Creating an Administrative Procedures Manual

7 Steps

Step 1: Initial Considerations:
- Identify a storage “platform”; will you use:
  - A binder: 3-ring “D”, 1 1/2” to 2”, Tabbed dividers – Heavy duty sheet protectors?
  - Create a digital document folder to place on your shared drive?
  - Use One Note/EverNote/Software Programs?
- The big picture: consider the processes or procedures applicable to the execution of your position:
  - Start by answering the following:
    - What basic office operations do I execute?
    - What information, websites, shared drives, and resources do I refer to on a regular basis?
    - What events, special and/or recurring committee meetings do I coordinate?
    - Are there existing Phone, Computer, Video Conferencing or other System User Guides?
    - What types of checklists, forms, or templates might be helpful?
    - Should I include Disaster Recovery Information? (Or create it?)
    - How can I team up with others to create procedures?

Step 2: Time Tracking
- Create a simple paper (or digital) table that identifies core position responsibilities
- Use Toggl or another free online time tracking tool
  - Identify top 10 areas of time investment

Step 3: Outline Positional Core Responsibilities & Time Investment
- List core job responsibility’s and how often you handle them preferably in a spreadsheet format that is sortable
  - Annually, Quarterly, Bi-Monthly, Monthly, Weekly, Bi-Weekly, Daily, etc.
Step 4: Outline Core Responsibilities on Behalf of Individuals You Support

- List of core job responsibilities for the individual/s you support with notes on frequency
  - Annually, Quarterly, Bi-Monthly, Monthly, Weekly, Bi-Weekly, Daily, etc.

<table>
<thead>
<tr>
<th>Name:</th>
<th>Position:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Daily</th>
<th>Weekly</th>
<th>Bi-Weekly</th>
<th>Monthly* / Bi Monthly**</th>
<th>Quarterly</th>
<th>Annually</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:30 AM Print Task List</td>
<td>Exec.Team Mtg. Tues. 3:00 PM</td>
<td>City Club Meeting Wednesdays 12-2:00 PM</td>
<td>*Second Tuesday 11:00 – 1:00 PM Leadership Enrichment</td>
<td>Last Friday of each Quarter: Employee Open Q&amp;A</td>
<td>3rd Week of August: Board Retreat</td>
</tr>
<tr>
<td>4:30 PM Send Call Log</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2nd Week of January: Company New Year Party</td>
</tr>
</tbody>
</table>

Step 5: Isolate & Document Procedures

Documentation Methods:

Consider starting with a simple process or two. Then choose which process to outline based on the frequency of execution or highest priority based on the results of your time study (Step 2)

- Depending on the level of complexity for a given task or process
  - Start with a MACRO map to identify (5-7) high level steps
  - Break these larger process steps into smaller steps
    - “Walk” or think through each task or process in a step by step format
      - This can be done with a workflow map or step by step steps written in a text format
    - Drill down to identify each step and the specific order of the step
    - Number the steps at high levels and sub levels
      - Use Bullets & Formatting
    - Include supplemental information using hyperlinks, screen shots or a “hardcopy” of a form to show the correct completed form. (Think UPS form for example)
    - Consider creating a video tutorial where applicable
    - Create a template to promote consistency
      - Integrate a header or summary table at the beginning of each process

<table>
<thead>
<tr>
<th>Category</th>
<th>Travel, Meetings, Office Supplies, etc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>1-2 Sentence Summary</td>
</tr>
<tr>
<td>Originally Created/Updated By</td>
<td>Name</td>
</tr>
<tr>
<td>Date</td>
<td>Date originated and/or updated</td>
</tr>
<tr>
<td>Notes</td>
<td>Notes or Comments Does this relate to another procedure, are their password requisites, website log-ins or security notations to identify.</td>
</tr>
</tbody>
</table>
Step 5: Isolate & Document Procedures (Continued)

- Note the formatting you use; font, style, size, etc. so they are available as you (or someone else) develops future procedures
- Avoid using employee names, rather use the positional description, i.e., rather than “Obtain approval from Sally” write the step as “Obtain approval from Director of Human Resources”
- Keep verbiage crisp, short and succinct these are instructions vs. sentences
  - Keep them succinct, like directions on a consumer product such as a cake mix!
- Test for accuracy by walking through the procedure yourself
- Could someone “off the street” execute if they followed the same directives?
- Ask a co-worker to test the accuracy of the procedure

The following links provide ideas for Sample Procedures; some simple others more complex
Develop procedures in a format that is consistent and supports the execution of work for your position and/or organization.

Telephone Answering Procedures Written Format
Telephone Answering Procedures Self Paced Online Format

Step 6: Organizing Procedures

Whether housing your procedures in a digital workspace or a hardcopy format (or both), you will want to divide the manual into sections and also include a table of contents and or an optional index.

- Create the sections based on common themes and tasks for example Office Supplies, Meetings, Events, Human Resources, Facility Management, Accounting & Finance, Communications, Travel, Forms, etc.
- For hardcopy binders create a section divider for each section (example below), include tabbed dividers and use sheet protectors. For Digital repositories create a visual directory with hyperlinks to individual sections and a hyperlinked Table of Contents (example below).
• Insert page numbers and a file path (as preferred) in the document footer of each page
• Use Meta Data as desired
• Create a table of contents for each subsection as desired.
• Create an introduction page for the binder, i.e., a "How To Use" this manual overview

Step 7: Other Considerations

• Create an ongoing maintenance plan and schedule calendar/project time for updates
• Create a communication channel so others can offer ideas and suggestions for updates and additions
• Share the manual with team members as well as with your manager, boss, and key executives.

Summary:

Start SMALL! You might even start by answering just one of the questions in step 1. This should be fun and creative for you.