Developing an Effective Administrative Procedures Manual

Julie Perrine, CAP-OM, MBTI Certified
Founder & CEO, All Things Admin

BusinessManagement DAILY
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Today’s Agenda

• Why Procedures Are Vital To Every Office
• 5 Simple Steps To Creating Your Procedures Binder
• How to Document Clear Procedures
• What to Include and How to Fast Track Your Procedures Documentation
• Resources to Support Your Procedures Project
Disaster Planning & Recovery
Succession Planning
Career Value For YOU!

- Demonstrates Leadership & Initiative
- Less Hassle & Stress
- More Recognition
- Resume Builder
- Professional Portfolio Samples
The 5 Simple Steps

1. Assemble the Right Tools for the Job
2. Track Your Tasks for a Few Days
3. Document Your Top 5 Procedures (repeat)
4. Identify What Else To Include
5. Organize Your Binder for Use
Does this resemble your desk?
NOT Recommended
Recommended!
Step 1: Assemble the Right Tools
Step 2: Start Tracking Your Tasks

<table>
<thead>
<tr>
<th>Administrative Assistant Job Responsibilities</th>
<th>Daily</th>
<th>Weekly</th>
<th>Monthly</th>
<th>Quarterly</th>
<th>Yearly</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General Administrative</strong></td>
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<tr>
<td>Phone management and call routing</td>
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<tr>
<td>Calendar Management</td>
<td>Yes</td>
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<td>Filing, record keeping</td>
<td>Yes</td>
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<tr>
<td>Liaison between VPs, Dept Heads, and public/private officials</td>
<td>Yes</td>
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<tr>
<td>Correspondence - Letters, Memos, E-mails</td>
<td>Yes</td>
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<tr>
<td>Check Requests, Expense Reports</td>
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<td>Yes</td>
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<tr>
<td>Equipment requests</td>
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<tr>
<td>Maintain Dept. Manuals/ Processes &amp; Procedures</td>
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<td>Serve as resource person to other depts and staff regarding</td>
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<td>department procedures</td>
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<tr>
<td>Office Supplies - Ordering and storage</td>
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<td>Proofing/Editing Documents</td>
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<td>Mail Sorting, Distribution</td>
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<tr>
<td>Maintain department records / phone lists / contact lists, etc.</td>
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<tr>
<td>Promotional Material - Ordering and storage</td>
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<td>Website updates (intranet, Internet)</td>
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<td>Organizational Charts</td>
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<td>Payroll processing</td>
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<td>Special Projects</td>
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<tr>
<td><strong>Meeting / Travel / Event Planning</strong></td>
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<tr>
<td>Travel Planning - Air, Car, Hotel, Entertainment</td>
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<td>Travel Itineraries</td>
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<tr>
<td>Meeting Scheduling</td>
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<tr>
<td>Meeting/Agenda Preparation</td>
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<tr>
<td>Meeting Minutes, reports, related materials</td>
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</tr>
</tbody>
</table>
### VP Name #1

**Meetings / Committees / Commitments**

<table>
<thead>
<tr>
<th>Daily</th>
<th>Weekly</th>
<th>Monthly</th>
<th>Quarterly</th>
<th>Yearly</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:30 AM Team Status Mg.</td>
<td>Tuesday - Weekly Staff Mg.</td>
<td>4th Wednesday - Committee Mg.</td>
<td>Board of Directors Meetings</td>
<td>Summer - President's Retreat</td>
</tr>
<tr>
<td></td>
<td>Thursday - Weekly Scorecard Review Mg.</td>
<td></td>
<td></td>
<td>June - All Employee Picnic</td>
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<td></td>
<td>Wednesday - Noon: Rotary Mg.</td>
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</tbody>
</table>

### VP Name #2

**Meetings / Committees / Commitments**

<table>
<thead>
<tr>
<th>Daily</th>
<th>Weekly</th>
<th>Monthly</th>
<th>Quarterly</th>
<th>Yearly</th>
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<td>June - All Employee Picnic</td>
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<tr>
<td></td>
<td>Wednesday - Noon: Rotary Mg.</td>
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</tr>
</tbody>
</table>
Step 3: Pick Your Top 5 (repeat)
The Anatomy of a Procedure

Sample handwritten procedure

<table>
<thead>
<tr>
<th>Procedure Name:</th>
<th>Making coffee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category:</td>
<td>General information</td>
</tr>
<tr>
<td>Created By:</td>
<td>Your Name</td>
</tr>
<tr>
<td>Date:</td>
<td>5/23/11</td>
</tr>
</tbody>
</table>

Procedure Details:

1. Empty the pot and filter.
2. Rinse both. (Wash with soap and brush if coffee’s burned.)
3. Fill new filter with 1 level scoop (1 TBSP) of coffee.
4. Add 6 cups fresh water to pot.
5. Turn pot on and brew coffee.

Have someone test your procedure.

Other Notes:

- The coffee is purchased from the office supply catalog.
- Types of coffee we prefer: crème brûlée regular and French vanilla regular.
- Any questions call Ruth at ext. 413.

Use images where helpful.

Download your free procedures template at www.AllThingsAdmin.com/free-templates
**PROCEDURE NAME:** How to Make the Coffee

**CATEGORY:** General Info.

**CREATED BY:** Julie Perrine

**DATE:** 5/23/2011

**PROCEDURE DETAILS:**

1. Empty the pot and filter basket.
2. Rinse both (may need to wash w/soap & brush if allowed to burn on)
3. Fill new filter with 1 level scoop of coffee (scoop = 1Tbsp)
4. Add 20 cups of fresh water or bottled water to pot.
5. Turn pot on to brew the coffee.

**OTHER NOTES:** (See next page)

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**PROCEDURE NAME:**

- The coffee we normally purchase is by mail order from Sevalia.com
- When the package is half empty, check the supply cupboard. If there is not another package available, log on to sevalia.com and reorder.
  - Sevalia Login: jperrine
  - PW: newjgvalia
  - The types we prefer are:
    - ☐ Créme Brûlée Regular
    - ☐ French Vanilla Regular

Any questions: Ask Ruth R at Admins@allthingsadmin.com or (xxx) xxx-xxxx.
Run multiple copies of this two-sided template on 3-hole punched paper so you can grab a sheet and write down procedures quickly throughout the day or week. Promptly put them in your binder – even if they aren’t typed up yet. ANY documented procedure – even handwritten – is BETTER THAN no documentation at all! Get started today!

<table>
<thead>
<tr>
<th>PROCEDURE NAME:</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>CATEGORY:</td>
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<tr>
<td>DESCRIPTION:</td>
<td></td>
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<tr>
<td>CREATED BY:</td>
<td></td>
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<td>DATE:</td>
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<tr>
<td>PROCEDURE DETAILS:</td>
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<tr>
<td>WEBSITE:</td>
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<tr>
<td>LOGIN:</td>
<td></td>
</tr>
<tr>
<td>PASSWORD:</td>
<td></td>
</tr>
</tbody>
</table>
Step 4: What Should You Include

FAST TRACK IT:
What procedures are already documented that you can use?
How to Handle Basic Office Operations
What information/resources do I refer to on a regular basis?
Events, Meetings, Committees
Technology User Guides
Forms, Templates, Checklists

DAILY/WEEKLY ROUTINE SCHEDULE

BEGINNING OF THE DAY:
- Unlock doors
- Answer phones
- Check voice messages
- Login to PC
- Read Emails
- Check/Review Calendar: Julia, Bob, Erin, Jon, John
- Pick up notes/Emails from weekend
- Review IN TRAY items which came over the weekend
- Turn PC on
- Turn light on
- Meet with Julie to review priorities for the day

DURING THE DAY:
- Phones
- Mail
- Visitors
- Projects

END OF THE DAY:
- 3:00 PM - Check with Julie to see what else we need to get done before the end of the day.
- Review tomorrow's projects/tasks
- Review calendars for next day: Julie, Bob, etc.
- Clear IN TRAY.
- 4:30 PM - Print Bob's Daily Calendar Page for the Next Day (On Friday, print a week at a glance page for the next week also.)
- Clear desk top
- Lock any file drawers necessary
- 5:00 PM - Forward Phone, Log Out of Computer
- Turn light off
- Lock front door

WEEKLY ITEMS:
- Water Plants (Lobby, Bob's Office)
- Kitchen Cleaning Schedule Reminders & Follow-up
- Office Supply Ordering/Purchasing
- Stock - Lister in the fridge for lunch
- Team in list schedule

MONTHLY ITEMS:
- Office Cleaning Overtime Schedule Reminders & Follow-up
- Recycling Office Paper

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Administrative Desk Reference Template

SAMPLE FORM

[Insert Company Logo Here]

Meeting/Site Visit Planning Details

[Insert Date]: [City, State]

GREETING OUR GUESTS & SECURITY ISSUES
- What time are they planning to arrive at our offices?
- Who will meet them in the lobby when they arrive?
- Who will escort them to the meeting location?
- Is this meeting one that remains confidential and security is not notified?

YES or NO
- Is it okay to notify Security/Front Desk of our guests and their names?

YES or NO

NOTE: Offices and conference rooms in the Executive area are NOT to be used for break out phone calls, etc., during visits from outside parties.

OUR GUESTS:
How many guests will we have? Names & Titles

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Who is our main contact with [your visit] that I should be coordinating getting info to/him regarding meeting logistics?

Name: __________________________
Office #: ________________________
Cell #: __________________________
Fax #: __________________________

www.AllThingsAdmin.com
Disaster Prep / Recovery Information

- www.preparemybusiness.org
- www.ready.gov
FAST TRACK IT:
Team Up With Others
What NOT to Include
Step 5: Organizing & Maintaining It

Admin Binder Contents

1. General Info / Job Duties
2. Accounting Info
3. Facilities Info
4. Human Resources Info
5. Mail Info
6. Meeting/Event Planning Info
7. Office Machines Info
8. Office Supplies Info
9. Phones Info
10. Travel Info
11. Forms/Templates
12. Other Procedures

[NOTE: Change the order of the categories and/or change the category names as appropriate to your specific job. Then delete this note from the Table of Contents before printing your final copy.]
How often do you need to update it?
Updating and Revising Your Procedures
Sharing the Binder With Others
Be the Office Super Star!
Question & Answer Session

- Have a question for the speaker? Press “star” and then “1” on your phone to enter the queue.

- The moderator will open your line when it is your turn to speak.

- If, during the Q&A, your question has been answered, or you wish to remove yourself from the queue, press “star” and then “1”.

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- We’d love your feedback regarding the conference and other topics you’d like to hear about! Contact: jstrohecker@BusinessManagementDaily.com

Thank you for Participating!
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