account numbers, so anyone who looked at the folder would know that it contained confidential information. Diana kept the cabinet locked, but she did not want to keep the key on her incase her supervisor wanted to get the file while she was gone. She left the key below the pens in her desk drawer. Eight months later, the supervisor noticed money missing from the account.

|  |  |
| --- | --- |
| **Estimated Time** | **5 minutes** |
| **Topic Objective** | Introduce the What Not to Include in the Procedure Guide case study. |
| **Topic Summary** | **Case Study**  Consider the importance of security. |
| **Materials Required** | None |
| **Planning Checklist** | None |
| **Recommended Activity** | Discuss the results of the case study. What do you think caused the money to go missing? |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What was the folder labeled? |

## Module Nine: Review Questions

1. Where should passwords be stored?
2. Separate folder
3. Binder
4. In the desk
5. On the desk

Passwords should be stored in separate folders. They should not be placed in the binder.

1. What is necessary if passwords are saved on the computer?
2. Hide the computer
3. Change the network
4. Use a password
5. All of the above

Passwords should be used to protect passwords when they are saved on the computer.

1. What is Not an example of confidential information?
2. Date of birth
3. Social security
4. Credit card information
5. Accounting procedures

Accounting procedures are not confidential. The other answer choices are examples of confidential information that should not be kept in the binder?

1. What should be done when you are not sure if information is confidential?
2. Ask
3. Do not use it in the binder
4. Secure the binder
5. All of the above

Confidential information must not be shared. If you are not sure that information is not confidential, you should not include it in the binder.

1. What is a good label for a folder of confidential information?
2. Administrative Information
3. Do Not Open
4. Confidential Information
5. No label

The label on folders that contain confidential information should be slightly misleading. The first answer choice is the best.

1. Why choose an innocuous name for a folder?
2. Increase interest
3. Make it clear
4. Reduce interest
5. All of the above

The labels of folders affect interest. You can reduce interest in a folder by giving it a boring label.

1. Where would you put a folder of confidential information in a drawer?
2. In the back
3. In the front
4. In the center
5. It does not matter

The folder than contains confidential information should be stored in the back of the drawer so that it is not easy to access. The drawer needs to remain locked.

1. What does not need to be updated for security when storing files on a computer?
2. Malware detector
3. Virus barrier
4. Virus detection
5. Downloads

It is important to use security software to protect the computer and update them regularly. Downloads do not necessarily need to be updated.

1. Where was the folder stored?
2. Desk
3. File cabinet
4. Drawer
5. All of the above

The folder was stored in the file cabinet. The key was kept in the desk drawer.

1. How long did it take money to go missing?
2. 10 days
3. 10 month
4. 8 months
5. 8 weeks

Money went missing from the accounts 8 months after the file was stored in the file cabinet.

# Module Ten: Share Office Procedure Guide

C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\VB4U418Z\MC900237108[1].wmfOnce you have completed the binder, you must share it with the rest of the office. At this point, communication is essential. Without the buy-in of key stakeholders, the procedure guide will not be a tool that gets much use. Getting feedback from executives and employees alike will ensure that your guide is effective and applicable to the needs of your audience.

## Give Guide to Boss/Executive to Review

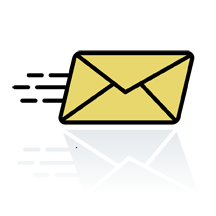
*Extremists think ‘communication’ means agreeing with them.*

***Leo Rosten***

![](data:None;base64,)The procedure guide needs to be reviewed by your boss or the executive in charge of your department before it is implemented. Superiors will be able to identify any gaps in information that need to be filled. Review any notes that your boss makes, and add the changes before returning the guide to the supervisor. Complete this process as many times as necessary until you are both satisfied with the result. After the guide has been reviewed, it is time to inform other members of the personnel.

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Consider the review process. |
| **Topic Summary** | **Give Guide to Boss/Executive to Review**  Explore reviewing the guide. |
| **Materials Required** | **13 - Procedures List (completed earlier)** |
| **Planning Checklist** | None |
| **Recommended Activity** | As a group, trade the completed procedures list with each other and review them. Offer feedback to each other. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | Who needs to review the guide? |

## Inform Office Personnel of Procedure Guide

The guide should be an essential tool used by the office personnel. You need to introduce the guide to everyone it can benefit. This requires more than a quick announcement in a meeting. There are different ways to introduce the procedure guide, and you may use more than one.

**Methods of introduction:**

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

Regardless of the method of communication that you choose, make sure to tailor the communication to meet the needs of your audience.

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Consider ways to introduce the guide. |
| **Topic Summary** | **Inform Office Personnel of Procedure Guide**  Discuss methods of information. |
| **Materials Required** | **Flipchart/board and marker** |
| **Planning Checklist** | None |
| **Recommended Activity** | Discuss different methods of communication along with their pros and cons. List these on the flipchart/board. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | Who needs to be introduced to the procedure guide? |

## Place Guide in a Visible Area

C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\SBWWZQPW\MC900200255[1].wmfOnce the guide is introduced, you must display it carefully. 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. If there is a common area for materials, place the guide in a prominent location in the area. You may also display it on your desk with the understanding that people may use it. Regardless of which location you choose, it is important that the guide be easily accessible.

|  |  |
| --- | --- |
| **Estimated Time** | **7 minutes** |
| **Topic Objective** | Introduce the importance of placement. |
| **Topic Summary** | **Place Guide in a Visible Area**  Consider where to place the guide. |
| **Materials Required** | **14 - Visibility** |
| **Planning Checklist** | None |
| **Recommended Activity** | Complete the worksheet individually, and share your answers with the rest of the class. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | How must the guide be displayed? |

## Allow Office Personnel to Express Improvements/Updates if Needed

C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\02FT6985\MC900082285[1].wmfNever underestimate the importance of feedback. The people who use the guide are the best ones to listen to when it comes to making improvements and updating the information. Do not simply wait for people to share their views. Provide employees with different opportunities to communicate with you.

For example:

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

Depending on the organization of the company, you may choose to allow employees to update the binder on their own.

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Consider feedback from personnel. |
| **Topic Summary** | **Allow Office Personnel to Express Improvements/Updates if Needed**  Discuss feedback methods. |
| **Materials Required** | **Flipchart/board and marker** |
| **Planning Checklist** | None |
| **Recommended Activity** | Discuss different methods of feedback. List them on the flipchart/board along with their pros and cons. If there is time, discuss the pros and cons of allowing employees to make changes to the binder themselves. |
| **Stories to Share** | Share any relevant, personal stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | Who will provide the best information about the guide? |

## Case Study

C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\VB4U418Z\MC900056433[1].wmfBrad completed the binder and reviewed it with his boss before displaying it in the break room. He expected to be inundated with questions and comments, but no one seemed to notice the new procedures manual. He brought it up in a meeting and discovered that most of his peers had no idea that the binder even existed.

|  |  |
| --- | --- |
| **Estimated Time** | **5 minutes** |
| **Topic Objective** | Introduce the Share Office Procedures case study. |
| **Topic Summary** | **Case Study**  Address the importance of informing people. |
| **Materials Required** | None |
| **Planning Checklist** | None |
| **Recommended Activity** | Discuss the results of the case study. How could Brad have avoided this problem? What can he do in the future? |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | How did Brad review the binder? |

## Module Ten: Review Questions

1. Why ask a superior to review the guide?
2. Find gaps
3. Give ideas
4. Change plans
5. You would not ask

The superior should review the guide before it is implemented. This allows you to identify any gaps.

1. How many times should you review the binder with your supervisor?
2. 3 times
3. 2 times
4. 5 times
5. Until you are both satisfied

There is no arbitrary number to determine how many times the binder should be reviewed. The binder needs to be reviewed until you are both satisfied.

1. What is Not a method of introduction?
2. Email
3. Test
4. Meeting
5. All of the above

The binder should be tested before it is introduced to employees. The other answers are methods of introduction.

1. What is true of the introducing the guide?
2. It does not need to be communicated
3. Only one method of communication should be used
4. Only one method of communication should be used at a time
5. Communication should fit the audience

Use more than one method of communication to identify the guide. The communication needs to fit the audience.

1. What will determine where the guide should be placed?
2. Tasks
3. Setting
4. People
5. Nothing

The setting of the office will determine where the guide should be placed. It must be visible.

1. The guide must be displayed in a location that is \_\_\_\_\_\_.
2. Uncluttered
3. Common
4. Accessible
5. None of the above

The guide must be placed in a visible location, but the location should also be accessible.

1. Who may update the binder?
2. Employees
3. No one
4. Consultant
5. All of the above

In certain organizations, all employees may update the binder. Consultants do not make updates.

1. What is least likely to be an opportunity for communication from employees?
2. Surveys
3. Meetings
4. One-on-ones
5. Website

Websites may or may not allow feedback. The other answers are methods of communication.

1. Where did Brad display the binder?
2. Break room
3. Meeting room
4. Office
5. Desk

Brad displayed the binder in the break room so that it would be visible.

1. Why didn’t Brad get many questions?
2. The binder was perfect
3. The binder was boring
4. The employees made changes
5. People were not aware of the binder

Brad expected questions, but he did not get any. Most people did not even know about the binder.

# C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\SSHSDPG0\MC900283365[1].wmfModule Eleven: Successfully Executing the Guide

*Success comes from taking the initiative and following up…*

***Anthony Robbins***

The guide must be executed with the same diligence that was used to create it. This requires training, consistency, and communication. 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

C:\Users\Owner\AppData\Local\Microsoft\Windows\Temporary Internet Files\Content.IE5\VB4U418Z\MC900390794[1].wmfAfter the guide has been introduced, it is important that employees are trained in how to use it. Extensive training is not necessary. A one-hour meeting or seminar should be sufficient to explain the guide. There are a few steps that you can take for the meeting:

1. Establish the outcomes that you expect.
2. Develop an agenda
3. Train the employees

**The agenda needs to include:**

* The topics addressed
* Objective
* Outline (with time limits to topic)

Adhere to the agenda once the meeting begins to ensure that the meeting stays on course.

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Introduce one-hour meetings. |
| **Topic Summary** | **Create a One Hour Meeting/Seminar**  Practice agenda. |
| **Materials Required** | **15 - Agenda** |
| **Planning Checklist** | None |
| **Recommended Activity** | Complete the worksheet individually, and share your answers with the rest of the class. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What needs to occur after the agenda? |

## Stay Consistent with Procedures

Once procedures have been implemented, it is important that they are consistently followed. There are different tools such as checklists to ensure that the procedures are followed. The most important factor in creating consistency, however, is leading by example. If the leaders and people who created the policies and procedures do not abide by them, then there is little motivation for the other employees to do so. Be sure to address inconsistencies as they occur. Do not wait to address problems until meetings or reviews.

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Explore the importance of consistency. |
| **Topic Summary** | **Stay Consistent with Procedures**  Discuss ways to increase consistency. |
| **Materials Required** | **Flipchart/board and marker** |
| **Planning Checklist** | None |
| **Recommended Activity** | Ask students to share different methods that they have used to help increase consistency. List some of these on the flipchart/board. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What is necessary once procedures are implemented? |

## Make Employees Aware of any Updated Changes

Policies and procedures will inevitably change over time, which is why communication is so important. You cannot simply assume that employees periodically read the binder to keep up with changes. You must communicate the changes directly to them using formal and informal methods. Formal methods used to communicate change include: email, meetings, and conference calls. Informal methods of communication include: lunch, events, and casual conversations. Be sure to use multiple methods of communication to reach as many employees as possible.

|  |  |
| --- | --- |
| **Estimated Time** | **8 minutes** |
| **Topic Objective** | Introduce the need to impart new information. |
| **Topic Summary** | **Make Employees Aware of any Updated Changes**  Discuss methods to communicate change. |
| **Materials Required** | **Flipchart/board and marker** |
| **Planning Checklist** | None |
| **Recommended Activity** | As the group to discuss different methods of communication, they have used and which ones were effective. List ideas on the flipchart/board. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | Why is communication important? |

## Keep Open to Improvements

It is essential that you do not become so attached to the binder you create that you stop looking for ways to improve it. This is also true in every area of life. You need to be open to new ideas, and you must maintain a dialogue with other people to hear them. You should go beyond simply using traditional feedback methods to discover ideas. New ideas can be found anywhere; you may hear something in a casual conversation, read something in a book, or hear something on the radio. By always being open to improvements, you will be able to keep the binder relevant and effective.

|  |  |
| --- | --- |
| **Estimated Time** | **7 minutes** |
| **Topic Objective** | Consider ways to be open to improvements. |
| **Topic Summary** | **Keep Open to Improvements**  Discuss ways to be open. |
| **Materials Required** | **Flipchart/board and marker** |
| **Planning Checklist** | None |
| **Recommended Activity** | Ask the group to share moments that inspired them to make improvements. What helped make them open to new ideas? List some thought on the flipchart/board. |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What is true in every area of life? |

## Case Study

![](data:None;base64,)Warren was instructed to implement the new policies and procedures outlined in the binder. Warren introduced the procedures to his employees and kept the binder in a visible location. The policies and procedures soon slipped his mind, and he fell back into old habits at work. Employees decided that the new policies and procedures were not important when they realized that Warren did not follow them himself. Soon, almost everyone chose to work without regard for the procedures outlined.

|  |  |
| --- | --- |
| **Estimated Time** | **5 minutes** |
| **Topic Objective** | Introduce the Successfully Executing the Guide case study. |
| **Topic Summary** | **Case Study**  Explore the importance of leading by example. |
| **Materials Required** | None |
| **Planning Checklist** | None |
| **Recommended Activity** | Discuss the results of the case study. Why do you think the procedures were ignored? What would correct the problem? |
| **Stories to Share** | Share any personal, relevant stories. |
| **Delivery Tips** | Encourage everyone to participate. |
| **Review Questions** | What were Warren’s instructions? |

## Module Eleven: Review Questions

1. How long should a meeting be to explain the binder?
2. 1 hour
3. 2 hours
4. 2 days
5. 8 hours

The binder can be explained in little time. A one-hour meeting is adequate time to explain the binder.

1. What is Not included in the agenda?
2. Topics
3. Training
4. Objective
5. Outline

Training may be a topic, but it is not necessarily part of the agenda. The other answers are part of the agenda.

1. What is the most important factor in creating consistency?
2. Binder
3. Engagement
4. Example
5. Employee buy-in

The most important factor in creating consistency is leading by example. Leaders must be consistent with procedures.

1. What will help ensure that the procedures are followed?
2. Binder
3. Steps
4. Supervisors
5. Checklist

There are tools that will help ensure that the procedures are followed. Checklists are used for this purpose.

1. What is Not a formal method of communication?
2. Email
3. Meetings
4. Conference calls
5. Casual conversations

Email, meetings, and conference calls are all methods of formal communication. Casual conversations are informal.

1. What would be the best method to communicate with employees?
2. Formal communication
3. It does not matter
4. Informal communication
5. Use multiple methods

It is best to use multiple methods of communication. This way more people will understand what is being communicated.

1. What increases new ideas?
2. Dialogue
3. Interest
4. Study
5. None of the above

Dialogue helps to increase new ideas, which helps create improvement.

1. Where are new ideas found?
2. In communication
3. In organization
4. Everywhere
5. Nowhere

New ideas can be found anywhere. It is important to be open to them.

1. Why did Warren not follow the procedures?
2. He disliked them
3. They were not current
4. Employees disliked them
5. He forgot

Warren did not blatantly ignore the procedures. He simply forgot to follow them.

1. Why did employees ignore the procedures?
2. They disliked them
3. Believed the procedures were not important
4. They did not receive them
5. All of the above

The employees believed that the procedures were not important. The idea developed by watching Warren.

# Module Twelve: Wrapping Up

Although this workshop is coming to a close, we hope that your journey to creating a functional administrative office is just beginning. Please take a moment to review and update your action plan. This will be a key tool to guide your progress in the days, weeks, months, and years to come. We wish you the best of luck on the rest of your travels!

*Nothing great was ever achieved without enthusiasm.*

***Ralph Waldo Emerson***

## Words from the Wise

* **Seth Godin:** There’s no shortage of remarkable ideas, what’s missing is the will to execute them.
* **Charles Darwin:** It is not the strongest of the species that survive, nor the most intelligent, but the one most responsive to change.
* **Thomas A. Edison:** Just because something doesn't do what you planned it to do doesn't mean it's useless.
* **Jack Welch:** Willingness to change is a strength, even if it means plunging part of the company into total confusion for a while.

## Review of Parking Lot

Review the items on the parking lot. Some items may need one-on-one participant follow up. You may be able to clear other items up now. Follow-up workshops may even be appropriate.

## Lessons Learned

* Understand the need for procedures
* Choose the best tools to create a procedures binder
* Know what to include in the binder
* Use feedback to guide the binder creation
* Implement the procedures effectively
* Be open to new ideas

## Completion of Action Plans and Evaluations

Do a quick round robin and ask everyone to share one thing that they learned today. Then, ask participants to make sure their action plans and evaluations are complete.

If possible, ask participants to buddy up and set up a follow-up system, so that they can check up on each other in the coming days, weeks, and months. If appropriate, provide your contact information in case they have any questions.