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### Principles of Providing and Maintaining Administrative Services

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#### Understand how to order products and services

All organisations have their own specific procedures for ordering and supply of products and services, but they will all apply some basic principles. The reason for having procedures is to ensure a continuity of supply that fits in with the demand for that product or service. In turn this will enable the user to maintain productivity. This could be as simple as an every day commodity such as paper – imagine the consequences in an office such as a solicitor or estate agent if they ran out of paper and all the secretaries were unable to print out letters and documents. When ordering products on a one off basis it will equally apply that the item or service is organised and arranged using a specific procedure. Arranging for the curtains or carpets to be cleaned in an office would most likely be arranged for an evening or weekend, when it would interfere least with the ongoing work. So, whatever the service or product required there should be a procedure to ensure that all happens smoothly.

For routine products such as ordering the office stationery it is helpful if one person has responsibility. This will then ensure that over ordering or running out of goods should not occur. The appointed person will normally use some form or record keeping –probably an application of Excel these days, but in the past a book was quite common. Colleagues will be invited to request supplies either from the appointed person directly (probably by email) or there will be a mechanism for them to order via their internal computer links. The important thing here is that there will be a written record of what was requested and this should ensure that the person requesting the item orders only what is required for the job. In many organisations two or more people are required to agree and sign for an order. The reason for this is to try and reduce or eliminate theft and to ensure that the items are really necessary.

Whatever the ordering procedure is, the written documentation should show a trail for the purpose of audit. In six months time it should be possible to look at the records and see exactly who ordered what, on which day. If authorisation is required, who provided it, and in larger organisations there will probably be the need to produce a budget number as individual departments will be responsible and accountable for their expenditure.

It may be that some supplies are kept by the person appointed to deal with supplies – for example paper. This would be particularly important if the company uses pre-printed headed paper or special paper for letters or documents. This person would then be responsible for monitoring their stock level and re-ordering before the supply runs out.

When supplies are delivered it is equally important to record date, quantity, and who received the goods to complete the story for the audit trail. Some organisations again ask for a separate person to record the safe arrival of the items – a further measure to prevent theft. It

sounds draconian but “pinching things” is not new and items such as small batteries disappear very easily – they won’t notice one!

Suppliers will naturally vary in how they receive orders. Small suppliers will often accept phone calls or emails requesting items. Large suppliers will normally have a website on which orders can be placed. Either way, a copy of the order is equally vital for that audit trail.

Before you do anything it is essential to know what you need to order, right down to the last detail. It is no good ordering normal paper when it was self duplicating paper that was needed. Some organisations will have codes for the products normally used to make things easier. When ordering larger materials or equipment it is important that you know the type or printer or what office chair is best suited to the user. Some larger organisations need to hire plant so this has to be very clear as there is no point hiring a van when a lorry is needed. If you are arranging a service (e.g. interpreter) from another person then you need to know what is expected from them and if they possess the right skills for what is needed.

We are all aware of the environmental factors affecting our planet. This is something to consider when ordering. The environmentally friendly product may not be the cheapest but is better for the environment.

Selecting the products and services that represent value for money should ultimately save the company money. Although, cutting costs on some items is not always best practice and may make the company look unprofessional. For example buying cheap paper to send important letters to clients or buying a cheap printer just for the short term when in the long run a better one would last longer.

If you constantly review the process for ordering products and services you are able to identify whether the process is efficient and effective and if delivery times are being met. If not, you are then able to do something about this to improve the procedure or service at the earliest time possible.

### **Understand how to keep waste to a minimum in a business environment**

Waste has a huge impact on our carbon footprint and to the cost of running a business.

There are many causes of waste in a business environment and many things you can do to prevent it:

Paper - Proof read before printing, ask yourself do you need to print, email instead of printing, double side when printing or photocopying and use any scrap paper to make note pads.

Envelopes, plastic wallets & folders – Re use them if you can.

Electricity – Turn off computers, monitors and other electrical equipment, do not leave equipment charging over night or for longer periods than necessary and turn lights and heating off when not needed.

Many businesses have recycling policies and have put into place measures to make it easy to recycle. You may have an external company that takes away the shredding, toner cartridges

or even batteries. There are sometimes allocated bins for paper, cardboard, tins, plastic and glass.

## **Understand the purpose of delivering effective customer service**

It is best practice to be aware of your organisation's competitors to ensure you are offering a competitive service as well as one that is up to date with current political, social, economical and technological factors (PEST).

It is important that organisations carefully plan what products/services they offer to make sure they will be beneficial to both the customer and the company. Thorough research should be conducted before implementing a new service offer to make sure the customer demand is there to prevent waste of money and resources.

Every organisation can develop their service offer by getting to know their customers to find out exactly what they need and what they expect from the service provider. Exceeding your customers' expectations will lead to a good reputation, therefore retaining your old customers and gaining new ones.

There are several ways an organisation can do this, for example by verbally asking the customer if they are happy with the service they are receiving, whether there is anything they would like to be offered that isn't currently available, or by contacting customers over the phone to ask if there is anything else that they need. This adds a personal touch as the customer is being treated as an individual. Some organisations also carry out customer service surveys to identify areas for improvement.

Once you know what your customer wants you must do your best to meet this, you must be flexible and adapt your services to meet the individual customer needs. Most importantly you must ensure you keep the promises you have made, if you say you will provide a specific service then you must provide it!

Depending on the type and size of the organisation as well as its financial status the service offer can vary greatly. Every organisation will have its limits on resources. This can include everything from the level of staffing to what is available on the shelf.

## **Know how to take minutes**

Few meetings are held without a written record being made of them. These can range from a brief handwritten note to a set of formal minutes.

Minutes are a record of the proceedings of a meeting and are kept for record purposes; they are usually a brief and accurate record of discussion and decisions.

As an administrator you may be required to take minutes of meetings. Historically, secretaries have performed this duty, but due to the use of Information Technology, the role of an administrator is expanding and an administrator may be asked to perform this duty.

The proceedings of a meeting can be very fast and historically secretaries have recorded minutes of meeting by using shorthand. This requires learning and development, usually in

the form of a formal training course. However, shorthand is not widely used nowadays and it may be possible to summarise the main points of the meeting by writing these in long hand, using accurate and brief points. Another good method is to record the meeting on a tape or digital recorder so that you can refer back to this. However, minutes should be:

- **Accurate** – so that they present a true record of the proceedings
- **Brief** – so as to provide a summary of the important matters discussed and decisions reached for reading and confirmation at the next meeting and for future reference.
- **Clear** – so those absent from a meeting can be fully informed of the proceedings.

When a set of minutes are typed, care should be taken to ensure the layout is easy to follow. The items should be recorded as they appear on the agenda, with a number and heading, then a sub-heading and number. Usually, after a meeting, some of the participants will be allocated responsibilities; it is therefore good practice to include a right hand margin with the title Action and record the participants' initials so that they know they have to do something.

## Understand how to organise meetings

As an administrator you may be called upon to organise and support business meetings. Meetings form a major part of communications within the modern business world.

The clear advantage of calling a meeting is that they enable face-to face contact with a number of people at one time, whereas if the communication were done by written communication, it would be difficult to gain a full overview of decisions, involvement etc. It is an opportunity for gaining a wide cross section of opinion where two-way dialogue is encouraged via the asking/answering of questions.

What is important for an effective meeting to take place is that the right people are invited and that they are sufficiently briefed in advance so that they can make a worthwhile contribution. The disadvantage of a meeting is that they can become too numerous, resulting in a great deal of frustration and boredom, owing to a lot of lengthy and often irrelevant discussion, and achieving little or nothing. Also it can be difficult to arrange dates and times convenient for all those who ought to attend, especially when sufficient notice is not given and the people attending have prior commitments.

Careful advance planning can diminish a lot of these drawbacks and preparation and an administrator will play a significant part in this.

### Types of meeting

Meetings may fall into the following categories

- Formal or informal
- Internal or external

However, depending on the size and sector of the organisation, some of the informal meetings may be conducted in a very formal manner.

### **Informal meetings**

Departmental meetings: These will usually be held either to pass information down the organisation or to receive progress reports on each department.

Managerial briefing/progress meetings: These will occur frequently between a manager and the staff and will form a vital part of the decision making process. Sometimes the manager will brief the staff, whereas at others the staff will contribute by sharing ideas, opinions.

Working parties/Quality Circle: The setting up of a working party is a popular approach to solving problems by gathering together a group of individuals from different areas of work, with a different level of responsibility and with different degrees of expertise. Such a group can often bring to a problem a fresh approach and the structure of this type of meeting permits great flexibility and encourages contributions from all levels.

Performance Appraisal Meeting: This meeting is arranged to discuss performance of an employee and is usually conducted between the employee and the Line Manager, but may involve input from other people. These usually take place annually, but depending on the organisation may occur more frequently.

### **Formal meetings**

Annual general meetings: These are usually required by law and must be held within 15 months of the last AGM. They provide a means by which an organisation can reappraise its business for the past year in the form of an annual report, elect or re-instate office holders for the coming year and generally declare future intentions. This type of meeting is open to shareholders of the organisation and they must be invited in accordance with legislation, for example – rights of proxy, within sufficient time-scales.

Extraordinary general meetings: These meetings are also open to all shareholders. They are called at the request of the representatives of 10% of the total voting shares when it is considered desirable to discuss any special business or adopt resolutions for change.

Statutory meetings: These meetings are also required by law to ensure proper communication between the directors of a company and its shareholders. Such a meeting must be held not earlier than one month or later than three months after a company commences trading. It is the duty of such a meeting to consider a statutory report which has been circulated previously to all members. Many local governments are statutory by nature – i.e.: their establishment is required by Act of Parliament.

Board meetings: These are management meetings of the board of an organisation attended by Directors and/or Trustees and chaired by the Chairman of the Board or his/her Deputy. In reality these meetings may be relatively informal in nature, depending on the size and composition of the Board and the business to be discussed. The Chairman usually has the casting vote on decision making, should it be necessary.

Committee meetings: Committees are established to advise, decide and manage a business. There are a variety of types of committee. These include Executive, Standing, Advisory, Subcommittee, Ad hoc, Joint consultative.

## **Internal /External meetings**

### Internal venues

Depending on the size of the organisation that you work for, you may have just one or several rooms available. However, in each case it is good practice to operate a booking procedure for rooms to avoid double bookings. Factors to consider when booking an internal venue:

- Size and suitability of room
- Seating/table arrangements
- Directions to the venue (external visitors may be invited or the venue be unfamiliar for internal participants)
- Car parking
- Refreshments (remember to consider special dietary requirements)
- Equipment (e.g. sound, visual etc)
- Emergency procedure
- Special requirements (e.g. hearing loops)

### External venues

Arranging an external venue usually takes a lot more time and effort, unless it is a regular occurrence where you may have contacts or arrangements set up for you.

As an administrator, it is very important when arranging an external venue that you obtain a clear brief on the type of venue required. Factors to consider when booking an external venue:

- Budget
- Location
- Accommodation nearby if visitors travelling distances to venue
- Size and suitability of room
- Seating/table arrangements
- Directions to the venue (external visitors may be invited or the venue be unfamiliar for internal participants)
- Car parking
- Refreshments (remember to consider special dietary requirements)
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## Agenda

Meetings will follow an *agenda*. The agenda is a programme of the details of the business to be discussed at a meeting, in the order in which they are to be taken. The agenda is usually sent to all meeting participants before the meeting takes place in order to give them adequate notice and to enable them to prepare for the meeting. Occasionally, the administrator may be required to ask for Agenda items from participants in advance.

The agenda is usually prepared by the Chairperson (person with overall control for *chairing* or *running* the meeting) or it could be a “rolling” agenda, whereby the meeting takes place on weekly, monthly or quarterly basis and could remain the same for all meetings. An example of an Agenda for a formal meeting:

<p><b>SW TRAINING LTD</b></p> <p><b>MANAGEMENT QUARTERLY MEETING</b></p> <p><b>AGENDA</b></p> <p>Meeting to take place at 10.30am on 10<sup>th</sup> October 2004</p> <p>in The Board Room, SW Training Ltd</p> <ol style="list-style-type: none"><li>1. Present</li><li>2. Apologies for absence</li><li>3. Minutes of last meeting</li><li>4. Matters arising from minutes of last meeting</li><li>5. Admin Department Report</li><li>6. Sales Department Report</li><li>7. Training Department Report</li><li>8. Any Other Business</li><li>9. Date of Next Meeting</li></ol>
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## Supporting meetings

Part of an administrators' duties may be to support business meetings. The following table describes duties that you may be required to do when supporting meetings.

<b>Before the meeting</b>	<b>On the day of the meeting</b>	<b>After the meeting</b>
Prepare and circulate the agenda for the meeting	Prepare the venue for the meeting, ensuring appropriate table and seating arrangements are available	Ensure that all documents are returned to the office

Book a suitable venue and arrange refreshments	Prepare or arrange for refreshments to be available	Prepare draft minutes for approval by Chairman
Check attendance and record any apologies to distribute to Chairperson	Check that participants sign the attendance register or make a note of all participants	When approved, type the minutes in final form and distribute to participants and any other persons required
Prepare resources; these could include:  Stationery Spare copies of agenda or previous minutes Any other papers required Attendance register, if required Equipment such as multimedia projector etc	Record the details of the meeting, known as minutes	Diarise the next meeting in diary systems and organise venue, refreshments etc

## Understand how to organise events

Business events take place for a number of different reasons. They range from business parties of celebration, to advertising events and company training days or annual network conference meetings. Whatever business event takes place with your organisation, it is important that you support the event as best you can.

You may not be responsible for running and managing the event, however, your support can help make the event a success and increase your company's' reputation to prospective customers.

The person in charge of organising the event may ask you for support by getting you to check the availability of a meeting room or venue and, if available, they may ask you to book this. You may be asked to help collate papers and information material together to give out at the event; this could be advertising posters/flyers to meeting agendas and reference material.

You may also be asked to research information on caterers, organise the refreshments for the event or even help clear up after the event; all of which helps to make the event run smoothly and more efficiently.

## What support can be given before, during and after the event?

Your support will be stretched to complete various tasks that helps organise the event beforehand, help and advice during the event and then help after the event to finalise any outcomes from the event.

You won't be expected to complete all these tasks but you may possibly be asked to help with quite a few of them.

Before the event	On the day of the event	After the event
Prepare and circulate the agenda for the event	Prepare the venue for the meeting, ensuring appropriate table and seating arrangements are available	Ensure that all documents are returned to the office
Book a suitable venue and arrange refreshments	Prepare or arrange for refreshments to be available	Prepare draft minutes for approval by Chairman
Check attendance and record any apologies to distribute to Chairperson	Check that participants sign the attendance register or make a note of all participants	When approved, type the minutes in final form and distribute to participants and any other persons required
Prepare resources; these could include: <ul style="list-style-type: none"> <li>• Stationery</li> <li>• Spare copies of agenda</li> <li>• Any other papers required</li> <li>• Attendance register</li> <li>• Equipment</li> </ul>	Record the details of the meeting known as minutes	Diarise the next meeting in diary systems or confirm the outcomes of the event

The support that you provide can also depend on the event that is taking. There is normally a different type of workload involved in an external event than there is in an internal event as the majority of resources are readily available.

## **Internal venues**

Depending on the size of the organisation that you work for, you may have just one or several rooms available. However, in each case it is good practice to operate a booking procedure for rooms to avoid double bookings.

Factors to consider when booking an internal venue:

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When an event is taking place internally or externally, your behaviour is paramount to giving your customers and other organisations present a positive impression of yourself and the organisation you work for. Key skills that are expected from you during an event are:

- Polite and friendly manner
- Approachable
- Professional attitude

- Respectful to others
- Considerate of others feelings and work commitments
- Flexibility to adapt to different situations
- Ability to problem solve and handle objections
- Good organisational skills
- Good presentation skills
- Outstanding communication skills with the ability to adapt the type of communication used
- Helpful
- Informative and knowledgeable about the event and the subject involved

Not only would you give off a positive impression of yourself and your organisation to others by portraying the above qualities and skills but you will also increase the chances of obtaining more customers and keeping the repeat business.

## Understand how to manage diary systems

Diaries are an essential planning aid that all organisations will use at some point; some use them more than others depending on the nature of the business. It is important to use a diary to help teams and individuals to plan tasks/activities, some of which will involve very strict deadlines. You can log information such as date, timings and locations of the people who are involved.

Diaries can also help staff to know the whereabouts of their colleagues and when they are available to speak to. For example if you answer a call for a colleague but are not sure where they are, you could refer to the staff diary to locate this information (as long as this is accurate and up to date).

There are various types of manual diaries that are available; these vary from a large, page-a-day type to a smaller version with up to a week on view on each two pages. You need the size that will enable you to write clear information on the tasks you need to do and/or the appointments under each date. Manual diaries are often used for personal appointments and are individual to each person. Other people that may use these are secretaries or PAs.

Nowadays electronic or computerised diaries are used much more in companies, especially those that book a large amount of appointments, e.g. hospitals, dentists, garages, electrical and gas companies etc.

One of the most frequently used electronic diary programs in business is Microsoft Outlook, because it is compatible with other Microsoft Office software, such as Word. Outlook can be used to maintain your diary, organise and manage lists of tasks you have to do, and keep an address book of your contacts. You can use it as an e-mail software program and also use it to check the schedules of other people in your team; this is useful to book team meetings. Some companies also purchase PDAs for their staff, these offer many usable features including functions such as a “to do” list, address book, a calculator, a reminder option and a memo pad. They are compatible with the PC so that information can be downloaded easily.