Creating Your Office Procedures Manual in 5 Simple Steps

Presented by Julie Perrine, CAP-OM, MBTI Certified
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**

Administrative
Procedures Binder
for
[DEPT NAME]

[Insert Company Logo Here.]

Administrative Procedures Binder
for [Department or Your Job Title]

- **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)**

with coupon code: EMORY25