Kick-start Creating Your Administrative Procedures Binder

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Founder and CEO, All Things Admin

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Why administrative procedures are VITAL to every office:

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
Step 1: Assemble the Right Tools for the Job

❖ **Sturdy 3-ring "D" binder that is about 1 1/2" to 2" wide** and in a **color that is unique** from all of the other binders on your desk, if possible.

❖ **Create** a fun, yet professional, **cover and spine** to clearly identify the contents of this binder on your desk.

❖ **Tabbed dividers** – 2 sets of 8-tab dividers

❖ **Heavy duty sheet protectors** for the commonly referred to lists, checklists, forms, and templates that will receive the most use.

❖ **Create a permanent home for your binder on your desk** that is easy to reach from your computer and when you are on the phone.

❖ **Create a general table of contents** listing the overall sections and the forms included in each section for quick fingertip reference. Do **NOT** include page numbers as those can change quickly if you are regularly updating the binder.
Step 2: Start Tracking Your Tasks for a Few Days

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

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

This will also help you determine what you need to document. Think about starting with a short checklist of the things you do to start the day, end the day, etc.

<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>General Administrative</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone management and call routing</td>
<td>No</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Calendar Management</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Filing, record keeping</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Liaison between VPs, Dept Heads, and public/private officials</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Correspondence - Letters, Memos, E-mails</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Check Requests, Expense Reports</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Equipment requests</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maintain Dept. Manuals / Processes &amp; Procedures</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Serve as resource person to other depts and staff regarding department procedures</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office Supplies - Ordering and storage</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proofing/Editing Documents</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Mail Sorting, Distribution</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Maintain department records / phone lists / contact lists, etc.</td>
<td></td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>Promotional Material - Ordering and storage</td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>Website updates (internet, Internet)</td>
<td></td>
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<tr>
<td>Organizational Charts</td>
<td></td>
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<tr>
<td>Payroll processing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special Projects</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meeting / Travel / Event Planning</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Travel Planning - Air, Car, Hotel, Entertainment</td>
<td></td>
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</tr>
<tr>
<td>Travel Itineraries</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Meeting Scheduling</td>
<td></td>
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</tr>
<tr>
<td>Meeting/Agenda Preparation</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Meeting Minutes, reports, related materials</td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Event Planning - Planners, Retreats, etc.</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Schedule meeting rooms, catering, audio visual</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attends meetings (specifically list them out...)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Admin Meeting - Wednesdays at 8:30 AM</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Participates on committees (specifically list them out...)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activities Committee - 4th Wednesday of Month</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Other Responsibilities</td>
<td></td>
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</tr>
</tbody>
</table>

 Templatem Provided at http://www.allthingsadmin.com/free-templates/
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)

<table>
<thead>
<tr>
<th>VP Name #2</th>
<th>Meetings / Committees / Commitments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily</td>
<td>Weekly</td>
</tr>
<tr>
<td>8:30 AM</td>
<td>Team Status Mtg.</td>
</tr>
<tr>
<td>Tuesday</td>
<td>Weekly Staff Mtg.</td>
</tr>
<tr>
<td>Thursday</td>
<td>Weekly Scorecard Review Mtg.</td>
</tr>
<tr>
<td>Wednesday</td>
<td>Noon: Rotary Mtg.</td>
</tr>
<tr>
<td></td>
<td>4th Wednesday - Committee Mtg.</td>
</tr>
<tr>
<td></td>
<td>Board of Directors Meetings</td>
</tr>
<tr>
<td></td>
<td>Board Executive Committee Mtg.</td>
</tr>
<tr>
<td></td>
<td>Summer - President’s Retreat</td>
</tr>
<tr>
<td></td>
<td>June - All Employee Picnic</td>
</tr>
</tbody>
</table>

Activity: “First 15 Minutes” of Your Workday Activity

Think about the first 15 minutes of your workday. List all of the things you do once you arrive at the office to get your day started.
How to Create Good Procedures

- Use a template to keep you on track and consistent from process to process.

- Go through each task or process step by step (in detail).

- Think commands, not sentences. Be specific without being excessively wordy.

- Use bullets as much as possible.
  - Number steps that must be done in a specific order.
  - Use other bullets for non-order specific instructions.

- Provide screen shots or images where helpful.

- Have another person try the procedure.

Additional Tips

It’s o.k. if your documentation is handwritten notes to get things started!

This reference tool doesn't have to be the most perfectly formatted book in your office, it just needs to be functional and available to the person(s) who may need to assist in your absence.

Put a note inside the front cover (see sample in Appendix) and tell those who cover for you to create a list of the things you didn’t have documented or that they had questions on how to handle. Then you can fill in those details on your procedures when you return.
Procedures Example: Mail Sorting

For example, if you have "sort and distribute incoming mail" as something you do daily, add some details to your procedure about how you sort it and route it. It may look something like this:

Sort the Incoming Mail
- All incoming bills, bank statements, invoices, payments - Route to Accounting
- All incoming trade magazines and trade show flyers - Route to Sales and Marketing
- All incoming resumes and interview thank you notes - Route to HR
- All incoming contracts - Route to Legal
- Any office equipment or office supply mail - Leave in my inbox

OR

Sort the Incoming Mail
- Contracts
  - Photocopy the incoming contract.
  - 3-hole punch the photocopied contract and put it in the executed contracts binder on [Name of Person’s] 3rd bookshelf inside her office door.
  - Forward the original contract to [Name of Person] in Legal.
  - If you have any questions regarding contract routing, contact [Name of Person] at [phone number] or [email address].
- Bank Statements
  - Open the envelope.
  - Stamp the statement with the date received stamp.
  - Forward the statement to [Name of Person] in Accounting.
  - If you have any questions regarding bank statement routing, contact [Name of Person] at [phone number] or [email address].
- Trade Publication or Trade Show Flyers or Marketing Related Mail
  - Forward to [Name of Person] in Marketing.
- Invoices (Accounts Payable)
  - Open the envelope.
  - Stamp the invoice with the date received stamp.
  - If it’s an office supply or office equipment related invoice, verify that the amounts and charges match what you anticipated for the month. Refer to my office supplies folder to match up my individual order confirmations with the monthly statement.
  - Initial the amount.
  - Forward to [Name of Person] in Accounting.
  - If you have any questions regarding Accounts Payable routing, contact [Name of Person] at [phone number] or [email address].
Step 3: Pick your top five (repeat)

Choose the top five (5) daily items from your list you created in step 2 and begin to develop a step-by-step procedure for how to accomplish those items.

Or ask yourself, what are the 5 most important things someone would need to know if they were filling in for me today?

1. ____________________________

2. ____________________________

3. ____________________________

4. ____________________________

5. ____________________________

REMEMBER:

• It’s o.k. if they are only handwritten to get things started.

• Five documented procedures is five documented procedures – no matter how they look!

• When you use the template, they already have consistency and structure built in.
STEP 4: Identify What Else to Include…and What NOT to Include

Pull from materials, documentation, and resources that may already be completed without recreating them.

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

- Start with your job description.

- Ask co-workers or other admins in your company.

- Ask your accounting department for procedures on how to complete expense reports, check requests, etc.

- Ask your travel department or provider.

- Ask your mail room.

- What other departments do you interact with that may have documented procedures relevant to your position already created?

- Google it! If you are looking for user guides for phones, voicemail, office equipment, etc., do a specific Google search with make, model, and type of “user guide” you need.
What types of checklists might be helpful?

- Daily or Weekly Checklists
- Daily Start-up or Shut-Down Checklists
- HR Checklists for New Hires, Terminations, Employee Setup
- Event or Meeting Planning Checklists
- Travel Planning Checklists

What forms or templates do you use regularly?

- Fax Cover Sheets
- Accounting Forms / Templates
- Travel Forms / Templates
- Event & Meeting Planning Forms / Templates
- HR Forms / Templates
- Shipping Forms / Templates
- Sales and Marketing or Corporate Board PowerPoint Templates
- Other forms or templates…
Activity: Brainstorm Procedures to Create

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What NOT to include…and how to handle that vital information:

Passwords

- Know your corporate policies on sharing this information.
- You may need to write some of this down depending on the type of password information you're documenting. Keep it in a separate file in a locked drawer if you must document it.
- Consider keeping one password-protected spreadsheet saved on your computer in a shared area where both you and your boss can access the information. Then all you and your boss need to remember is ONE password.
- Use a “base password” with a unique ending related to each site or login you use. For additional security, change your “base password” at least once a year.

  For example: Let’s say my base password for all of my passwords is “AdminsRock11”. For each specific site I use a unique ending related to that site such as the first 4 letters of the website. For Gevalia.com, my password would be: AdminsRock11geva.
  In your documentation, you could simply put this for the password: basegeva.
- Consult with your employer on best practices for your documentation of confidential information.

Credit Card Information

Social Security Numbers

Dates of Birth

Highly Confidential Information

This is all information that most admins have and/or maintain for the executives and teams they support. The key here is NOT to have it openly accessible to anyone walking by your desk who could pick up your administrative procedures binder.
DISASTER PLANNING: If disaster strikes, will you be ready?

Whether your company currently has a formal disaster recovery plan in place or not, here are some things you can do right now to proactively prepare yourself and your company if disaster strikes.

1. **Find out if your company has a disaster recovery plan.** If so, ask if you can get a copy of the plan. Read it and familiarize yourself with what it contains. If you have questions, ask them. You may be able to identify gaps or holes that should be addressed. Don’t be afraid to speak up.

2. **Educate yourself on Business Continuity Planning (BCP) and Disaster Recovery Planning.** Start with these awesome sites:
   - [http://www.preparemybusiness.org](http://www.preparemybusiness.org) - Read every page…and take full advantage of their FREE webinars and training series!
   - [www.ready.gov](http://www.ready.gov)

3. **Download, print, and assemble in a binder all of the free templates and files from [http://www.preparemybusiness.org/](http://www.preparemybusiness.org/).** Use these as your personal guide to creating your own disaster recovery plan/kit. Even if your company has a “master disaster recovery plan”, you still should create an individual plan for your position/team if one doesn’t already exist.

4. **Start creating a disaster recovery plan for yourself and your immediate team.** For starters, you’ll want to include:
   - **Emergency Contact Lists** – company executives, team members, home phones, cell phones, email addresses, etc.
   - **Key Vendors/Suppliers Contact Lists** – names, emails, office phones, cell phones, etc.
   - **List of vital files, paperwork, equipment, machines you’d need to work remotely**
   - **Contingency plans for fire vs. water vs. power loss emergencies.** E.g. In case of fire, you might need to act or do things differently than you would with a power outage.

5. **Share your plan with your team and get their feedback** and ideas on how to make it better or more complete. Once you’ve taken the initiative to get things rolling, stick with it until you have it fully assembled. Then make sure everyone on your team knows the procedures and has access to the information you’ve assembled in case of emergency!
Recommendation for maintaining confidential information:

urved Keep a brightly colored file folder for each executive or team you support that is labeled – “Admin Info for Executive Name” or “Executive Name – Admin Info”.

urved Place this file at the back of a file drawer that is locked when you’re out, your area is unattended or after hours.

urved Make sure your executive (or the appropriate person) has a key and knows how to access this information if you are out of the office.

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

urved ASK.

urved Be willing to collaborate. If you want them to help you, be willing to help them.

Be able to “sell” the idea by showing them how it will benefit them also. Benefits sell!
Step 5: Organizing Your Procedures Binder for Ongoing Use & Success

How to Organize Your Administrative Procedures Binder

げる Break it into sections

Potential Sections to Include in Your Admin Binder

- Accounting Info
- Admin Info
- Calendars / Meeting Dates
- Catering / Menu Planning
- Contacts/ Phone #’s
- Daily/Weekly/Monthly Checklists
- Department Specific Info
- E-mail Distribution Lists
- General Info
- HR / Attendance / Payroll Tracking Info
- I.T. Info
- Mail Distribution
- Meeting / Event Planning
- New Employees Info & Setup
- Office Supplies
- Person Specific Info
- Phone Info
- Projects
- System How To’s
- Travel Planning

________________________________________

________________________________________

________________________________________

________________________________________

________________________________________
Create a Table of Contents and Tabbed Section Dividers

- Use numbered tabs vs. named tabs

Insert a “how to use this binder sheet” at the beginning at the binder for those filling in for you

- Use the Template provided in the Appendix to get you started.

How often to update your procedures binder

- Write notes in your binder on the pages that need updates as you realize them.

- If you have time to update it on the spot, do it. If you don’t, come back and do it when you see you have several pages with marks or post-its with additional information included on them.

- Reviewing it on a monthly or quarterly basis depending on how busy your office is and how many changes occur from week to week or month to month.

- Add a reminder to your Outlook Calendar or Tasks so you don’t forget.

Tips to make updating or revising this binder easier:

- Create an electronic folder called "Admin Binder". Create a desktop shortcut to this folder for easy access.

- Add the document path and file name to the footer of each document before you print it.

- Do not store multiple copies of the same file in multiple online folder locations.

- Setup a SharePoint site or a shared internal online folder. For external shared folders, you may check into a free, secure site like Dropbox.com.
How to share the materials with those who cover for you

🪴 Give those who cover for you a chance to preview it or flip through it before your next scheduled time off.

🪴 Make sure those who cover for you (and your boss) know where the binder lives on your desk.

🪴 It may take a little time for everyone to get used to having something to refer to while you're away. Just keep reminding them that the tool is there for their use.

How to present the materials to your executive or manager

🪴 Place it prominently on your desk so they see you using it. When the time is right to put it in their hands, and do it; give them some time to review it.

🪴 Before you take your next vacation or time off, make sure you show the binder to your boss again to remind them that this awesome tool now exists.

🪴 Make it part of your weekly or monthly one-on-one meetings to review progress. This provides built in accountability to keep adding to it until it’s substantially completed, too!

🪴 Use it before and/or during your annual performance review time. This is a major accomplishment, so make sure it gets noted on your review documentation.

Additional Benefits/Uses for Your Administrative Procedures Binder

🪴 Use elements of this for your personal professional portfolio

Be the Office Super Star!
APPENDIX

RECEPTIONIST
DAILY / WEEKLY ROUTINE SCHEDULE

BEGINNING OF THE DAY:
- Unlock doors
- Unforward Phones
- Check voice messages
- Login to PC
- Read E-mails
- Check/Review Calendars: [Your Own, EXEC, EXEC, EXEC]
- Pick up notes/mail from weekend.
- Review IN TRAY Items that came over the weekend.
- Turn RICOH copier on.
- Turn lamp/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-ish – 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-ish – Print EXEC’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 lamp/light off
- Lock front door

WEEKLY ITEMS:
- Water Plants (Lobby, EXEC’s Office)
- Kitchen Cleaning Schedule Reminders & Follow-up
- Office Supply Ordering/Purchasing
- Stock water in the fridge for Exec. Guests
- Team in/out schedule

MONTHLY ITEMS:
- Office Cleaning/Dusting Schedule Reminders & Follow-up
- Recycling Office Paper
How to Use This Administrative Procedures Binder

If you’re reading this right now, then you’re probably filling in for me while I’m out of the office. Let me start by saying, “THANK YOU!”

Here’s how you’ll benefit the most from the information included in this procedures binder:

- Take a few minutes to familiarize yourself with the various tabbed sections of information included in this binder so you know what’s here in case you need to refer to it.

- As you use the procedures outlined here, please make notes about anything that didn’t make sense or could use additional clarification for future updates. This will help me make this tool even more useful in the future.

- If there were any procedures missing completely, please write them down and leave the list inside the front cover for me to review upon my return.

Thanks again for your assistance during my absence!

[Name]
[Title]
[Department]

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Additional Resources

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

3 Options to help you get started quickly…e-book, binder, and course!

COUPON CODE: ___________
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