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Julie applies her administrative experience and passion for lifelong learning to serve as an enthusiastic mentor, speaker and author who teaches administrators around the world how to be more effective every day. Learn more about Julie's Books - Innovation Administrator: Uncover the power of innovation in your administrative career and organized administrator: Use your unique organization style to create systems, reduce congestion, and improve productivity, and become a Procedures Pro: Admin's guide to developing efficient office systems and procedures. And request a free copy of our special report From Reactive to Proactive: Creating Your Strategic Career Administrative Plan for www.AllThingsAdmin.com. Creating administrative procedures in an admin binder or shared disk folder may not be one of the most glamorous jobs in the office. But this is crucial both for full-time employees within the business and for those who are encouraged to help. Well-defined processes have a number of advantages, including consistent approaches and time savings. But how to create effective administrative procedures? 1. Determine which procedures are needed The first step is often the longest - to decide what procedures are needed based on the tasks that are performed around the office. You want the goal to find all the admin processes that are used, even if they are used once a month or once a year. You can categorize them by frequency in the administrator binder or shared folder, but at least they will be shown. Look at what people are doing and make a list of these processes that you can use to start building around how it's done. 2. Creating a Pattern Creation pattern is a good step to ensure that all your procedures take the same format. This also means that if you need to add more treatments at a later date, you can just take the template again and put it into use again. There are many many Empty templates are available online, but making your own is also very simple. Once it's in place, store a few blank copies in the back of the admin binder, and specify where the digital copy is stored. 3. Break up the process Once you know what processes you need to include in the link, it is time to start breaking down each process to create a series of steps that should follow. An example may include incoming mail: - Accounts, bank statements and invoices, as well as payments received by mail, sent to accounting journals and any flyers sent to marketing programs and other potential employee contacts sent to the human resources department - Any contracts or legal documents sent to legal entities can then break down the processes into what should happen to different types of mail in different departments. For example, bank statements must be stamped to date, obtained then checked for any questions and filed with the appropriate accounting binder. It is also worth noting on the procedure who is the person responsible for a particular result - such as John Smith in accounting or Jane Jones in marketing. This means that if there are any questions about the process, administrator employees can speak directly to that person. 4. Keep it simple and to the point that the administrator binder should not be beautifully written part of the content worthy of a place in the company's blog. Like many things you learn when you take Office Admin Courses in London, the purpose of the binder is to get through the most important information in the fastest and simplest format to allow people to act on it. 5. Check the procedure writing what you do in writing can be strange, so the best way to see if it worked is to have someone check the procedure. Choose someone who usually won't do this particular process to see if they can do it right by simply following the instructions in the binder. And get them to tell you if there is anything else you need to make it a complete and simple procedure. We really need it! Please share, follow or like us: We use cookies to provide you with the best experience. Full functionality may not be available if cookies are rejected. Administrative procedures are a vital component of any efficient office. They are an extremely valuable resource and their creation is a huge service for your manager and team. Not only do they allow others to easily cover for you while away or on vacation, they also act as a reference to you. Anatomy is good Many administrative professionals know that they need to have a binder procedure, but they are struggling with how to get started. Not knowing how to create a good procedure can be overwhelming. However, creating a complete, easy-to-understand set of treatments is easy when you take these seven tips. Tips. Understand that the handwritten procedure is still a well-documented procedure. Many administrators believe that procedures should be perfectly formatted and beautifully hired to qualify as a procedure. Not true. The handwriting procedure is as effective as the typewritten procedure. The goal is for someone to go through a task - it doesn't matter whether the procedure is handwritten or typed. 2 Use a template for consistency. Using a template to capture handwritten procedures can help keep them structured and consistent, especially if you don't have time to enter them immediately. You can download the template here: www.allthingsadmin.com/free-templates. If you have a template, print out a few blank copies, punch three holes on each page, and keep them in the file folder within reach of your chair's hands. Then you can grab the shape and create the procedure anytime you think of a new one. 3 Complete each task or process step by step. When creating a procedure, think about every step you take to complete it. Write the steps down just as you would sketch. Then go back and fill in the details or background information where necessary. 4 Think of a team, not a proposal. You want to be specific without being overly verbose. This is not a college research paper; it is the link of procedures. People are more likely to read simple commands than full sentences, especially if they are in a hurry. 5 Use bullets or numbers as much as possible. Number of steps that need to be completed in a certain order. Use pool lists for non-order specific instructions. 6 Provide screenshots for computer-related tasks. To make your procedures even more effective, create a graphic or visual, such as a screenshot of computer-related tasks to accompany printed or written instructions. 7 Ask another person to check your procedures. The best way to find out if your treatments will work is to let someone else check them out. Ask them to identify items that don't make sense and list any questions they have about the procedures. This will help you identify the gaps and fix them. Example Procedures: Sorting Mail To help you better understand what an effective procedure looks like, here's an example of a mail sorting procedure from two different administrative binder procedures in two different companies. Sometimes the procedures are very basic, like the first. Others are more detailed, as in the second example. Although they are very different, both are acceptable. Example 1: Sorting in-incoming mail All incoming accounts, bank statements, invoices and payments are the way to accounting. All incoming trade magazines and flyer exhibitions are the way to sales and marketing. All incoming resumes and thank-you notes are the route to HR. All incoming contracts are a route to legal. Any office equipment or postal with office supplies - leave in my mailbox. Last updated September 4, 2020. Patterns make your life easier by giving you a solid starting point and helping to ensure that you don't leave any important information. Why document office procedures in the first place? In other words, why create a guide to office procedures? Pro-Tip: If you are a remote employee or part of a team with remote employees looking for an effective way to stay connected, we recommend checking out Nextiva. Ideally designed for a modern distributed workforce, Nextiva Voice over Internet Protocol (VoIP) technology allows your employees to make clear calls from anywhere using a computer or phone. That's a good question. Common sense assumes leadership procedures are a good idea overall, but there are also a few specific benefits of creating a guide to office procedures: If you go on vacation, then everyone can use the guide to get your most important tasks. The guide helps your stand-up do what needs to be done, and it also brings you peace of mind because you will know your work is covered as well as covered properly; You wrote the guide, after all! If you need a new employee on board, you can provide a new recruit with copies of the manual. You will be able to easily explain all the processes and procedures as the new employee follows together, as everything will be clearly outlined in the manual. If you need to explain your responsibilities and processes for management, then you will have a well-documented account of all your key processes and tasks right on your savvy fingers. If you ever leave your current job, then you don't have to scramble to record all your processes before you leave. It will also benefit your replacement, and the company as a whole, to have a reference guide that hasn't been put together in a hurry. The templates and tips below help office managers and executive assistants document and share their subject subjects and true workflows. (PS - Join one of our private FB teams exclusively for executive assistants or office managers. A Guide to Office Procedures Guide to Best Practices Here's all you need to create an effective office procedure guide template. Start your guide with the sketches. According to Patricia Robb, author of Laughing All the Way to Work: A Survival Blog for Today's Administrative Assistant, you have to organize your duties in a logical format in the content table to outline how you want to place each item. Once you table the contents are complete, you can go back and fill in the details. Use your job description and any documentation from the latest reviews to pull out your basic responsibilities. Your guidance should cover, behind the fashion step, how to do each of these basic duties. Separate any policies that need to be documented from any procedures that need to be documented. According to the Bridge of Compliance, the policy defines a set of rules, such as how behavior, while the procedure determines the steps you must take to board a new employee. If you want someone to know why you're doing something, create and write down a policy. If you want someone to know how to do something, create and record the procedure. Write the guide in a clear and concise language. The mysterious guide to the procedure is almost useless. Here's a new office proverb for you: a procedure guide no one can understand won't do any good. Turn on the headlines and bullet points. In addition to writing routines in an understandable language, evoke important themes and takeaways using bold headlines, bullet points, tables and other visual elements that break down blocks of text. This helps any skim guide and move on to the appropriate sections. Include contact information for the person who owns the process, probably on their own. This helps anyone who needs to know who to contact if they have questions. Check the manual. Let someone who has no idea that you are reading the guide. After your colleague has read the manual, ask him to run around the game about what he will do any day. If it fumbles, then it is probably an error in manual writing or structure. Make a guide to finding a PDF. This allows people to search with far more sophistication than they can achieve, using only their eyeballs to skim your bullets and headers, no matter how well organized they are. Include the date the guide was created, as well as the date of the last update. This will help users check that they are getting current information. Provide flexibility and opportunities for each procedure. According to one policy writing guide, whenever possible, procedures should offer users options. Procedures that are unnecessarily restrictive may limit their usefulness. In some cases, people using the manual will simply be filled up and can't be firmly committed to following the T rules. Avoid including information that may become obsolete soon. For example, if the procedure involves collaborating with someone in the company, then you can simply use the title of the post rather than the person's name. When people leave the company, management will remain useful. Turn on the context when you need it. Identify any terms that may seem like jargon specific to your position, or clarify any procedures that may require some context to understand. For example, you can refer to the company's annual report as Annual. Be sure to refer to it as the company's annual report if you mention it in any procedures. If someone is considering a procedure, they may underestimate the importance of the annual and shortcuts if they don't know exactly what it is. Create an upgrade plan and a calendar. The Office Procedures Guide is not a static document, and it will require some revitalization every so often. You have to take care of it to keep it in working order. Able, organizational charts of departments and posts in your company to make sure that manual readers can connect the dots. Organize procedures and tasks according to frequency. If the procedure is a one-off or repetitive daily, weekly, monthly or annual task, then if it is a one-off or repetitive task, include how long each procedure is likely to take. This will manage users' expectations and help them effectively allocate their time. Patricia Robb also recommends that you include checklists to help users manually make sure they cover all critical procedures. Office Procedures manual templates use this template as many times as you need to cover all your basic responsibilities. Include the information below to outline the procedures for one task in the procedure manual. Target: Required Time: Departments involved: Positions involved: Positions involved: Why we do this: When we do this: Weekly: Weekly: Monthly: Every year: How we do it: Step 1: Step 2: Step 3: Step 4: Step 5: Key Delivery/Sign Completion: A Guide to Procedures Office Examples of Your Office Procedures Guide will probably be made of a number of tasks, some related and others completely separate. Obviously, the groups are related tasks together. Turn on the strings or thread charts to indicate the connection between the tasks. Illustration 1: Challenge: Take the office inventory of the diner required time: About 15 minutes Departments are involved: N/A; Everyone enjoys snacks, but the office manager is the sole person responsible for ordering snacks and taking inventory positions involved: N/A. This recital Why we do it: To make sure that our snack quantities reflect actual preferences and consumption throughout the office. When we do it: Daily: Twice, the first thing in the morning and the last thing of the evening. How we do it: Step 1: Count snacks. Step 2: Visit the total numbers. Step 3: A record number of each particular snack. Step 4: During your visit at the end of the day, restock snacks accordingly. Step 5: Progress any orders as needed. Key delivery/sign of completion: the diner is overworked. Example 2: Task: Creating a route for an executive steering committee meeting Required time: 30 minutes Departments involved: N/A; The committee is attended by the heads of all departments, but only the Administrative Team is involved in the creation of the route. Positions involved: Executive assistants for each major department chief will need to add route items as well as review and sign on to the final itinerary. Why we do it: The route is central to the success of every executive steering committee meeting. Managers take the route seriously and use it to plan talking points, presentations, and more. When we do it: Daily: Although occurs only once a week, the route planning process takes several days and begins well before the day before the meeting. Make several items every day to keep the route process as fast and simple as possible. How we do it: Step 1: Email other department heads' assistants to get their route points. Route. 2: Create the first route project using input from other EAs. Step 3: Send the project route to other EAO for review and approval. Step 4: Integrating feedback and polishing the final route. Step 5: Send a route to all attendees. Key result/completion mark: The route is distributed to all participants of the meeting at least one day before the meeting (Tuesday). Example 3: Challenge: Creating a manager's business travel itinerary. Time required: 1-2 hours Departments involved: N/A Positions involved: N/A Why We Do This: Routes are central to the success of executive business plans. When we do: As needed: You'll know you need to create a travel itinerary when the executive branch of the trip is coming up. How we do it: Key results/sign completion: The executive has a travel itinerary at least a week before the departure date. Have you ever created a guide to office procedures? What advice, tricks and recommendations kept you on track? Share your experiences in the comments below. (PS - Join one of our private FB teams exclusively for executive assistants or office managers. Office As Resources: 36 Office Decor Ideas to inspire the best work of your team 25 Epic Office Party Ideas that will have all buzzing in a few weeks 19 Kickass Office Organization Ideas for Maximum Performance 25 Creative Office Newsletter Tip Ideas, who actually get Read 101 Fun Office Games and Activities that do the work of awesome 15 Creative Office Layout Ideas that gets people super excited by 7 Fun Office Birthday Ideas that are as simple as the Pie On The Workplace Events Calendar: Office Activities for every part of the year we've given Office Pets free rein in the workplace - that's how it made our office better planning to move the office? Here's what you need to know, how to bring a genuine launch vibe to any office's Ultimate Guide on how to organize an office filing system for 18 Holiday Party Ideas, which are great fun for small companies, how to make your next exit company Unforgettable The only corporate checklist of planning events you'll ever need is a modern guide (responsibly) Drinking at work 7 creative ways to make Memorable New Employee Ads 21 Hilarious Office pranks that (I hope) don't get you fired 17 Swag Ideas Employees really want your A+ Cheat sheet to select the best conference call Full Guide to a successful company newsletter (with templates) How to throw a company's Twitter Email Copy Link Подробнее Подробнее developing an effective administrative procedures manual pdf

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