

A

PROJECT ON

**OFFICE EFFICIENCY AUDIT & TRAINING GUIDE
FOR THE ACCOUNTS DEPARTMENT OF WAGES
LIMITED**

BY PROJECT TEAM B

OF THE COMPUTER OPERATIONS TRACK

**IN PARTIAL FULFILLMENT OF THE
REQUIREMENTS FOR THE IDEAS
PROGRAM**

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Digital Skill: COMPUTER OPERATIONS

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1.0 INTRODUCTION

1.1 Background

Digital Transformation in modern business operations is a strategic imperative for enhancing productivity, reducing costs, and minimizing errors. This project focuses on conducting a comprehensive efficiency audit of the Accounts Department at Wages Limited. The goal was to apply operational analysis and digital tool proficiency to identify key inefficiencies and design a practical training guide to facilitate improvement. The project employed a structured workflow using Microsoft Excel, Word, and PowerPoint to analyse, document, and present findings and solutions.

Office audits play a crucial role in pinpointing procedural bottlenecks and manual redundancies. A well-executed audit provides a clear roadmap for implementing digital solutions, automating processes, and training staff, ultimately leading to a more streamlined and effective departmental workflow.

1.2 Problem Statement

The Accounts Department at Wages Limited faces significant operational challenges due to reliance on manual processes, lack of automation, and poor communication channels. This leads to excessive time spent on routine tasks, duplicate data entry, unorganized files, and overall inefficiency. The challenge was to systematically identify these pain points, quantify their impact, and design an actionable digital transformation training pack to address them.

1.3 Project Objectives

- To conduct a thorough audit of the Accounts Department's tasks to identify key inefficiencies and time sinks.
- To develop a quantitative analysis in Excel to log tasks, calculate time/cost savings, and visualize data.
- To create a comprehensive training manual in Word with step-by-step guides for improved processes.
- To design an interactive PowerPoint workshop to effectively communicate findings and train staff on new procedures.
- To understand and apply office efficiency methodologies and digital tool integration.

- To enhance departmental performance through actionable recommendations and staff training.

1.4 Scope of Study

This project focuses on the audit, analysis, and training design for the Accounts Department of Wages Limited. The scope includes building a process tracker in Excel, creating a reference manual in Word, and developing a staff training workshop in PowerPoint. The project deliverables are designed to be implemented by the company to achieve immediate efficiency gains.

1.5 Project Selection

This project was executed by 12 trainees, divided into 3 sub-groups, with each group focusing on a core component of the final deliverable:

- **Sub-group 1:** Excel Process Tracker & Data Analysis
- **Sub-group 2:** Word Training Manual
- **Sub-group 3:** PowerPoint Interactive Workshop

2.0 LITERATURE REVIEW

2.1 Overview of Office Efficiency & Digital Transformation

Effective office management hinges on streamlined processes and the strategic adoption of digital tools. Modern offices leverage software like the Microsoft Office Suite to automate repetitive tasks, centralize data, and improve collaboration. The transition from manual, paper-based systems to digital workflows is critical for reducing errors, saving time, and enabling data-driven decision-making.

2.2 Related Works

- **Industry Best Practices:** Leading firms utilize centralized Customer Relationship Management (CRM) and Enterprise Resource Planning (ERP) systems to automate tasks like payment processing and report generation.
- **Academic Research:** Studies consistently show that automating data entry and implementing shared digital file systems can reduce task completion time by over 50% and significantly decrease error rates.
- **Case Studies:** Companies that have invested in digital literacy training for staff report higher adoption rates of new technologies and greater overall productivity gains.

2.3 Research Gap

While the benefits of office automation are widely known, many small to medium-sized enterprises (SMEs) like Wages Limited lack the tailored, practical roadmap for implementation. This project addresses that gap by providing a specific, actionable, and ready-to-deploy audit report and training package designed for the unique challenges of an accounts department in a smaller organization.

3.0 METHODOLOGY

3.1 Tools and Resources

The project utilized the core applications of the Microsoft Office Suite, selected for their ubiquity and powerful features:

- **Microsoft Excel:** Used for its advanced formula functions (SUM, COUNTIF), charting capabilities, and data organization to create a dynamic process tracker and impact analyzer.
- **Microsoft Word:** Employed for its powerful formatting tools, including Styles, Table of Contents, and hyperlinks, to create a professional and easy-to-navigate training manual.
- **Microsoft PowerPoint:** Chosen for its animation, trigger, and design features to build an engaging and interactive staff training workshop.

3.2 Project Process

1. **Process Auditing & Brainstorming:** Conducted research and brainstorming sessions to identify common office inefficiencies within an accounts department context.
2. **Quantitative Analysis in Excel:** Built a detailed log template to track tasks, time spent, identified issues, and recommendations. Used formulas and charts to quantify the impact and prioritize issues.
3. **Manual Development in Word:** Synthesized findings from the Excel tracker into a structured training manual with clear, numbered steps, screenshots, and a navigable table of contents.
4. **Workshop Design in PowerPoint:** Transformed the data and manual into a compelling narrative for staff training, incorporating data visuals, animated quizzes, and speaker notes for delivery simulation.

3.3 Deliverables & Features

- **Excel Process Tracker:** A dynamic spreadsheet with fields for Task, Time Spent, Issue Identified, Recommendation, and Priority. Features automated calculations and visual charts.
- **Word Training Manual:** A comprehensive guide broken into short topics with step-by-step instructions, internal hyperlinks, and a professional layout using Word's style features.
- **PowerPoint Interactive Workshop:** A staff-facing presentation that includes:
 - **Executive Summary & Problem Analysis:** Presents key data and inefficiency causes.
 - **Audit Task Details:** Showcases the full data table from the Excel analysis.
 - **Key Highlights & Priority Charts:** Uses visual data summaries for impact.
 - **Development Tasks & Solutions:** Outlines the recommended actions.
 - **Interactive Quiz Slides:** Includes animated questions to test staff knowledge.

AUDITING OF ACCOUNTS DEPARTMENT OF WAGES LIMITED

TASK		RECOMMENDATION	EXPECTED Time	Priority
1 Payment Confirmation	20	Lack of automation	automate process	3 High
2 Issuance of receipt	16	Lack of automation	automate process	5 High
3 Fund disbursement	18	Lack of automation	use templates	3 Normal
4 Accounts reconciliation	22	No centralized system	Train staff on new tool	4 High
5 Budgeting	19	Manual process	use template	2 High
6 Financial Analysis	12	Time-consuming report	automate process	3 Low
7 Pay Roll preparations	14	Manual process	use templates	2 Normal
8 Entering cash inflow	10	Duplicate data entry	automate	2 High
9 Recording Assets	17	Duplicate data entry	use templates	3 Low
10 Preparing and filling Tax forms and re	20	No centralized system	Train staff on new tool	8 Normal
11 Balance Sheet preparations	18	No centralized system	automate	5 Normal
12 Preparing Income statement	18	Duplicate data entry	Train staff on new tool	6 High
13 Data Entry	23	Time-consuming report	use templates	8 Normal
14 File organization	10	Lack of automation	use templates	5 Low
15 DTA preparation	12	Duplicate data entry	Use shared folder syst	6 low
16 Leave Request	12	Poor communication	use templates	3 Low
17 Invoice processing	10	Time-consuming report	use template	2 Normal
18 Report preparation	17	No centralized system	Use shared folder syst	3 High
19 Customer Support log	14	Poor communication	Apply macros in Excel	4 High
20 Document Approval	15	Manual process	Use CRM system	5 low
Totals	317		82	

Figure 1: Snapshot of the Excel Process Tracker with formulas and charts, designed by sub-Group 1.

4.0: RESULTS

4.1 Key Findings

- The audit identified **317 total hours** spent on departmental tasks weekly, highlighting a significant opportunity for time savings.
- The most critical inefficiencies were **Lack of Automation** (64 hours spent) and **No Centralized System** (77 hours spent), representing the highest-impact areas for intervention.
- The use of Excel's formulas and charts effectively quantified the potential time savings, providing a data-driven foundation for all recommendations.
- The structured workflow from Excel (data) → Word (manual) → PowerPoint (training) ensured consistency and clarity across all deliverables.

4.2 Project Outcomes

The project resulted in a complete Office Efficiency Training Pack for Wages Limited. The pack provides a clear diagnosis of problems and a practical path to resolution.

Key outcomes include:

- A **prioritized list of tasks** for improvement, categorized as High, Normal, and Low priority.
- **Specific recommendations** for each inefficiency, such as process automation, template adoption, and implementation of shared folder systems.
- A **professional training manual** that serves as a lasting reference for staff.
- An **engaging workshop** designed to secure staff buy-in and effectively communicate the necessary changes.

4.3 Problem Analysis

01. Lack of Automation & Poor communication:

- Several tasks, such as Payment Confirmation, Issuance of receipt, are not automated.
- Tasks like Leave Request suffer from poor communication, leading to delays.

02. Excessive Time spent on tasks & Unorganized Files:

- The total time spent on tasks is 317 hours.
- Tasks like DTA preparation are hindered by unorganized files.

03. Manual Processes & Double Data entry:

- Many tasks, such as Budgeting rely on manual processes.
- Tasks like Entering cash inflow involve duplicate data entry.

Key Highlights

Issues Identified	Total Time Spent/hr	Recommendation Expected	Priority
Lack of automation	64	Automatic process	High
No centralize system	77	Train staff on new tools	High
Manual Process	48	Use CRM System	Normal
Duplicate Data entry	45	Use Template	Normal
Unorganized Files	12	Use share folder system	low
Poor Communication	26	Use Microsoft teams	low
Time Consuming Report	46	Use Template	Normal

Fig 2. A table showing some of the issues identified and ways to sort them out

5.0: CONCLUSION AND RECOMMENDATIONS

5.1 Summary of Findings

The audit and subsequent training guide development successfully identified and quantified major inefficiencies within the Accounts Department of Wages Limited. The project delivered a robust, three-part solution—comprising a data analysis tracker, a training manual, and an interactive workshop—that provides a clear and actionable roadmap for digital transformation and significant efficiency improvement.

5.2 Limitations

- The audit's findings are based on observational and self-reported data; live monitoring of tasks could provide even more accurate time measurements.
- The successful implementation of recommendations depends on Wages Limited's commitment to investing in new software tools and dedicating time for staff training.
- The training materials assume a baseline proficiency with digital tools; additional foundational training may be required for some staff members.

5.3 Recommendations

- **Immediate Implementation:** Begin with the High-priority tasks, focusing on automating payment confirmations and implementing a centralized system for accounts reconciliation.
- **Invest in Technology:** Adopt recommended software solutions, such as a CRM system, automated accounting software, and a collaborative platform like Microsoft Teams.
- **Phased Training Rollout:** Use the developed training pack to conduct workshops, starting with the High-priority areas, and use the Word manual as an ongoing reference.
- **Continuous Improvement:** Establish a quarterly review process using the Excel tracker to monitor progress, identify new inefficiencies, and ensure continuous operational improvement.