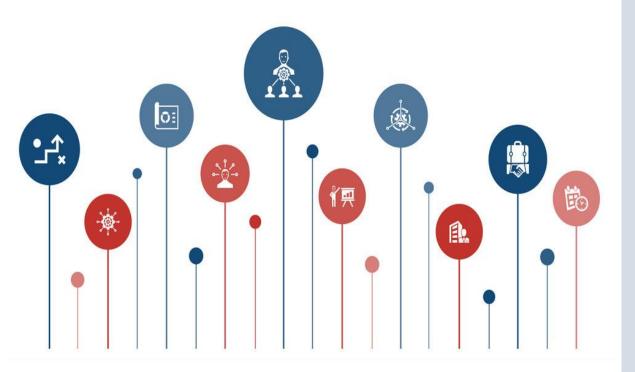# ADMINISTRATION
CREATIVE CONCEPT

Effective Office Professional & Records Management Program

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Effective Office Professional & Records Management Program

Introduction:

This program is designed to prepare you to operate in a records management program in any organizational setting. With the increasing production of and demand for complex information and the widespread use of automated technologies, businesses, non-profit organizations and government agencies are striving to manage their information assets in an effective and efficient way. Records and information management programs contribute to the efficiency of an organization's operations by providing systematic control of information resources, from creation through use, storage and final disposition.

With today's growing demand of complex information and use of automated technologies, businesses are continually striving to manage this information effectively. The Records and Information Management Certificate program will aid students in effectively managing this complex information by providing systematic control of information resources, from creation through use. Learn how to operate a records management program for any business or organizational setting.

This course is designed to provide the candidates with the opportunity to review and develop interpersonal and professional skills needed to do their jobs effectively, thereby contributing to personal and organizational success. It covers the strategies, tools, and technologies used to capture, categorize, manage, store, preserve (archive), and deliver documents and records in support of business processes, as well as the core components of ISO 15489. You will be more able to explore in more detail the issues involved in meeting responsibilities for managing documentation and records.

Who Should Attend?

Administrative, Secretaries, Clerks, Document Controllers, Executive Secretaries, Administrative Assistants, Assistant Controllers, Data Loaders, Camp Admins, Projects Administrators, Technical Assistants, Office Managers, anyone involved in office management, administration skills and knowledge and are interested in understanding document and records management best practices and how it can be implemented successfully

Course Objectives:

By the end of this course delegates will be able to:

- Extend understanding of roles as office managers and administrators and the key contribution they make to achieve success

- Review and develop organizational, communication and interpersonal skills

- Develop an action plan to work in more effective and efficient ways

- Understand the key concepts and overall architectural scope of records and document management

- Develop business cases and business requirements for records management systems

- Identify the business drivers for improving document and records management

- Determine how document and records management can be implemented

- Assess the implications of technologies, including Enterprise Content Management (ECM) on document and records management

- Understand the key concepts and overall scope of ISO 15489 and how to apply ISO 15489

Course Outline:

Roles, Competences & Personal Effectiveness

- Introduction and objectives

- Action planning

- The 'competence' model of skills, behaviors and values

- Personal competence review

- Time management constraints: resources, systems, other people and self

- Handling requests and conflicting priorities

Team Working, Communication, Meetings, Team Working & Team Roles

- Briefing skills – giving, receiving and passing on

- Organizing, and participating in meetings

- Notes, minutes and follow-up

Managing Working Relationships, Communication Skills & Supervising Admin Staff

- Giving and receiving delegation

- Coaching and training colleagues and staff

- Communication and listening skills

- Building rapport

- Developing a network of working relationships

- Assertiveness and conflict

- People problems and problem people

- Helping others perform

- Practical motivation

- Criticism skills

Managing Time, Desk Management, Office Technology & Writing Skills

- Planning and priority setting

- Office layout and ergonomics

- Managing the paper-load and developing paperless systems

- Getting the best from office technology

- Letter writing

- E-mail efficiency and etiquette

- Writing and editing reports

- Proof-reading skills

- Setting up, developing writing layout and style guidelines for the organization

- Writing and designing presentation slides

Managing Information & Budgets

- Principles of information management – scheduling, filtering and digesting

- Interpreting and presenting statistical information

- Designing and using graphs

- Designing surveys, presenting findings and interpreting meaning

- Basic concepts of financial management

- Monitoring budgets and variance

Improving Customer Service & Systems

- What is customer service?

- How to improve customer service and systems

- How to achieve continuous improvement

- Action planning

Strategy & Understanding Key Elements of Documents & Records Management

- Introduce document and records management

- ISO 15489 Part 1 and Part 2 overview

- Business case and drivers

- Business requirements for managing document and records

- Managing information as an asset

- Understanding the terminology

- Document and records management strategies

- Information governance

Concepts and Set-up Components

- Document and records life-cycle

- Capture and storage management

- Storage and handling

- Preservation and archiving

- Metadata and indexing

- Classification schemes

- Searching and retrieving

- Controls and security

- Legislation, standards and regulation

Process & Delivery

- Information gathering: audit and survey

- Building a business case

- Defining business requirements

- ISO 15489 Part 1

- How to set ISO 15489 policies and standards

- Assigning responsibilities and authorities

- Establishing procedures and guidelines

- Business classification scheme

- IT infrastructure details

- Model office and rollout

Implementation Planning

- Implementation planning

- ISO 15489 Part 2

- Designing, implementing and administering specialized systems for managing records

- Integrating records management into business systems and processes

- Information audit: monitoring compliance

- Project and program planning