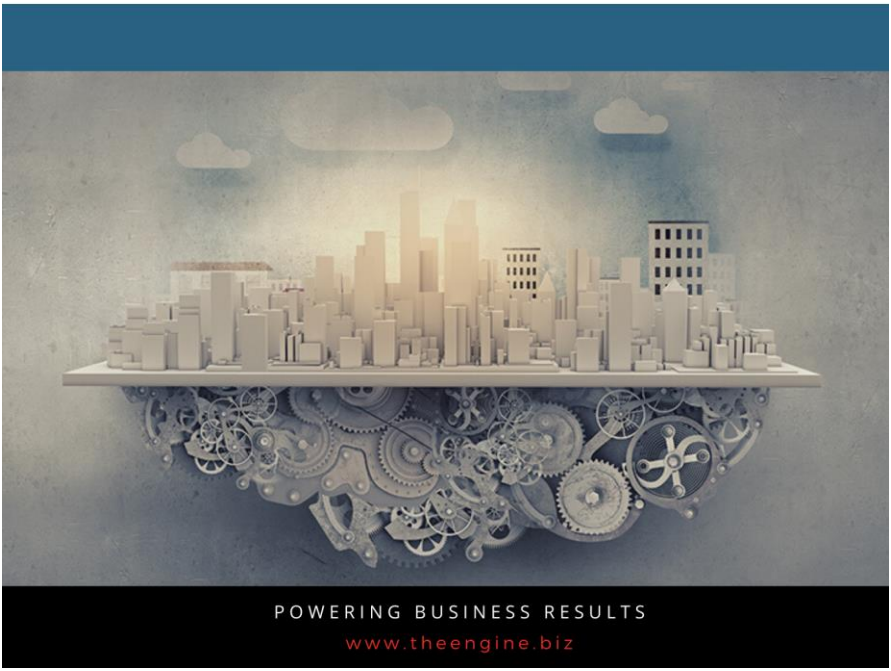
THE ENGINE™
POWERING BUSINESS RESULTS

Administrative Office Procedures



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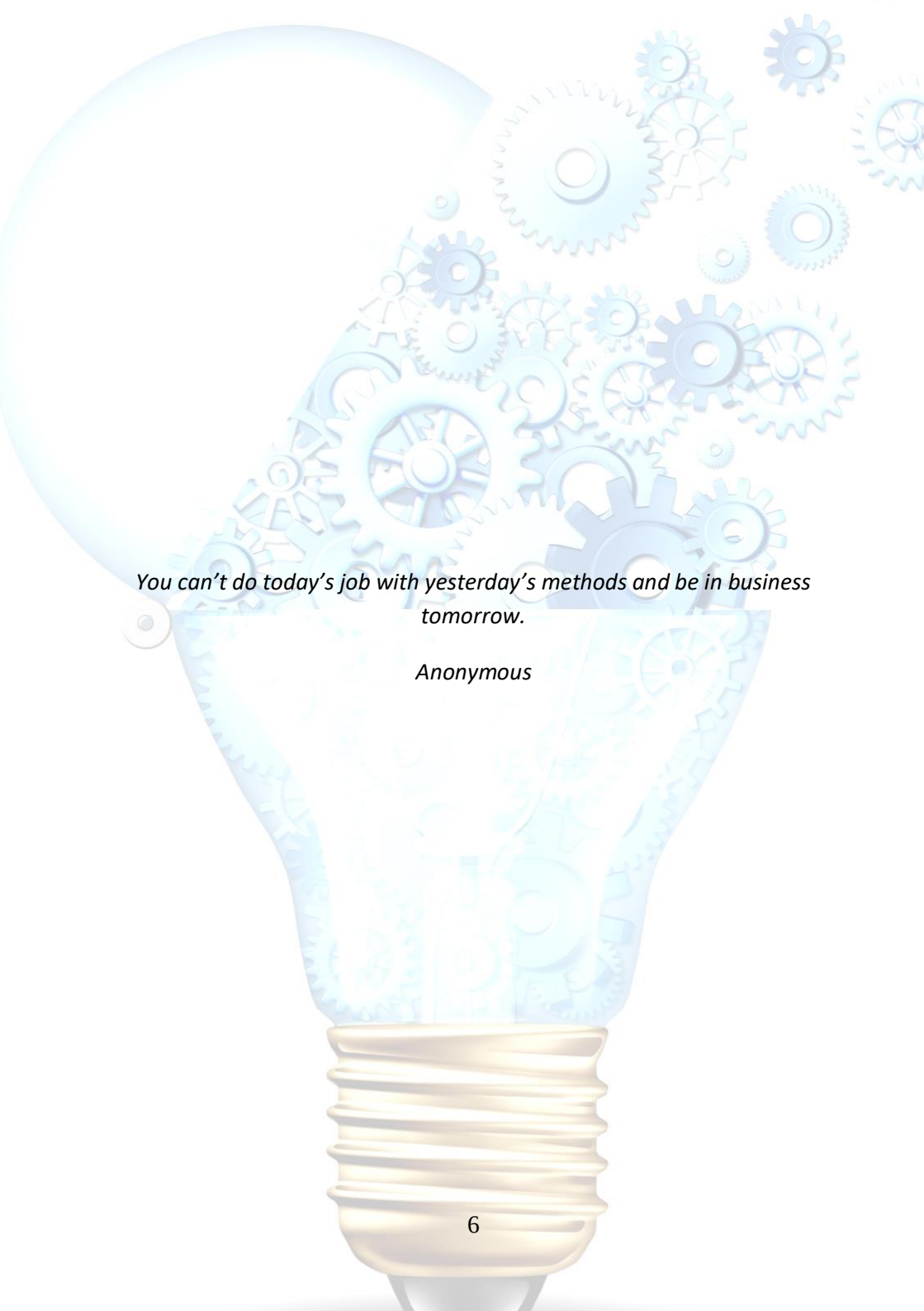
An essential aspect of creativity is not being afraid to fail.

Edwin Land

Preface

Administrative office procedures may not be glamorous, but they are essential to the success of any enterprise. A well-run office reduces miscommunications and helps to eliminate common errors. By making the administrative office a priority, you will establish clear policies and procedures with employee understanding and buy-in, which ensures that your work environment runs smoothly.



You can't do today's job with yesterday's methods and be in business tomorrow.

Anonymous

Chapter One: Why Your Office Needs Administrative Procedures

Administrative procedures are more than mundane policies. They are put in place to ensure the survival of the company in any event or situation. From catastrophes, to change, to basic day-to-day activities, administrative office procedures address them all when they are done correctly. Business continuity, succession planning, audit requirements, and recovery planning are all included in administrative procedures.

Business Continuity

Business continuity is also known as business continuance. It is the plan in place to keep a company running in the event of a disaster, both during and after the disaster. Establishing business continuity requires identifying essential tasks first. This includes items and services that are critical for the organization to function. These will vary by organization but they include technology, employee safety, sound structure, etc.

Business Continuity Steps:

- Determine risks that the company will likely face (weather, IT, sabotage, etc.).
- Analyse the effects of each risk or hazard that you discover on different aspects of the company (safety, functions, assets, etc.). Determine how long your company could function if one of these risks came to pass and what recovery would require.
- Develop a team and strategy to address the potential problems.
- Develop a plan and document each step before sharing it with the rest of the team.
- Test the plan using different methods such as drills, walkthroughs, and checklists.

Succession Planning

Successful succession planning develops a pool of talent so that there are more than enough qualified candidates to fill vacancies in leadership. This strategy requires recruiting qualified talent, creating a talent pool, and instilling loyalty in employees.

- **Identify goals and objectives:** Common goals include profitability, employee loyalty, service, and productivity.
- **Identify needs in the company:** Consider changes in the responsibilities of different positions the company develops.
- **Recognize trends in the workforce:** Understand the changes occurring in within and without your organization, such as an aging workforce.
- **Develop the employee pool:** Determine where to find employees to fill in the gaps (within, recruiting drives, social media, etc.), and develop a plan to engage them once they are chosen.

Internal and External Audit Requirements

Both internal and external audits are important for identifying risks that organizations face. The internal audit addresses how effective and reliable administrative controls are. An internal audit also addresses record accuracy, legal compliance, and management action. Internal audits and external audits are similar, but the internal auditor is an employee of the company that he or she audits. The external auditor is not an employee, and he or she will create a report based on the finances, operations, and compliance of companies. Both internal and external auditors provide recommendations based on their assessments.

The auditor, whether internal or external, is required to be independent and objective, qualified, provide adequate testing, provide adequate documentation and action, offer verification and review, and give a report that will be reviewed by relevant parties, such as the board of directors.

Recovery Planning

Recovery planning goes hand-in-hand with business continuity. Recovery planning or disaster recovery planning is the process that is put in place to recover data, software, hardware, and manpower that the company needs to start back up after a disaster.

Recovery Planning Steps:

- Identify critical systems and prioritize them, and identify potential risks.
- Determine strategies for data, technology, suppliers, people, and facilities.
- Create a plan with step-by-step instructions based on the strategies discovered.
- Test the recovery plan and make adjustments as necessary.

Practical Illustration

Sharon worked at the same company for 26 years. She was coming close to retirement and asked her supervisor if her help was needed training her replacement. She was surprised to learn that no one was in the running for her position, and she retired in a month. Her supervisor explained that they were having trouble finding someone qualified to replace her.

Give us the tools and we will finish the job.

Winston Churchill

Chapter Two: Gathering the Right Tools

Any activity requires the use of the correct tools, and the administrative office is no exception. Administrative binders and other materials are necessary tools that ensure tasks are completed correctly. By gathering the necessary information and finding these tools, you will eliminate confusion and ensure that your procedures are done correctly.

Binder

Administrative binders contain instructions on administrative procedures that all employees will be able to use. Begin by choosing a binder and collecting the necessary dividers and sheet protectors. Creating a binder requires you to keep track of the day-to-day operations. You must also develop a list of responsibilities for different jobs. The list should include daily, weekly, monthly, and annual tasks. The binder needs to include basic procedures. Begin with the job descriptions and interview different employees to determine their tasks. We will discuss what information is needed and how to collect it in depth in the next chapter.

The binder should also include basic resources such as phone lists, locations, and planning checklists. These will vary by organization, but technology guides and other information that is essential to know about the company's systems should also be included.

Section Divider

Section dividers are used to physically break down the binder into different sections so that information will be easier to find. After collecting all of the relevant information, organize it and create a table of contents. The table of contents will guide your section division. (We will specifically address the table of contents later.) The sections and topics will vary by organization, but they need to be organized in a clear and concise manner. Use tabbed sheet protectors as section dividers to make it easier to find specific information.

Sheet Protectors

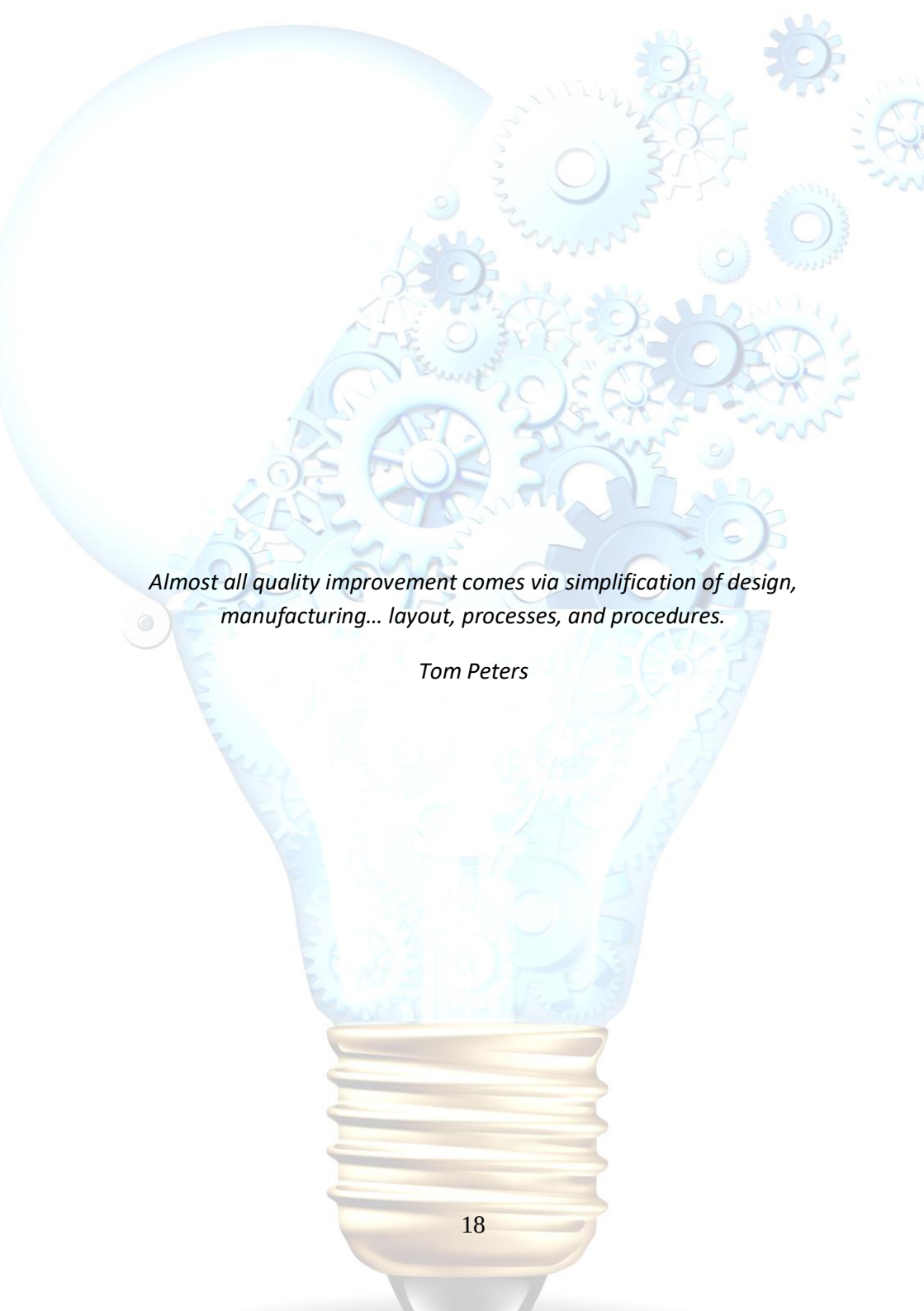
Sheet protectors are necessary to keep the binder safe from accidents and spills. Tabbed sheet protectors should be used for section dividers. Regular, un-tabbed sheet protectors need to be used for the other pages in the binder. Heavy-duty sheet protectors are recommended for pages that will be used frequently such as templates, phone lists, and checklists. It is not necessary to place each page in sheet protectors. Leaving the bulk of pages outside of sheet protectors will make it easier to make changes to the information when necessary.

Cover to Cover Binders

Once you have collected all of the items needed to create a binder, determined what should be included, and organized the information, it is time to place everything in the binder. Choosing the correct binder is important. The information in the binder should be completely enclosed so that it is kept safe. The binders need to be reviewed cover-to-cover to ensure that they are completely enclosed. The size of the binder typically used for this purpose should be one ½ inch to 2 inches wide. It is important to choose a binder that is large enough to add pages to if necessary. Additionally, choosing a binder that is too small can cause the pages to tear and fall out as the binder is used.

Practical Illustration

Aaron was told to create a procedures binder with the tools available to him. He was able to find a 1-inch binder and un-tabbed sheet protectors. As he was putting the binder together, he realized that it was going to be a tight fit. To create section dividers, he placed post-it notes between the sections. As he looked through it, pages fell out and so did the section dividers.



Almost all quality improvement comes via simplification of design, manufacturing… layout, processes, and procedures.

Tom Peters

Chapter Three: Identifying Procedures to Include

When creating an administrative office binder, it is important to choose the procedures that are necessary. If you put too much information in a binder, it becomes difficult to navigate. If, however, you do not put enough information in a binder, it is useless. By keeping track of different tasks, working with other employees, and staying aware of daily activities, you will be able to find the best procedures.

Tracking Tasks for Some Days

In order to identify the procedures you need to include, it is necessary to track tasks for a few days. This should help you identify the following information:

- Determine which operations are executed as part of the position.
- Establish the tools that are used on a regular basis.
- Discover the information that is consulted consistently.
- Determine which events and meetings are repetitive.

Track this information using apps, organizational tools, or write notes. Choose the method that works best for you. Once the information is discovered, it will help narrow down the procedures that you need to include in the binder.

Reach Out to Other Employees for Feedback/Ideas

Determining which procedures to include is not a unilateral decision. It is important to collect feedback from employees and ask them for their ideas about what procedures need to be included in the administrative binder. Take advantage of multiple methods of feedback to ensure that you gather as much information as possible.

Feedback Methods:

- Surveys
- Focus groups
- Meetings
- Questionnaires
- Evaluations
- Suggestion boxes

It is essential to stress that you need to prepare employees before asking them for feedback. Give them time to analyse their own tasks and provide the most relevant information.

Write Down Daily Tasks

We have already established that it is important to note daily, weekly, monthly, and annual tasks. Daily tasks should be recorded for a minimum of five days so that you can determine which tasks you actually complete on a daily basis. The time that it takes for you to complete each task needs to be recorded as well as the task itself. You may write down your tasks at the end of each day or take timed breaks to list your tasks periodically throughout the day. You may also use apps to keep track of your activities. No matter which method you choose, it is important that you complete the record of your daily tasks before you leave the office.

Keep Track Using a Spreadsheet

As you track different tasks to determine which procedures to include in the binder, it is important to keep track of which tasks are daily, weekly, monthly, annually, etc. The best way to do this is with a spreadsheet.

Example:

Tasks	Daily	Weekly	Monthly	Quarterly	Annually
Payroll			X		
Return email	X				

You may need to add times for your tasks. For example, payroll may be bimonthly and meetings can be biweekly.

Practical Illustration

Joan was trying to keep track of her activities, but she was extremely busy. She planned on recording the task as soon as she left the office, but by the time that she returned home, she was not able to recall everything that she did that day. To top it off, she did not have any idea how long any of the tasks took her to complete. She decided to list what she remembered and estimated how long she thought it would take to complete each one. She did this for a few days and used the information to identify her procedures.

Data beats emotion.

Sean Rad

Chapter Four: Top Five Procedures to Record

When creating a binder, it is not possible to address all procedures at the same time. For the best results, it is necessary to limit yourself to five procedures. Begin by choosing the top five procedures that you need to record. Once you identify the top five procedures, using a template and writing detailed procedures will help ensure that the recorded procedures are accurate and effective.

Use a Template to Stay Consistent from Track to Track

Consistency can be difficult to attain when you are moving from track to track. Implementing the use of a template will develop consistency between tracked procedures. There are different templates available, but you can also create your own template and tailor it to the needs of your organization.

What to Include in a template:

- Department: The department that the procedure falls under
- Category: The division that the procedure falls under (Accounting, HR, etc.)
- Job: The job title of the individual who typically performs the procedure
- Purpose: The reason for the procedure's implementation
- Statement: The policy statement outlines the actions and behaviour required using the active voice.
- Regulations: List any laws or regulations to which the policy applies
- Related information: List any guidelines, policies, or procedures related to the new policy.

You may also need to include keywords, definitions, or background information, depending on the scope and complexity of your procedures.

Be as Detailed as Possible

When recording a procedure, you need to be as specific as possible. Provide every detail that you can. Remember that the procedure needs to be recorded so that anyone can complete it without supervision. Write down the steps to your process and review them carefully to determine if you need to clarify steps or add to them.

Do not skip steps to save time or space. On the other hand, avoid using long, wordy instructions that will overwhelm and confuse your readers. The instructions need to be short commands such as “log into the portal at the following website.” An example of an instruction that is too long and wordy would be: “Go to the website and use your password to log into the portal so that you can enter the information you collected."

Use Bullet Points Instead of Paragraphs

The steps that you provide for procedures need to be clear and easy for people to follow. This is where formatting becomes important. Rather than writing the instructions in paragraph format, use bullet points instead.

- Bullet points attract the attention of your readers.
- They are easy to use and provide basic, concise information.
- Bullet points also make it easier for people to keep their place as they are following the steps that you provide.
- Each step should have its own bullet point.

Ask Someone to Execute the Procedure

Before you complete your work recording a procedure, you need to make sure that the procedure is effective. This requires the procedure to be tested. Find a friend or colleague to complete the procedure as you have written it down. It is essential that the person who completes the procedure does so without any direction or interference from you. The written procedure must be able to stand on its own. Once the procedure is executed, ask the individual for feedback.

Questions to ask:

- Were all of the instructions clear?
- Did you feel that any steps were missing?
- Were any of the directions confusing?
- Were you able to complete the procedure?
- What would you change, if anything, about the procedure?

Practical Illustration

Matilda recorded the top 5 procedures and listed the steps out carefully. She reviewed the steps and decided they were effective. She even tested them by following the instructions herself as she completed the tasks. She recorded them, and placed them in the binder. She was surprised the next week when her supervisor told her that she needed to rework some of her procedures because the steps were not clear.

Diligence is the mother of good luck.

Benjamin Franklin

Chapter Five: What to Include in Your Binder (I)

When creating an administrative binder, you must determine what should be included and what should not. The needs of each organization will determine which topics you should include in the binder. There are, however, certain topics that should be included in the binders of most organizations. Commonly used topics include phone etiquette, business writing, arranging meetings, and time management.

Phone Etiquette

Each organization needs to have its own set of guidelines for phone use. The tone of the company will determine the tone used on the phone. There are, however, some basic rules of phone etiquette that most companies can benefit from implementing.

Basic Etiquette:

- Answer by the third ring.
- Have a standard greeting.
- Use hold appropriately.
- Transfer calls efficiently.
- Take messages when necessary.
- Maintain the appropriate tone.

Business Writing

Business writing is an essential skill that each person in your organization needs to grasp. Poor writing reflects badly on the company, implementing a few procedures will reduce mistakes and improve writing skills. Your procedures should be based on the type of writing that your employees must complete. Some basic techniques should be included in the different procedures:

- Use the active voice instead of the passive.
    - We will attend a meeting at 9:00 am on Wednesday. NOT: A meeting will be attended by us at 9:00 am on Wednesday.
- Avoid the overuse of buzzwords and jargon.
- Do not use exclamation points; only use them when appropriate.
- Use short sentences and simple vocabulary.
- Read writing aloud.
- Proofread all written communication.

Effective Time Management

Every organization can benefit from effective time management. When documenting procedures, it is important to include time management strategies.

Strategies:

- Stay organized: Organize the workspace so that you do not waste time looking for things.
- Prioritize tasks: Complete important tasks before the unimportant ones.
- Stop procrastinating: Identify procrastination and avoid it.
- Make a schedule
- Delegate: Give others the responsibilities that do not require your attention.

Binders should include tools with the strategies to help manage time. Tools that binders may include are schedules, time sheets, checklists, and estimated timing per task to help employees keep track of their work and make adjustments as necessary.

Creating Meeting Arrangements

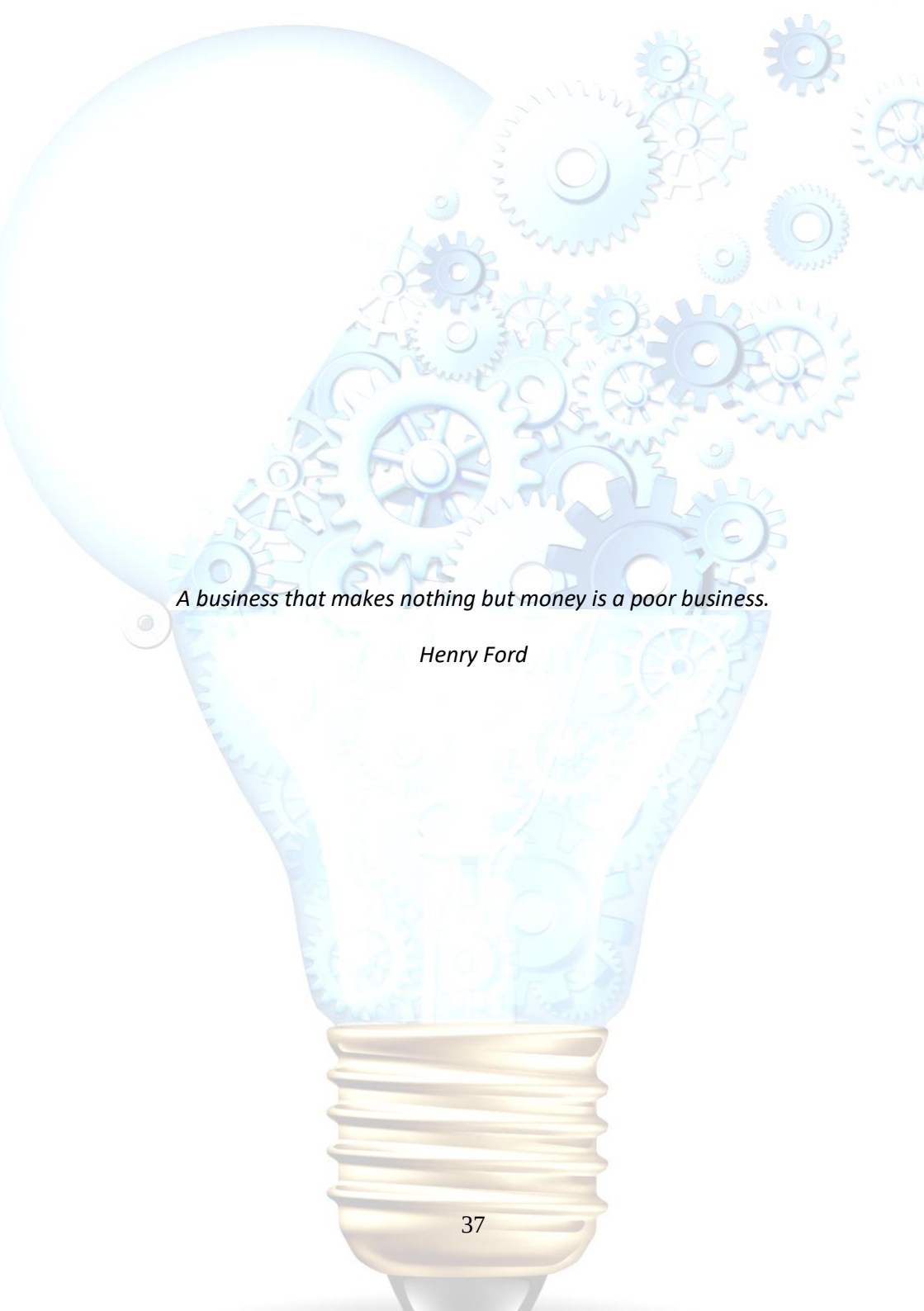
All companies require meetings from time to time. When arranging for meetings, it is easy to overlook something. Providing a checklist to help create meeting arrangements will help ensure that nothing is overlooked, and the meetings go smoothly. The types of meetings you are arranging will determine the checklist. For example, a meeting with members from out of town will require more preparation that a weekly employee meeting.

Tasks to Include in checklists:

- Group size
- Venue
- Notices and follow-ups
- Confirm speakers (when necessary)
- Financial arrangements
- Room arrangements
- Meal planned (if necessary)
- Sleeping arrangements (if necessary)

Practical Illustration

George was responsible for planning the annual company meeting. He kept track of all his communication, suggestions, and requests of other employees. The first day of the meeting, he discovered that three people were not coming. Two of them were supposed to be honoured at a presentation. He had forgotten to follow up with all of the speakers and attendees. George hoped that this was the only thing that he overlooked.



A business that makes nothing but money is a poor business.

Henry Ford

Chapter Six: What to Include in Your Binder (II)

Binders need to include basic policies that employees can easily consult if they have any questions. Policies that most companies should include in binders cover absences, breaks, benefits, and salaries. Make sure that the policies are clearly written, cover general information, and comply with state and federal regulations.

Policy on Absences

Employee absences are costly. In order to prevent unwanted or unscheduled absences, there should be a clear policy. The policy needs to comply with government regulations on every level.

What to include in an absence policy:

- Define different types of absences: PTO, sick days, jury duty, authorized, and unauthorized absences
- Notification requirements and procedures
- Requirements for punctuality: e.g. The number of missed hours that equal an absence
- Emergency absences
- Consequences of unauthorized absences and job abandonment

Breaks

Breaks need to be clearly outlined in the company policies and prominently placed in the binder. Without clear policies, employees might abuse their breaks. On the other hand, you may be violating the law if employees do not take the minimum breaks that are required. Break policy should include lunches and short breaks along with specific times when they should be taken, if applicable.

Be sure to create break policies that comply with the legal requirements. If you have branches in more than one location, it is advisable to make sure that your breaks comply with the strictest requirements. For example, if employees would require 30-minute breaks in one state and 15 minutes in another, give all employees 30 minutes. This provides uniformity in your policies.

Salaries

The policy concerning pay and salary must be outlined clearly in the binder. While it will not disclose the salaries of specific positions, the policy should include some basic information.

- Wage increases based on performance
- Cost of living increases (Yes or No)
- The use of timesheets, timecards, etc.
- Overtime requirements/exempt and non-exempt employees
- Pay schedules

Benefits

Employee benefits can be confusing. Explaining the policies that govern employee benefits in the binder will allow employees to answer their own questions and prevent misunderstandings. It should be noted that employee benefits might overlap with employee absences. You must clearly state what makes employees eligible for specific benefits.

Benefits to Address:

- Group insurance
- Cobra benefits
- Retirement (e.g. 401Ks)
- Holidays
- Leave
- Educational assistance
- Development and Training

Practical Illustration

Hank disliked taking breaks. He would only stop long enough to eat his lunch and then begin working again. His supervisor encouraged other employees to emulate Hank's commitment to the job. One of them reported the manager's actions to HR, and Hank was soon notified that he had to take his complete lunch break each day, and his supervisor was written up for discouraging employees from taking their full breaks.

The secret of all victory lies in the organization of the non-obvious.

Marcus Aurelius

Chapter Seven: Organizing Your Binder

Once the policies and procedures are completed, it is time to place them in the binder. Organization of a binder is similar to any other document. You must provide a table of contents that lists each section and a list of procedures that each section covers. Once the binder is put together, you need to keep it up to date and make changes as necessary.

Create a Table of Contents

This means the first step that you must take is to gather procedures you developed and organize them into broad sections of information, which we will discuss later. The sections that you have will be listed in the table of contents. Each of the sections will correspond with the tabbed dividers that you use in the physical organization of the binder. A popular option is to use numbered tabs that correspond with the numbers used in the table of contents, similar to the page numbers used in books. Using numbered tabs rather than named tabs make it easier to reorganize the binder when necessary.

List Each Section (e.g. Accounting)

Before organizing the binder, it is essential that you list out all of the sections. The focus of the company will determine what sections you need in your binder, but there are a few common sections that many companies share.

Commonly Used Sections:

- Accounting
- HR
- Contacts
- Daily, weekly, and monthly checklists
- Events
- IT
- Calendar

The examples used are not comprehensive, but they provide a useful starting point to help guide you in creating your own binder sections.

List Procedures in that Section

As we already stated, every procedure will fall under a specific section. After you have developed the list of sections, you need to organize the procedures below them. Review the list of procedures to make sure that they are with the correct sections. The tabbed sheet protectors that divide the sections should have the section as the heading, and the procedures should be bulleted below the section. Make sure that the bullets are in the order of their appearance. This makes specific procedures easier to find.

Example:

Accounting

- Expense reports
- Profit and loss
- Payment processing

Keep Binder Updated with any New Changes

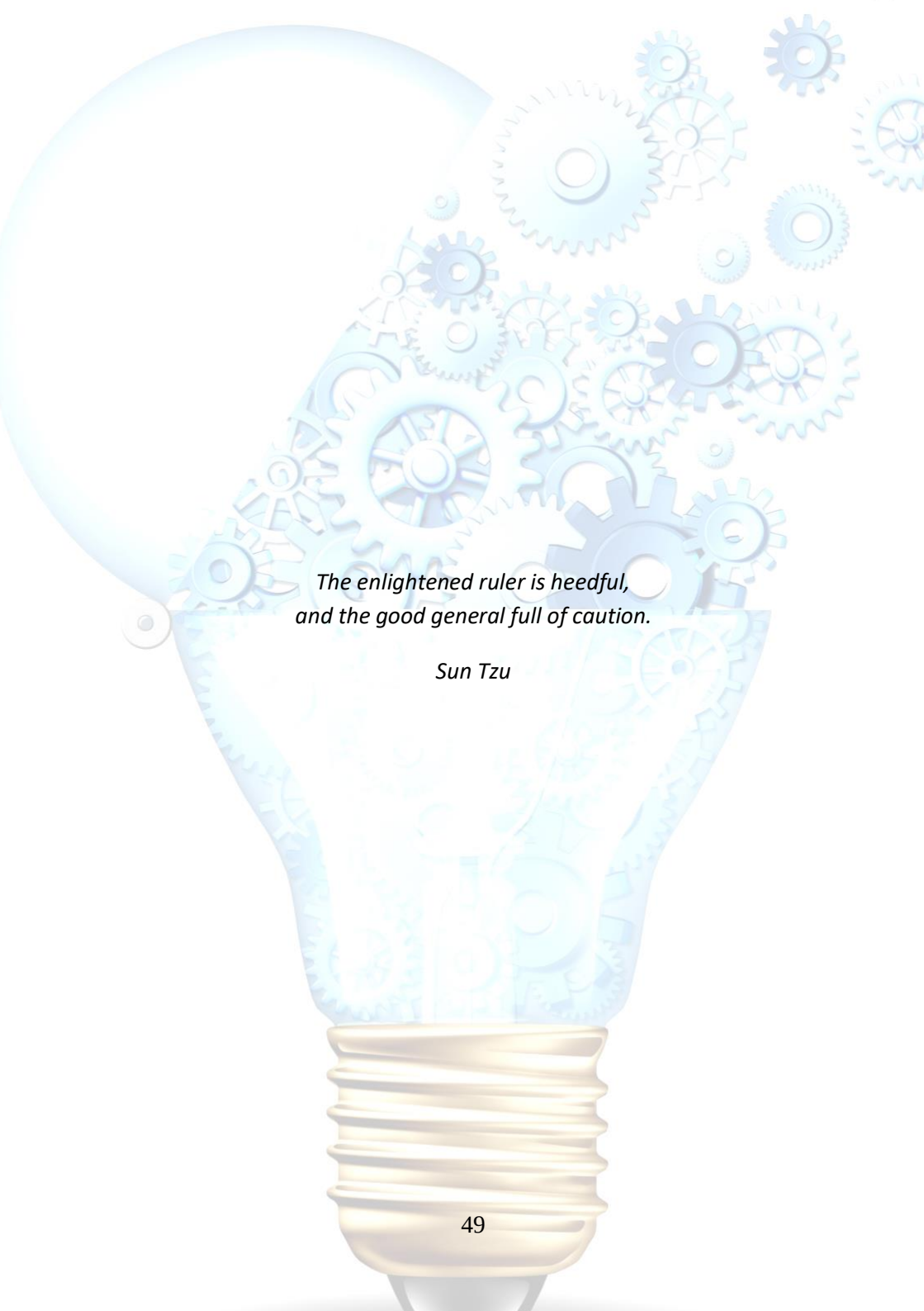
Policies and procedures will inevitably change over time. It is important that you update the binder as needed. There are several steps that you can take to keep the binder up to date:

- Mark the printed pages when you notice that the information is inaccurate.
- Leave the binder document in a folder that has a shortcut access on the computer.
- Make the changes to the file and print it immediately.
- Make the files easy to share with others responsible for it so that the information in the binder remains current.

By reviewing the binder on a regular basis, you will be able to ensure that the information being share is accurate and up-to-date.

Practical Illustration

Tim created and organized the binder for his team, and he encouraged everyone to use it. Soon, it became the main source of information. After a few months, the policies on benefits changed. Tim made a mental note to make the changes in the binder, but he became busy with another project and forgot about it. A month later, a colleague used the binder to help schedule his vacation, and he was surprised when he learned that his request was denied because there was a holiday blackout.



The enlightened ruler is heedful,
and the good general full of caution.

Sun Tzu

Chapter Eight: What Not to Include in the Procedure Guide

We have already established what to include in the procedure guide. Now it is time to address what should never be included in a binder under any circumstances. Much of what needs to be avoided in the procedure guide is common sense. Passwords and any other confidential information must not be included on the binder. Find other methods of sharing confidential information when it is necessary.

Passwords

Passwords should never be placed in the binders where they can be easily read. This includes all passwords that may be used regularly such as email, company portals, passwords to financial accounts, etc. If passwords need to be recorded, they should be stored in a separate folder. Physical folders with passwords should be kept in a separate location from the binder, and any computer files need to be password protected themselves.

Only authorized personnel should be able to access the passwords. Determine who needs to access passwords and make sure that they know how to access the information. This list typically includes administrators and people in executive positions.

Identify Other Confidential Information Via Your Employer

Companies are responsible for a great deal of confidential information, and they have an obligation to keep this information safe. This includes social security numbers, dates of birth, company credit card information, trade secrets etc. Like passwords, all confidential information needs to be kept out of the all binders and manuals. Remember, if you have any concern that information you have may be private, do not record it for all to see. It is better to be safe than sorry.

Store Information in a Separate Folder Outside of the Guide

When you must store confidential information, place it in a separate folder. The folder should be labelled carefully. Obviously, writing confidential information on the folder is not an option. It is best to give it a simple label such as Administrative Information, or simply give it the same name as the executive's title. Choosing an innocuous title will help disguise what you are storing and prevent people from becoming too interested in the folder when you need take it out.

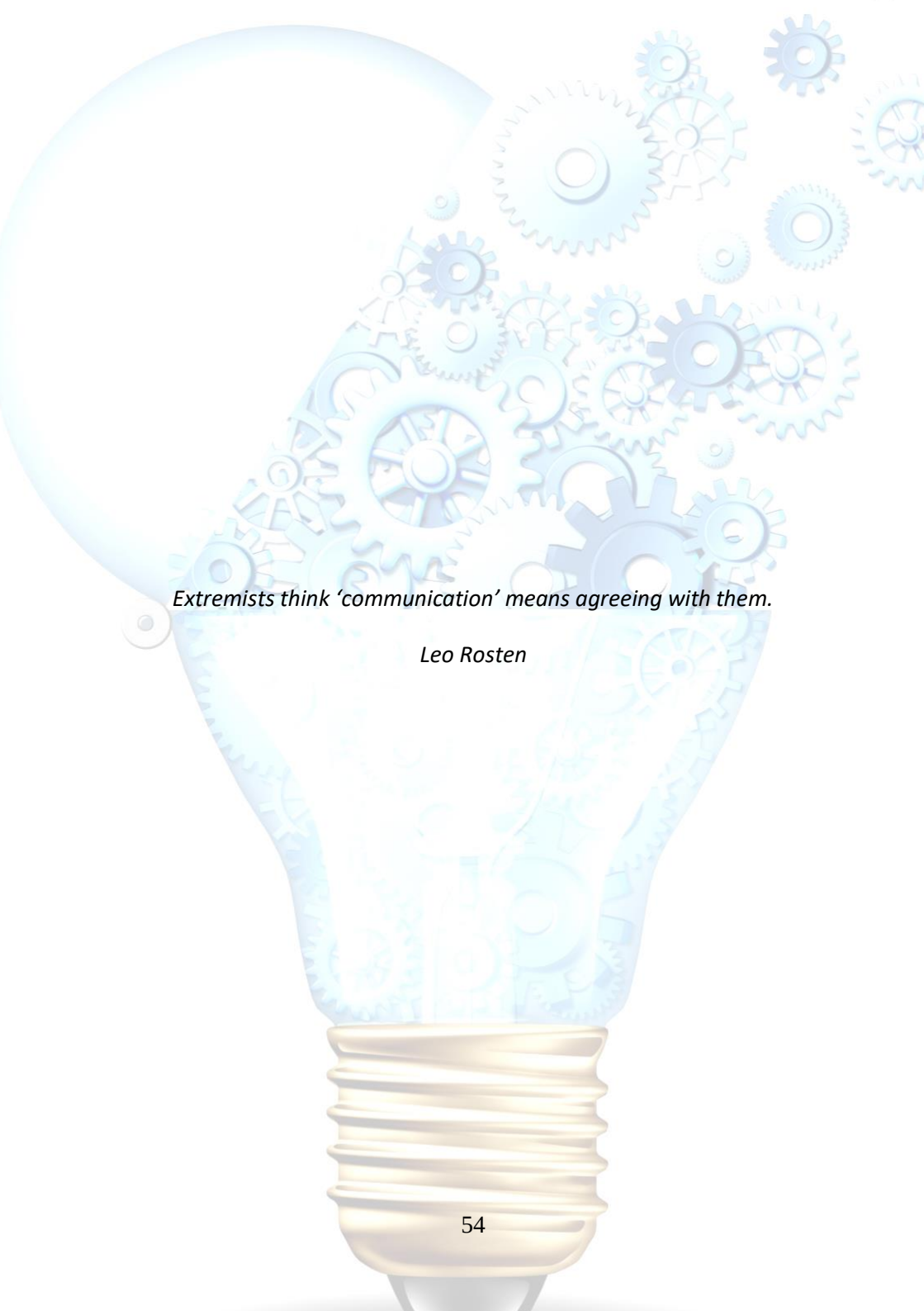
Find a Secure Location to Store

Once confidential information is placed in a separate folder, it needs to be stored securely. Lock it in a drawer or file cabinet that other people are not able to easily access. Place the folder in the back of the drawer or cabinet. Only tell authorized personnel where the folder is located, and do not leave the key out where it can be found.

Any computer files that contain confidential information need to be password protected and encrypted. You should avoid storing the files on shared systems. The more difficult that it is to access information the better. Additionally, make sure malware detectors, firewalls, and other security features are updated regularly.

Practical Illustration

Diana was asked to keep confidential information for her supervisor. She decided to keep the folder in her file cabinet. Her supervisor labelled the folder account numbers, so anyone who looked at the folder would know that it contained confidential information. Diana kept the cabinet locked, but she did not want to keep the key on her in case her supervisor wanted to get the file while she was gone. She left the key below the pens in her desk drawer. Eight months later, the supervisor noticed money missing from the account.



Extremists think 'communication' means agreeing with them.

Leo Rosten

Chapter Nine: Share Office Procedure Guide

Once you have completed the binder, you must share it with the rest of the office. At this point, communication is essential. Without the buy-in of key stakeholders, the procedure guide will not be a tool that gets much use. Getting feedback from executives and employees alike will ensure that your guide is effective and applicable to the needs of your audience.

Give Guide to Boss/Executive to Review

The procedure guide needs to be reviewed by your boss or the executive in charge of your department before it is implemented. Superiors will be able to identify any gaps in information that need to be filled. Review any notes that your boss makes, and add the changes before returning the guide to the supervisor. Complete this process as many times as necessary until you are both satisfied with the result. After the guide has been reviewed, it is time to inform other members of the personnel.

Inform Office Personnel of Procedure Guide

The guide should be an essential tool used by the office personnel. You need to introduce the guide to everyone it can benefit. This requires more than a quick announcement in a meeting. There are different ways to introduce the procedure guide, and you may use more than one.

Methods of introduction:

- Email announcement
- Meeting
- Presentations
- One-on-ones

Regardless of the method of communication that you choose, make sure to tailor the communication to meet the needs of your audience.

Place Guide in a Visible Area

Once the guide is introduced, you must display it carefully. The guide needs to be placed in an area that is visible to all employees who will use it. The setting of the workplace will determine the best location for the placement of your guide. If there is a common area for materials, place the guide in a prominent location in the area. You may also display it on your desk with the understanding that people may use it. Regardless of which location you choose, it is important that the guide be easily accessible.

Allow Office Personnel to Express Improvements/Updates if Needed

Never underestimate the importance of feedback. The people who use the guide are the best ones to listen to when it comes to making improvements and updating the information. Do not simply wait for people to share their views. Provide employees with different opportunities to communicate with you.

For example:

- Discuss the binder at weekly meetings.
- Provide surveys.
- Bring it up in one-on-ones.

Depending on the organization of the company, you may choose to allow employees to update the binder on their own.

Practical Illustration

Brad completed the binder and reviewed it with his boss before displaying it in the break room. He expected to be inundated with questions and comments, but no one seemed to notice the new procedures manual. He brought it up in a meeting and discovered that most of his peers had no idea that the binder even existed.

Success comes from taking the initiative and following up…

Anthony Robbins

Chapter Ten: Successfully Executing the Guide

The guide must be executed with the same diligence that was used to create it. This requires training, consistency, and communication. Your guide must evolve with the company, so remember to consider new ideas while creating a culture of consistency.

Create a One Hour Meeting/Seminar for Employees

After the guide has been introduced, it is important that employees are trained in how to use it. Extensive training is not necessary. A one-hour meeting or seminar should be sufficient to explain the guide. There are a few steps that you can take for the meeting:

1. Establish the outcomes that you expect.
2. Develop an agenda
3. Train the employees

The agenda needs to include:

- The topics addressed
- Objective
- Outline (with time limits to topic)

Adhere to the agenda once the meeting begins to ensure that the meeting stays on course.

Stay Consistent with Procedures

Once procedures have been implemented, it is important that they are consistently followed. There are different tools such as checklists to ensure that the procedures are followed. The most important factor in creating consistency, however, is leading by example. If the leaders and people who created the policies and procedures do not abide by them, then there is little motivation for the other employees to do so. Be sure to address inconsistencies as they occur. Do not wait to address problems until meetings or reviews.

Make Employees Aware of any Updated Changes

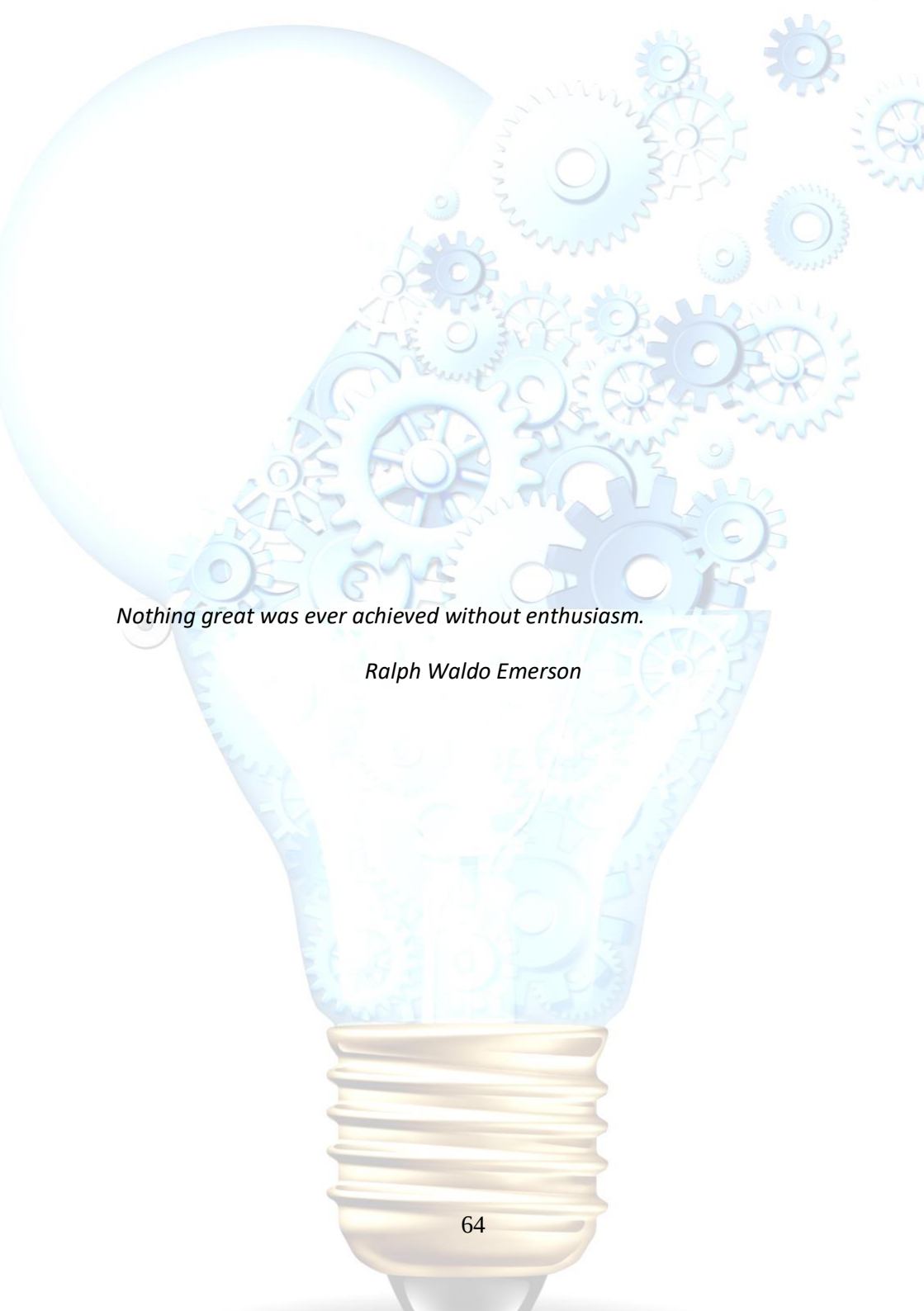
Policies and procedures will inevitably change over time, which is why communication is so important. You cannot simply assume that employees periodically read the binder to keep up with changes. You must communicate the changes directly to them using formal and informal methods. Formal methods used to communicate change include: email, meetings, and conference calls. Informal methods of communication include: lunch, events, and casual conversations. Be sure to use multiple methods of communication to reach as many employees as possible.

Keep Open to Improvements

It is essential that you do not become so attached to the binder you create that you stop looking for ways to improve it. This is also true in every area of life. You need to be open to new ideas, and you must maintain a dialogue with other people to hear them. You should go beyond simply using traditional feedback methods to discover ideas. New ideas can be found anywhere; you may hear something in a casual conversation, read something in a book, or hear something on the radio. By always being open to improvements, you will be able to keep the binder relevant and effective.

Practical Illustration

Warren was instructed to implement the new policies and procedures outlined in the binder. Warren introduced the procedures to his employees and kept the binder in a visible location. The policies and procedures soon slipped his mind, and he fell back into old habits at work. Employees decided that the new policies and procedures were not important when they realized that Warren did not follow them himself. Soon, almost everyone chose to work without regard for the procedures outlined.



Nothing great was ever achieved without enthusiasm.

Ralph Waldo Emerson

Closing Thoughts

- **Seth Godin:** There’s no shortage of remarkable ideas, what’s missing is the will to execute them.
- **Charles Darwin:** It is not the strongest of the species that survive, nor the most intelligent, but the one most responsive to change.
- **Thomas A. Edison:** Just because something doesn't do what you planned it to do doesn't mean it's useless.
- **Jack Welch:** Willingness to change is a strength, even if it means plunging part of the company into total confusion for a while.