Creating Your Office Procedures Manual in 5 Simple Steps

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Founder and CEO

Why Procedures Are VITAL to Every Office

- Business Continuity
- Disaster Recovery and Planning
- Internal/External Audits
- Succession Planning

Career Value for You!
Step 1: Assemble the Right Tools for the Job

- Sturdy 3-ring "D" binder that is about 1 1/2" to 2" wide

  Recommended: Wilson Jones Extended Cover Binders or Samsill Binders

- Create a fun, yet professional, cover and spine

- Tabbed dividers – 2 sets of 5-tab dividers

  Recommended: Avery Protect ‘N Tab Tabbed Sheet Protectors – 8 Tab Sets # 74161

- Heavy duty sheet protectors

- Create a permanent home for your binder on your desk
Step 2: Start Tracking Your Tasks for a Few Days

* TEMPLATE PROVIDED at www.AllThingsAdmin.com

If you don't already have an administrative procedures binder started, here are a few ideas on where to begin:

- Create a list of your specific job responsibilities and how often you handle them (daily, weekly, monthly, quarterly, annually)

- Create a list for each manager you specifically support and identify the types of recurring meetings, events, or items that you handle for them (daily, weekly, monthly, quarterly, annually)

Step 3: Pick Your Top Five Procedures and Document Them

How to document good procedures

- Use a template for consistency
- **Think COMMANDS, not sentences**
- Go through each task or process step by step (in detail).
  - Be specific without being wordy
- Number steps that must be done in a specific order
- Use bullets for non-order specific instructions
- Provide screen shots where helpful
- Have another person try them out

http://allthingsadmin.com/administrative-professionals/7-tips-for-creating-effective-administrative-procedures/

[INFOGRAPHIC]

Go through this process for your top five, then pick another five and keep building from there.
Step 4: What You Should Include In Your Procedures Binder (And what NOT to include)

- What procedures are documented for your position that you can include?

- How to handle basic office operations

- What information/resources do you refer to on a regular basis?

- What events, board meeting dates, or recurring committee meetings did you need to be aware of for planning purposes?

- Phone, Computer, Video Conferencing System User Guides
• What types of checklists, forms, or templates might be helpful?

• Disaster Recovery Information

  If disaster strikes, will you be ready?

  o  http://www.preparemybusiness.org/ - Read every page…and take full advantage of their FREE webinars and training series!
  o  www.ready.gov

Strategies for teaming up with others to create your procedures documentation:

What NOT to include…and how to handle that vital information:
Step 5: Organizing Your Procedures Binder for Ongoing Use and Success

How to Organize Your Administrative Procedures Binder

- Break it into sections
  Potential Sections to Include in Your Admin Binder
  - General Info
  - Department Specific Info
  - Accounting Info
  - Facilities Info
  - Human Resources (HR) Info
  - Mail Info
  - Meeting / Event Planning Info
  - Office Supplies Info
  - Office Machines Info
  - Phone Info
  - Projects Info
  - Travel Info
  - Forms / Templates Info
  - Other Procedures Info
  ______________________
  ______________________
  ______________________

- Create a Table of Contents and Tabbed Section Dividers

- How often should you update it?

Be the Office Super Star!

Connect with Julie Perrine online:

- Visit our website at www.AllThingsAdmin.com
- Follow me! www.twitter.com/julieperrine and www.twitter.com/procedurespro
- Become a Fan! www.facebook.com/AllThingsAdmin
- Connect with me! http://www.linkedin.com/in/julieperrine
MY PLAN OF ACTION

Step 1: Assemble the Right Tools for the Job

- Assemble the tools you need to create your portfolio:
  - Binder
  - Tabbed Dividers
  - Sheet Protectors
- Create a Binder Cover and Spine
- Create a General Table of Contents
- Create a Permanent Home for it on Your Desk

Step 2: Start Tracking Your Tasks for a Few Days

- Download the free templates to help you get started from: www.AllThingsAdmin.com/free-templates

Step 3: Pick Your Top 5 Procedures and Document Them

1. __________________________________________
2. __________________________________________
3. __________________________________________
4. __________________________________________
5. __________________________________________

When you have the first 5 created, PICK YOUR NEXT 5 procedures and begin documenting them! (REPEAT)

Step 4: Identify What Else to Include In Your Procedures Binder

- Review your notes from the webinar and your task list to help you think of other procedures you may need to create.

Step 5: Organize Your Binder for Ongoing Use and Success

- Update and finalize the sections and your table of contents.
- Share the binder with colleagues who cover your absences.
- Show the binder to your executive.

CELEBRATE A JOB WELL DONE!

Share your success with us at www.AllThingsAdmin.com/contact-us
Today’s crash course should have given you everything you need to get your procedures manual successfully launched!

For those who would like additional support, here are some resources we offer to support your success.

- www.allthingsadmin.com/free-templates
- www.allthingsadmin.com/admin-binder-options

Two fast-track options to help you get started quickly…e-book and toolkit!

Save 25% on
“5 Simple Steps Creating Your Administrative Procedures Binder” e-book and/or Administrative Procedures Toolkit (Digital Download Only)

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