

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.**

- What types of checklists, forms, or templates might be helpful?

- Disaster Recovery Information

If disaster strikes, will you be ready?

- <http://www.preparemybusiness.org/> - Read every page...and take full advantage of their FREE webinars and training series!
- 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!

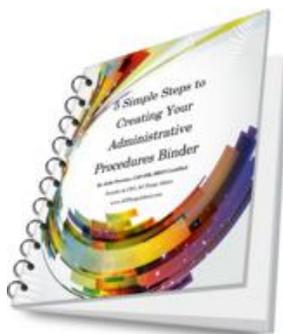
Share your success with us at www.AllThingsAdmin.com/contact-us

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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