

BECOME A PROCEDURES The Admin's Guide to Developing

Effective Office Systems and Procedures

JULIE PERRINE

Author of The Innovative Admin and The Organized Admin

PROCEDURES PRO

The Admin's Guide to Developing Effective Office Systems and Procedures

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Dedication

This book is dedicated to all of the organized, innovative administrative professionals who put the effort and time into creating effective systems and procedures to keep their offices running smoothly!





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Foreword

It started with a tweet. We had recently relaunched Executive Secretary Magazine, and I was on the lookout for new authors. From the moment I saw Julie Perrine's tweet inviting administrative professionals to create their administrative procedures manual, I just knew. Here was our Procedures Queen. Julie has written for us ever since.

She began as an admin herself, and as she is fond of explaining when she speaks at conferences, she thinks she emerged from the womb organized. There is a particular slide that springs to mind, featuring a picture of Julie, age 2, already sitting next to the phone holding a three-ring binder.

Thinking her ability to create procedures was just something that every assistant does as standard, Julie was astonished to find that her administrative procedures binder template quickly became the stuff of legend – first within her own business and then via AllThingsAdmin.com. An unlikely superstar, Julie built her following and then an international business on how to instigate logical procedures and systems.

In this, her third book, Julie looks at both procedures and systems, explains the difference and the importance of both, and shows you how to implement them quickly and with minimal stress. Like Julie herself, the language is no-nonsense, to the point, and completely reliable. This is the book that you need to simplify the way your office runs whether you are present or not.

Julie brings order to everything she touches. Calm, efficient, and productivity-driven, her exceptional, but methodical, systems-driven brilliance has been adopted by assistants worldwide. She has literally changed lives by bringing order to chaos. Her systems, procedures, and productivity tools have added thousands of hours to the bottom line of corporate business across the world.

Executive Secretary Magazine is proud to have played a part in bringing Julie's techniques to a global audience both in person and virtually.

On behalf of the administrative profession and the millions of businesses that assistants serve, long may she continue.

Lucy Brazier

CEO, Marcham Publishing Publisher of Executive Secretary Magazine International Speaker, Conference Chair, Expert on the Administrative Sector ExecutiveSecretary.com



Introduction

"My philosophy is that not only are you responsible for your life, but doing the best at this moment puts you in the best place for the next moment."

- Oprah Winfrey

procedures aren't just a project to tackle when you have some extra time. They are vital to an effective and efficient office. I know this firsthand.

I've held several administrative positions throughout my career, and not a single one had documented procedures when I started. So I made it my goal to create them as I was trained. This was an essential task, as procedures helped me deliver consistent work during my time at each job. I never left a company without leaving a binder full of procedures for my successors.

Fast-forward several years to January 2005 when I launched my virtual assistant business. Every small to mid-size company I took on as a client needed procedures. I helped entrepreneurs and established companies alike document and implement their procedures. In the summer of 2007, I began blogging about how to create procedures, and I realized a lot of people needed help with them. So I started creating templates, training, and tools to make the process easier.

However, it wasn't until January 2011 that procedures became very personal for me.

I was sitting at my kitchen table eating breakfast with my husband when my cell phone rang. The caller ID said it was my mom, but the voice on the other end was someone else's.

My mother had arrived at work early that day and slipped on the ice. Her coworkers found her in the parking lot when they arrived 30 minutes later. She was going into shock, and she had multiple injuries. I was told to notify my family and meet the ambulance at the emergency room as soon as possible.

My mother suffered multiple fractures and underwent a very delicate surgery to repair the damage from the fall. I spent most of the next two weeks working from her hospital room and much of the following three months working from her home an hour away from where I lived.

At the time, I was trying to finish my first book, and All Things Admin was just getting established in the admin training market. It was a very ambitious and hectic time for my company and career.

I called my accountant the week my mom fell to get her the information she needed for an annual filing. When I talked to her again three months later, it was time to prepare my taxes, and she sounded concerned. She asked how I was doing and how my business was doing. I said we were both doing fine. I shared that we hadn't launched any new products or broken any

sales records, but things were functioning as close to normal as possible, given the situation. She looked at me with surprise and relief and asked, "How did you do it?" She was concerned when we spoke in January that my mom's accident would put me out of business. I told her there were two big reasons that didn't happen: established procedures and my team.

Since we have documented procedures for nearly everything we do, my team was able to keep things running smoothly while I was out. My colleagues were able to step in and do webinars using the procedures we had in place for delivering them. My team created and published our weekly newsletter. Everything was taken care of – even though I was only putting in a fraction of the hours I usually logged.

Fast-forward two years, and life struck again.

It was the end of August 2013. I had just finished a major client project that had drawn a lot of public scrutiny and media attention. It consumed a lot of my time, energy, and emotion for the previous 18 months. I was filled with relief and exhaustion when I turned off the lights and left the office that afternoon for the long holiday weekend.

The day before, my youngest sister had gone into labor with her first child. I knew I'd be receiving happy news at any minute as I drove home. Just knowing this helped to balance out the exhaustion.

But things did not go as planned.

My sister ran into complications that resulted in a recordsetting labor and emergency surgery to deliver her baby girl. As I paced by the phone and clutched my iPad waiting for notification from anyone, I was preparing for the worst. Thankfully, my sister and her baby girl, Ellyana, both came through the surgery alive and healthy. But the impact this had on me physically, mentally, emotionally, and spiritually was profound.

Ten weeks later, my other sister went into labor...five weeks early.

Sadly, this time the outcome was tragic.

By a complete miracle, my sister survived the delivery, but her newborn daughter, Emma, died within an hour. It's still impossible to explain the tidal wave of emotions that hit me as I processed the news of the birth, and then the loss of my newborn niece shortly after. I felt like time stood still.

In between those two births, my grandfather died. My husband and I were traveling internationally when it happened, so we were unable to get home in time for his funeral. Then, three months later, my mother was diagnosed with breast cancer.

For much of the following six months, my company ran without me – once again, because of procedures and my team. This time, we were even more prepared, because we had filled some gaps that became evident during the previous experiences. I was able to step away from work, be present for my family, and take care of myself during one of the most stressful and awful periods of my life.

The following spring, my husband got a new job in Indianapolis. We moved from Iowa to Indiana during one of my busiest speaking seasons of the year. Within a month, my husband started a new job, we put our house up for sale, I coordinated the packing and moving details for a two-state move, and I traveled to several speaking engagements. Procedures and checklists kept life moving forward for me personally and professionally!

In January 2016, we learned that my mom's cancer had returned, and it had metastasized. We didn't know when the end would be, but we knew it was coming faster than any of us were prepared for. Five months later, my mother died. For several weeks, I could barely pull myself off of the couch, let alone run my business. I have never experienced such complete exhaustion, and I have never been more thankful for procedures and the support of my amazing team.

These are just my personal stories on the importance of procedures. I can recount multiple examples from several of my team members to illustrate the need for them, too.

The takeaway from all of these examples is that procedures are more than just a good idea. They are mission critical to helping you be successful and ready for whatever life throws at you.

My hope is this book will help you with the process of creating, implementing, and updating your procedures so you, too, can enjoy the benefits of this invaluable resource.





Getting Started With Systems and Procedures Documentation

"The secret of getting ahead is getting started."

~ Mark Twain

elcome to *Become a Procedures Pro!*When I launched my blog in 2007, I wrote a three-part series on how to create an administrative procedures binder. I assumed most people knew how to do it. But I was looking for a good topic to start writing about, and I knew this one well. I shared some tips and templates for starting the process, and didn't think much about it.

A few months later, I was reviewing my website statistics, and the topic driving the most traffic each month was the three-part series on procedures development. When I realized a lot of people wanted help with this, I began writing more articles, creating training, and sharing templates to help assistants worldwide start their procedures.

Now, several years later, I'm proud to be referred to as the "procedures pro," and I'm eager to help you create and maintain your administrative procedures.

In this book, I will help you think about procedures in terms of systems, and explain:

- Why you, your company, and your team need procedures.
- The difference between systems and procedures, and why you need both.
- How to map out your systems.
- Best practices for developing effective procedures.
- How to ensure your office runs smoothly no matter what.

Resources, Files, and What I Use

Throughout this book, you'll find these four icons indicating success stories, additional resources, files, or ideas for that chapter. Since products and technologies often change, I don't want to list the specific product brands or names in print. Instead, I've posted links and pictures on our website at **ProceduresPro.com**, so you can always find the latest tools I use and recommend.



The speech bubble icon indicates a **Success Story** from a fellow admin.



The file folder icon indicates a File Download.



The mouse icon indicates a Resource Alert.



The pushpin icon indicates **What I Use.**

My Writing Style

I tend to write in a conversational style. While I do believe in good grammar, correct punctuation, and complete sentences, there may be places where I stray a bit for emphasis. (My editing team usually keeps me in line.) I share this because I know how particular admins, myself included, can be about written materials. Proofing other people's documents is, after all, part of what we do for a living. That said, if you find an error that I should correct in future editions, please visit the Contact page at **ProceduresPro.com** and let me know.

Throughout this book, the terms admin, assistant, and administrative professional are used interchangeably to represent the hundreds of titles that comprise the administrative profession. No matter what your specific title may be, this book is for you. I also use the terms manager, executive,

boss, supervisor, and team when referring to those you work with or report to, but I recognize that there are lots of titles for these people, too.

Let's Get Started!

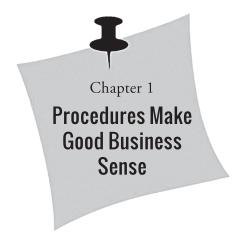
Whether you are creating a procedures binder to complete an official performance review goal, or you're looking for some backup and support for the next time you are out of the office, procedures can reduce stress and improve efficiency in more ways than one!

When you are out of the office, it's nice to be missed. But it's also nice when things run smoothly while you're away so you don't return to a bunch of problems or unhandled business. Procedures help with this – and so much more!

Mapping out your systems and creating your administrative procedures can seem like an overwhelming endeavor if you're just getting started. This book is dedicated to helping you simplify the process and making the project a lot easier!

If you're ready, let's get started on your systems and procedures development!





"What you do today can improve all of your tomorrows." - RALPH S. MARSTON JR., AMERICAN WRITER

s an assistant, you're entitled to time off just like anyone else in the office – but when it feels like your department will come to a screeching halt if you want or need a break, you're not quite as prepared as you need to be.

If an accident, illness, or family emergency were to pull you away from your job, could someone easily fill in for you? If the career opportunity of your dreams came knocking, could you take it without leaving your executive, successor, or company in a lurch? Are you prepared for disasters — natural or otherwise? Procedures can help with all of these things, and that's why they make such good business sense!

Business Continuity

Business continuity – the ability to continue operations, despite an incident or interruption – is something every administrative professional needs to prepare for.

I can tell you from personal experience that the last thing you want to do when a tragedy strikes is try to do your job or run your office from your cell phone or laptop. Procedures allow others to handle tasks in your absence, which can be an enormous relief during difficult times. As I shared in the introduction, I've had a few instances where procedures came to the rescue and allowed me to focus on important family situations — without worrying whether my company would suffer.

Procedures aren't just for emergency situations, though. They can also be extremely useful in keeping things running when you're sick or on vacation. Administrative procedures arm your colleagues with the information they need to cover for you successfully, and demonstrate your commitment to keeping the office running – regardless of what happens!

Disaster Planning and Recovery

Until you experience a natural disaster, you have no idea exactly how important and valuable it is to have documented procedures, contact lists, emergency contact numbers, client information, and vendor information compiled and ready to go.

In June 2008, I lived in Cedar Rapids, Iowa, and my city was literally under water. Several companies were seriously impacted, and not all of them survived the disaster. However, many were able to resume business fairly quickly thanks to disaster recovery and business continuity plans – also known as disaster recovery procedures.

This is just one example of how procedures have helped in a disaster situation, and I've heard countless similar stories from admins across the country. From fires to tornadoes to snow storms, procedures are one key component that can help you and your company recover more quickly from a disaster. This is why you need to create emergency disaster procedures if you don't already have them. If your company does have something in place, get a copy, review it, place it in your binder, and identify what you need to add for your own position, team, and department.

We'll go into greater detail on disaster planning procedures later in this book.

Succession Planning

Have you ever pursued a promotion or had a new job present itself unexpectedly? Procedures are essential if you want to be prepared for career advancement opportunities.

What about retirement? If you are planning to retire in the next few years, it is absolutely necessary for you to document your job with procedures now. Retirement is something you can plan for, so there is no excuse not to do this.

Procedures ensure that your business can continue if you are away from the office. They make it easier for someone to fill in for you, whether you're dealing with an emergency, out of town for a career development opportunity, or just taking a well-deserved break. Procedures make great business sense!





Success Story: "In my previous position, I was employed as a finance and customer service coordinator. My job responsibilities included front desk reception and triaging inquiries from visitors and callers.

Because I was only one of two administrative positions in the office, if I happened to be out at the same time as of our office manager, no other staff knew how to utilize our new phone system. And, although we had a strong core phone team, when someone left or was promoted, it required training a new staff member. The position also included several financial processes, which were time-sensitive and required step-by-step detail in order to ensure accuracy and prompt distribution of related paperwork.

After attending an online webinar regarding office procedure manuals, I knew this was exactly what had to be created. Once in place, the training and information would be consistent as well as easy to follow.

I prepared my first sample and took it to my boss. With some insight and input from her, the new hard copy desk manual was created, along with a phone-system specific PDF version to be distributed to the core backup phone team.

It turned out to be one of the best things I did for that position! When I included the project in my self-evaluation for my annual review, it really impressed our management team. I used it to train my replacement, and she has continued to update and refresh the manual as the processes and systems change. Each position in every office should have a procedures manual. It really does serve as a GPS for guiding people through what needs to be done when you are not around to direct them."

- Kemetia M.K. Foley, CAP-OM

APPENDIX A: COMPLETE CHECKLIST FOR SYSTEMS AND PROCEDURES DEVELOPMENT



File Download: Visit **ProceduresPro.com** to download the following plans of action to get you started creating your office systems and documenting your administrative procedures.

My Systems Development Plan of Action

	Identify where you need to create or improve an administrative system .
	Brainstorm what the ideal system for that item would look like.
	Test it. Fine-tune it. Create your procedures related to it.
	Implement your system(s).
	Repeat.
•	rocedures Development Plan of Action ep 1: Assemble the Right Tools for the Job.
	Assemble the tools needed:
	☐ 1 Extra Wide 3-Ring Binder
	☐ Tabbed Dividers – 8-Tab Sets (2 sets)

	Create a Binder Cover and Spine.
	Create a general Table of Contents.
	Create a permanent home for your Admin Binder on your desk within arm's reach of where you primarily sit/work.
Ste	p 2: Start Tracking Your Tasks for a Few Days.
	Download and/or print the "Administrative Job Duties" tracking form at AllThingsAdmin.com (or place it electronically on your PC desktop) to begin tracking your daily, weekly, monthly, annual tasks for both yourself and those you support.
	Print 30 double-sided, 3-hole punched, BLANK procedures forms to start handwriting your daily procedures on. Place them in a brightly colored file folder, which is easily accessible from where you sit at your desk.
Ste	p 3: Pick Your Top Five Procedures. Repeat.
	Identify the first FIVE procedures you are going to document next week when you return to the office.
	-
	

	Pro	ocedures Ideas to Get You Started:
		Start the Day / End of the Day Checklists
		How to Make the Coffee
		Executives Regular Recurring Meetings
		How to Forward / Un-Forward Phones
		How to Check Voice Mail
Ste	p 4:	Identify What Else to Include.
		eck with ALL internal departments to see if they re procedures already documented that you can use:
		Accounting (expense reports, check requests, etc.)
		Facilities (how to get new keys, parking permits, maintenance requests, etc.)
		Human Resources (new hire checklists, termination checklists, employee handbook, etc.)
		I.T. (user guides for phones, voice mail, video conferencing equipment, conference bridge lines, etc.)
		Mail Room (internal mail procedures, USPS procedures, FedEx or UPS account and shipping info, etc.)
		Marketing (corporate logo use guidelines, business card ordering, etc.)

	Travel (online booking tool procedures, after hours info, etc.)	
Pr	ocedures Ideas to Get You Started:	
	Sorting/distributing the incoming mail and shipping packages – UPS/FedEx/USPS	
	Office Supply Ordering	
	New Employee Checklists	
	Travel Itinerary and Travel Planning Details	
	Event Planning Checklists	
	Meeting and Agenda Prep Checklists	
Brains general ca	torm about procedures you should create for these tegories:	
	sic Office Operations	

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Checklists / Forms / Templates
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Step 5: Organize Your Binder for Ongoing Use.
Finalize the tabbed sections you need to include in your procedures binder.
Update your table of contents to reflect the order of the materials in your procedures binder.
Add a recurring reminder to your calendar or tasks to update this binder on at least a quarterly basis.
Pat yourself on the back for all of the progress you've made on your administrative procedures project! Congratulations!

Send Julie Perrine and her team an email sharing your awesome accomplishment! Email us at AdminSuccess@ AllThingsAdmin.com.

APPENDIX B: HOW TO USE THIS PROCEDURES BINDER WELCOME LETTER

Insert a "how to use this binder letter" at the beginning of the binder for those filling in for you.

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]



OTHER BOOKS BY JULIE PERRINE



The Innovative Admin: Unleash the Power of Innovation In Your Administrative Career

Do you want to be the admin every executive wants by his or her side? Do you want to standout and have success in your career?

If your answer is "yes," then *The Innovative Admin* is for you!

This must-have book for admins helps you learn how to embrace innovative thinking that makes you invaluable to your executive, your co-workers, and your company. You will discover:

- What it means to be *The Innovative Admin*.
- How you can unleash your mind to think innovatively.
- Techniques you can use to bring out the administrative leader inside you.
- Ways you can tap into your creativity and initiative to get ahead.

The Innovative Admin empowers you to become the best you can be by enhancing your capacity for innovation!

TheInnovativeAdmin.com



The Organized Admin: Leverage Your Unique Organizing Style to Create Systems, Reduce Overwhelm, and Increase Productivity

Are you struggling to make sense of the disorganized chaos that is your workspace? Do you want more effective systems for keeping yourself and your executive organized? Do you want to better understand your unique organizing style?

The Organized Admin, offers advice, information, and resources on developing simple organizing systems that promote administrative career success. You will discover:

- What it means to be organized.
- How to organize everything from ideas and your workspace to meetings, travel, projects, and more!
- Insights into your unique organizing style preferences for time and space.
- Simple organizing principles you can implement in your day-to-day activities.

The Organized Admin empowers you to be a better administrative professional by teaching you simple, practical solutions for getting organized – and maintaining organization in all areas of your career!

TheOrganizedAdmin.com

OTHER PRODUCTS AND TRAINING FROM ALL THINGS ADMIN

AdminPro Training Series

AdminTech Crash Course

Administrative Procedures Toolkit

5 Days to Better Office Procedures Challenge

Kick-Start Creating Your Administrative Procedures Binder

Myers-Briggs Type Indicator Personality Assessments

Partnering With Your Executive

The Latest Innovation is You!

Professional Portfolio Builder

Creating a Powerful Professional Portfolio

Boost Your Professional Visibility With An Online Portfolio

Creating Your Strategic Administrative Career Plan

Travel Planning

Template Packages

Virtual Training On Demand

Visit **AllThingsAdmin.com** for information on these products and many more.



About the Author

Julie Perrine

Certified Administrative Professional® – Organizational Management Certified Myers-Briggs Type Indicator® Administrator Certified Productivity Pro® Consultant

Julie Perrine, CAP-OM, is an administrative expert, trainer, motivational speaker, and author. She is the founder and CEO of All Things Admin, a company dedicated to developing and providing innovative products, training, mentoring, and resources for administrative professionals.

Julie has more than 25 years of experience in the administrative profession spanning several industries and serving in corporate and startup settings. Her mission is to guide, encourage, and connect administrative professionals to the technologies, ideas, resources, and people they need to achieve professional success. Her upbeat, straightforward approach to handling opportunities and challenges gives admins proactive strategies for developing a plan, making progress, and achieving results.

Julie has created several innovative tools and programs for administrative professionals, including the Administrative Procedures Toolkit, Kick-Start Creating Your Administrative Procedures Binder Course, Professional Portfolio Builder, and ePortfolio Builder. She is the author of *The Innovative Admin: Unleash the Power of Innovation In Your Administrative Career, The Organized Admin: Leverage Your Unique Organizing Style to Create Systems, Reduce Overwhelm, and Increase Productivity, and several eBooks — including Your Career Edge: Create a Powerful Professional Portfolio, and Your Career Edge: Create a Professional Online Portfolio.*

Julie transformed a career as an administrative professional into several successful enterprises and shares her knowledge, expertise, and resources with individuals, corporations, and organizations as an online business model consultant, personality type strategist, and productivity expert.

Julie writes regularly for the Executive Secretary Magazine and All Things Admin, and her articles have been published in professional publications worldwide. She has been active in local and international organizations, including the International Association of Administrative Professionals and the National Association of Productivity and Organizing Professionals.

To inquire about having Julie Perrine speak at your next meeting, contact us at **AllThingsAdmin.com**.



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Twitter.com/JuliePerrine Twitter.com/ProceduresPro

LinkedIn

LinkedIn.com/company/All-Things-Admin LinkedIn.com/in/JuliePerrine

For downloadable resources mentioned in this book, visit ProceduresPro.com.

To inquire about having Julie Perrine speak at your next meeting, contact us through our website at **AllThingsAdmin.com**.



Acknowledgements

riting my third book has been the most enjoyable author experience yet. Part of that is because procedures are my happy place. The other reason I attribute directly to creating a system for doing it with my second book that my team and I were able to follow and tweak as we worked on my third book. Systems work!

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