

OFFICE ADMINISTRATION (DES 1204)

LECTURE : 1

TOPIC : Planning, organising and monitoring of work.

AIM : To develop the skills of effective time allocation, self-organisation, identifying people who waste time and interrupt workflow, and considerations when delegating and allocating work.

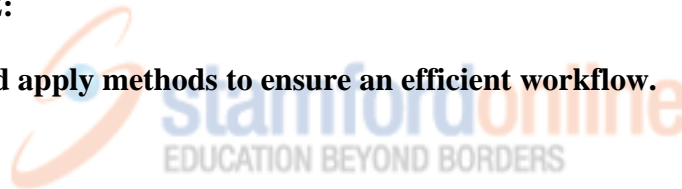
LEARNING OUTCOMES:

After completing this topic you should be able to understand:

- 1) The various methods used to plan, organize and monitor workflow.**

TOPIC OUTLINE:

- 1.1 Identify and apply methods to ensure an efficient workflow.**



1.1 Identify and apply methods to ensure an efficient workflow

- **Identifying your role in the workplace**

It is important for you to identify your specific role in your organization and to demonstrate your keenness to develop it to the fullest extent. By doing this both you and your employer benefit in the following ways:

- you establish your unique place within the organization
- you are seen to be taking positive steps to fulfil your potential
- you gain greater job satisfaction and interest from taking an active part in your own personal development
- you are laying the foundations for your career development and promotion
- you are helping the organizations to be successful in achieving its objectives

Work planning and scheduling

Careful planning of office procedures and tasks is essential to ensure that deadlines are met, the workload is spread and controlled, and priorities are established.

Planning guidelines

Begin by preparing a checklist of all the activities involved in a task and arrange them in the order in which they should be carried out, noting especially any deadlines for completing parts of a task as well as the date when the total task should be completed.

Forward planning is essential: plan well ahead to allow adequate time for each stage of the work schedule. Reminders of work to be done at different stages can be entered in an office diary.

Plan each day's work and assess your priorities as follows:

- urgent – top priority – must be done today
- not so urgent but important – so try to do it today
- not urgent and less important – low priority – could wait for another day if time does not permit for it to be done today.

Prioritise unexpected tasks according to the needs of the organization.

Report any anticipated difficulties in meeting deadlines to the appropriate person.

Make use of planning aids such as diaries, computerized desk diary planners, year planner charts, follow-up systems, control boards, etc.

Desk Diaries

The desk diary is the focal point and linchpin when it comes to organizing an office. It is both the reference for the day's activities and the basis for all forward planning. Therefore, sound diary management is an essential element of any secretary's role.

A desk diary can be used as a reminder of:

- work guidelines
- appointments and meetings
- files to be followed up
- staff absences – holidays, etc
- social engagements

Key factors in using the desk diary

Be systematic –

At the beginning of the day refer to the diary and take the necessary action on all entries, e.g. prepare the papers and files for appointments, meetings and correspondence (follow-up).

During the course of the day keep in mind and prepare for the various activities – make amendments, additions and deletions to the diary as required.

At the end of the day ensure that all items have been dealt with or, if necessary, transferred to a future date.

Write entries clearly and concisely with a pen including essential details of appointments, time and place.

Enter provisional appointments in pencil and ink them in when they are confirmed.

Appointments for each day should be entered in the correct time sequence.

Do not overload the diary – cross reference to a file or follow-up system where necessary.

Provide all essential details, e.g. precise meeting places and exact appointment times.

Give thought to the overall programme for the day and week.

Allow for thinking and / or travelling time.

Computerized desk diary planner

A desk diary can be kept on a computer so that the entries can be seen on a VDU and a printout made when required. An entry is made by keying in the date, time and brief details of the appointments, and if it has to be cancelled or changed to another time or date it can be removed from the ‘memory’ and re-entered on another date or time, as necessary.

The computer can be programmed to reject any entries at certain times of the day or even whole days when appointments cannot be held. An appointment which occurs several times during the year at regular intervals can be entered once with the relevant dates and it is automatically entered on each of the dates. Each day’s entries can be viewed at the beginning of the day and, for planning purposes, it is possible to view a month’s entries. All forthcoming events, reminders and ‘unavailable days’ can be displayed up to a maximum of 30 days.

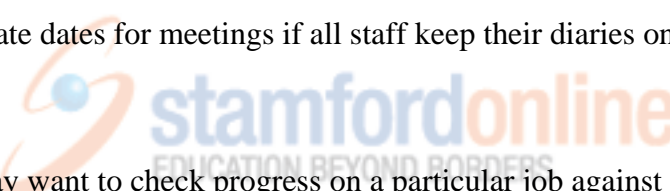
Uses

It is particularly good for following up correspondence and for reminders of work to be done on particular dates, such as the preparation of an agenda for a meeting.

Co-ordinate dates for meetings if all staff keep their diaries on the computer.

Gantt Charts

You or your boss may want to check progress on a particular job against your planned timings for it. One way of recording actual performance against plans is to produce a Gantt chart. The top line of the chart records the planned progress over a time-scale, so that you can see at a glance whether you are on schedule or falling behind. See Fig. 1.1.



		M	T	W	T	F	M	T	W	T	F	M	T	W	T	F
Project A	Plan															
	Actual Time															
Project B	Plan															
	Actual Time															

Fig. 1.1 shows the planned progress and actual performance of two projects.

Plastic Year Planners

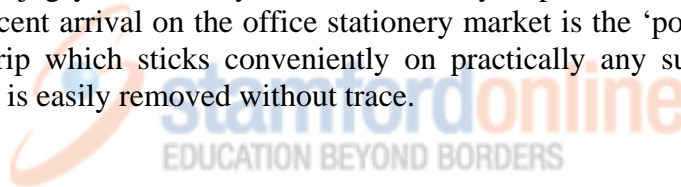
These are large plastic calendars with spaces for every day of the year on which information can be written with wipe-off pens. They can be used for planning appointments, meetings, holidays, etc. You can see at a glance a year's activities and plan future events methodically on one single sheet.

Planning Control Boards

Project planning, progress of work and trends can be monitored and easily controlled by visual planning boards. These boards are designed to provide quick and easy reference to all sorts of information. They can be set up for virtually any purpose, e.g. to plot sales progress, to identify different staff holiday periods, to highlight important dates and deadlines. It is easy to read and quick to update showing changes as they occur.

Making Lists

Aide memoires can simply take the form of lists, and often a name or subject heading will be sufficient to jog your memory and ensure that you pass the information on. A useful, relatively recent arrival on the office stationery market is the 'post-it' note which has an adhesive strip which sticks conveniently on practically any surface, including other paper, and yet is easily removed without trace.



Follow-up Systems

A follow-up system is used to ensure that a matter is not overlooked, especially when action is required following the writing of a letter. If, for example, a letter is written on the 7th of the month, the writer may wish to send a further letter on the 17th if a reply has not been received. When the writer signs the letter on the 7th he or she completes a memo form, attaches it to the copy of the letter in question, enters on it the date when the file is next wanted, and places it in the filing tray.

The filing clerk fills in the name of the correspondent and, if necessary, the subject matter, and detaches the form, which is filed in the appropriate pocket of the follow-up cabinet. The letter itself is then filed away in the proper file with other correspondence, where it can be found at any time it is required.

The follow-up filing cabinet drawer contains twelve pockets, entitled January to December. Memos are placed in the appropriate monthly pocket which, when the month becomes current, is sub-divided on a daily basis by daily insert sheets. If the quantity of paper requires it, the system may have a separate pocket for each day of the month.

Each day the filing clerk extracts any memo forms from the current daily pockets, finds the files to which they refer and passes them to the individuals whose initials appear on the forms. After appropriate action, the writer places the form and files back in the filing tray with, if necessary, a further date marked in for follow-up, and the whole process is repeated.

The Pending File

Work not yet completed, or which needs to be referred to within a short time, is placed in a 'pending file' which is referred to daily. All letters which require action on that day are extracted, dealt with and finally filed away in the proper file or brought forward at a later date. Apart from its simplicity, an advantage is that all unfinished work is kept in one folder; a disadvantage is that the whole contents of the folder have to be looked through to find those letters requiring action on a specified day, and that the subject file does not contain all the relevant papers unless a duplicate copy is taken and placed in it.

Time Management

Time is something none of us ever has enough of and consequently the way in which we manage our time is important if we want to be effective in achieving the things we set out to do. In a secretary's day a lot of her decisions in terms of how she manages her time will involve her in prioritizing and this ability to prioritize is something on which bosses set high store. Sometimes it will be a physical impossibility to get through everything that is in an in-tray in the course of a day, given the many interventions which typically occur. What is important is that essential things are completed. Things will invariably fall into four principal categories:

- 1 Things that *must be done*.
- 2 Things that *should be done*.
- 3 Things that *could be postponed*.
- 4 Things that *can be delegated*.

Therefore it will be a matter of checking through the workload and assessing priorities. Categorising according to the four types mentioned above should help you make the right decisions.

Know yourself

Do any of the following describe you?

- You do interesting things before uninteresting things?
- You do things that are easy before doing things that are difficult?
- You do things that are urgent before things that are important/

You work on things in the order of their arrival?

You wait until a dateline approaches before really moving on project

If you answered yes to one or more of these questions, you could benefit from time management.

Typical thieves of a secretary's time

One thing that will enable a secretary to manage her time more effectively is her ability to pinpoint typical things which will eat into time in the course of the day's work. These include:

- failing to listen carefully to instructions first time round and having to ask again later;
- not setting any time aside to liaise with the boss;
- unnecessary interruptions;
- lack of planning;
- setting unrealistic targets;
- trying to tackle far too many things at once and ending up with nothing completely finished;
- doing things that could easily be delegated to someone else purely out of habit or just because you like doing them;
- lacking confidence to do the task straight off, i.e. making drafts of routine things;
- not getting straight before tackling a task, e.g. starting a job in the certain knowledge that you should make a phone call first or not taking a few minutes to tidy your desk before settling to a task;
- not having essential reference materials to hand, e.g. dictionaries, timetables, telephone directories;
- reading slowly;
- trying to short-circuit something, e.g. failing to consult an instruction manual when using an unfamiliar piece of equipment or attempting a new function on a familiar machine.
- careless proofreading;
- making unnecessary checks;
- looking for things which haven't been put back in their rightful place;
- retracing one's steps, e.g. going backwards and forwards to the files or photocopier;
- ploughing through mountains of unfilled material;
- hoarding, e.g. failing to discard unwanted papers, and then being constrained for space;
- frittering time away on personal activities, e.g. office gossip, personal phone calls, reading newspapers;
- indecision;
- lack of assertiveness;
- untidiness.

Tips on better time management/Ways to manage time more effectively:

Set yourself targets.
Set aside some time every day for planning.
Keep checklists.
Make a 'things to do today' list.
Note the *priority* items and attend to them first.
Keep frequently consulted materials at hand, e.g. telephone numbers.
Keep wall charts and visual control boards up-to-date.
File everyday.
Discard unwanted paper – do not hoard.
Keep drawers tidy and label containers.
Put things away when you have finished with them.
Set aside regular times each day for certain tasks – develop a routine.
Group tasks together, e.g. try to do all photocopying together.
See every task through – do not leave things half done.
Break up a large task into manageable units.
Be systematic and tidy – do not crumble under pressure.
If you are busy, learn to say 'no' pleasantly but assertively.
Improve your reading speed and accuracy.
Be confident – avoid checking and rechecking (better proofreading can save time in the long run!)
Take your time – do not panic – stop to think. Remember that correcting errors is time consuming!

Delegation

With changes in the secretarial role and often an increasing emphasis on the administrative and organizational aspects of the management support provided, many secretaries found themselves in the position of having to delegate work to junior members of staff.

Effective delegation is a key factor in making organizations work and yet delegating effectively can present problems for personnel at levels. Delegation does not simply mean passing the responsibility for an aspect of work to someone else in a junior or subordinate position. That is only part of it. As well as the responsibility for the duty or task the junior must have the authority to match that responsibility and yet the delegator must be the person who is ultimately accountable for the success or failure of the work.

Not all tasks can be delegated and it is important to select things which are appropriate and which fall within the capabilities of junior staff. The sorts of questions a secretary needs to ask when considering what to delegate are:

What minor tasks do I perform frequently?
What things keep coming up in my job again and again?

What things are junior staff as well equipped, or perhaps even better equipped, to deal with than I?

Which tasks do I enjoy doing just because I've always done them?

Which of my tasks would provide variety, challenge and experience in a junior's workload?

Which of my tasks are directly related to something a junior does already?

What kind of experience would be useful to a junior in developing new skills and abilities?

Which tasks can be delegated which can be clearly explained and will require minimal control and supervision?

By posing such questions certain tasks should appear obvious candidates for delegation while others will clearly need to be retained.

Delegation should achieve two principal objectives, namely:

it should ease the secretary's workload so allowing more time to be spent supporting the manager and;

it should help develop junior staff by affording them new challenges and giving them opportunities to turn their hands to other things.

Consequently, where the above two are achieved, delegation:

improves efficiency and performance of the department as a whole and; will also help ensure a succession of suitably qualified staff when the secretary is promoted.

A secretary's procedure for delegating to juniors

Where a secretary is in a position to delegate some of her duties to junior staff it is useful for her to follow a procedure which will help isolate appropriate things for delegation, enable her identify suitable staff and ensure that the tasks are adequately monitored. The following are possible steps for such a procedure:

examine own job;

list ALL tasks undertaken currently;

add any tasks currently omitted through lack of time;

extract tasks which cannot/should not be delegated;

rearrange remaining tasks in descending order of importance;

allocate an approximate time to each task;

work down the list till the point is reached at which there are sufficient tasks to cope with in the time allowed;

draw a line across the list at this point – all tasks below the line are possibilities for delegation;

examine strengths and weaknesses of juniors;

match the tasks to be delegated to the most appropriate junior taking account of current workload and work content;
fully brief junior on the task to be delegated;
make sure that instructions are fully understood;
inform junior of the support that will be given;
indicate the amount of feedback expected;
delegate the necessary authority;
inform others who need to know about the delegation;
check progress periodically;
do not anticipate trouble, but keep a watchful eye for it.

Organisation of the Workplace

Office Planning and Layout

Whoever is responsible for the planning and layout of the office must aim to secure maximum efficiency combined with economy. In order to achieve the objectives, attention must be directed to:

the location of the office
floor space and layout
staff required
duties of the staff
office equipment



Location of the office

The site must be carefully chosen, having regard to the need to maintain easy contact with branches, works, etc. Reasonably close proximity to the Post Office, Banks, and other services is also important.

The cost and the running costs of the office may be vital factors. It might, however, be false economy to choose an office in a poor locality. Equally, of course, the office chosen ought to allow for future expansion of the business, bearing in mind that it is usually possible to sub-let a floor or rooms not immediately required.

Floor space and layout

The placing of rooms and departments must be a primary consideration, where, for example, certain departments must be arranged in such a way that the documents they handle flow naturally.

Services and service departments, etc., such as the following, may require special planning:

- i) waiting rooms
- ii) board room, conference rooms, private rooms of directors and chief executives
- iii) typing pool(s)
- iv) filing department
- v) canteen(s)
- vi) sound-proof room(s) for office machinery
- vii) public rooms
- viii) cloakroom(s)

Allocation of space to the various departments, services, etc., must take into account current legal requirements and the number of staff to be accommodated in each case. The calculation of departmental area requirements can be facilitated by the use of an organization chart, which, it is suggested, should be prepared at this stage.

Floor plan(s)

Having decided upon the placing of the various departments, services etc., and the area to be allocated to each of them, the next step is to prepare a plan for each floor, using squared paper and templates, cut to scale, to represent furniture and other equipment.

Prior to the preparation of a floor plan, various decisions must be taken and alternative possibilities considered, for example:

- i) *Open plan or partitioned?*

Here the choice is between the “open-plan” office without partitions and permitting greater opportunity for supervision, and the use of partitioning to break down the same area into smaller offices.

- ii) *Functional or systematic?*

Another choice lies between a functional arrangement, based upon the natural divisions of the work undertaken, and a systematic one, where the layout is planned to fit in with the documentary flow.

Important factors need to be considered. Having made a decision as to which form of layout is to be adopted, consideration must be given to the following:

- i) *Legal requirements* The requirements of the Offices, Shops and Railways Premises Act, 1963, must be observed e.g. as regards space, ventilation, sanitation, lighting, temperature, etc.

- ii) *Workflow* As far as possible, the arrangement of departments must provide for continuous flow of documents, and of the work, in one direction.
- iii) *Minimise movement* The aim must be to reduce movements to a minimum in order to save time, reduce noise and distractions and increase overall efficiency. The placement of desks and telephones, and the use of document conveyers ought to be considered in this connection.
- iv) *Noise reduction* In order to promote efficiency, noise must be reduced to a minimum. The reduction of movement will help direction. If noise cannot be reduced, the alternative is to keep the source of the noise apart from employees whose work is likely to suffer, e.g. noisy machines might be kept in a sound-proof room, and rooms accessible to the public must be carefully sited.
- v) *Placing of desks* An orderly arrangement of desks and other equipment is important. Placing and spacing require careful planning to ensure passageways are wide enough and free of obstruction; moreover, account should be taken of the situation of desks, filing cabinets and other equipment in relation to windows, artificial lighting and heating equipment.
- vi) *Flexibility* The layout must be planned with great care and deliberation; nevertheless, the planners must aim at flexibility, so that any changes necessitated by expansion or other cause can be met without creating an uproar.
- vii) *Communication* Provision must be made for easy and direct communication. Although verbal communication ought to be used wherever possible, provision must also be made for the use of an internal telephone system, document conveyers, and internal memorandum forms. Consideration might also be given to the installation of a teleprinter, which provides a system of both internal and external communication.
- viii) *Supervision* Whatever the arrangement planned, it must provide facilities for ample supervision on each floor and within each section of department on each floor.
- ix) *Lighting* Whether natural or artificial, it must be adequate and, in the case of artificial lighting, well spaced. In this connection, the height of cupboards and any other tall equipment must be considered so as to ensure that they do not throw shadows on to the employee's desks.
- x) *Partitioning* If partitioning is preferred to the open-plan type of office, special care must be taken to ensure that supervision will not suffer.
- xi) *Furniture and equipment* Warrant special consideration and deserve great care in their selection. It is suggested that the opportunities might be taken in this

connection to apply the science of ergonomics to the office – that is, by equipping it with ‘functional’ furniture designed for the most effective accomplishment of the job it is intended for.

TUTORIAL QUESTIONS

1. Identify the types of planning aids which a secretary might use in planning and scheduling her work. What sort of things make for a secretary’s poor management of time.
2. Suggest ways to manage time more effectively.
3. Define delegations and its objectives.
4. What kind of tasks can a secretary delegate to a junior?
5. Outline a procedure for delegation.
6. Identify the factors which need to be taken into consideration when planning the layout of an office.

