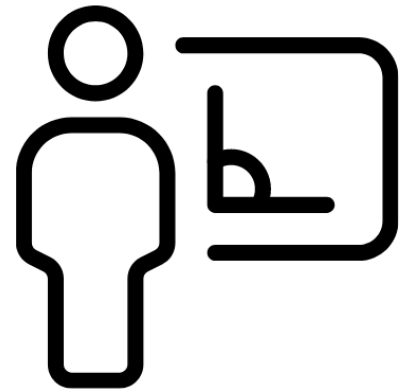# Instructors Guide

On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor for each lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.

Sample Module: Why Your Office Needs Administrative Procedures

Administrative procedures are more than mundane policies. They are put in place to ensure the survival of the company in any event or situation. From catastrophes, to change, to basic day-to-day activities, administrative office procedures address them all when they are done correctly. Business continuity, succession planning, audit requirements, and recovery planning are all included in administrative procedures.

Business Continuity

Business continuity is also known as business continuance. It is the plan in place to keep a company running in the event of a disaster; during and after. Establishing business continuity requires identifying essential tasks first. This includes items and services that are critical for the organization to function. These will vary by organization but they include technology, employee safety, sound structure, etc.

Business Continuity Steps:

- Determine risks that the company could face (weather, IT, sabotage, etc.).

- Analyze the effects of each risk or hazard that you discover on different aspects of the company (safety, functions, assets, etc.). Determine how long your company could function if one of these risks came to pass and what recovery would require.

- Develop a team and strategy to address the potential problems.

- Develop a plan and document each step before sharing it with the rest of the team.

- Test the plan using different methods such as drills, walkthroughs, and checklists.

Estimated Time	7 minutes

Topic Objective	Introduce business continuity.
Topic Summary	**Business Continuity** Consider business continuity.
Materials Required	**Worksheet 1 - Business Continuity**
Planning Checklist	None
Recommended Activity	Complete the worksheet individually. Share your answers with the rest of the class.
Stories to Share	Share any personal or relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	What is an essential task?

Succession Planning

Successful succession planning develops a pool of talent so that there are more than enough qualified candidates to fill vacancies in leadership. This strategy requires recruiting qualified talent, creating a talent pool, and instilling loyalty in employees.

- **Identify goals and objectives:** Common goals include profitability, employee loyalty, service, and productivity.

- **Identify needs in the company:** Consider changes in the responsibilities of different positions the company develops.

- **Recognize trends in the workforce:** Understand the changes occurring within and without your organization, such as an aging workforce.

- **Develop the employee pool:** Determine where to find employees to fill in the gaps (within, recruiting drives, social media, etc.), and develop a plan to engage them once they are chosen.

Estimated Time	10 minutes
Topic Objective	Problem solving.
Topic Summary	**Problem Solving**

	Explore creative problem solving.
Materials Required	**Worksheet 2 - Succession Planning**
Planning Checklist	None
Recommended Activity	Complete the worksheet individually. Share your answers with the rest of the class.
Stories to Share	Share any personal relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	Define succession planning.

Internal and External Audit Requirements

 Both internal and external audits are important for identifying risks that organizations face. The internal audit addresses how effective and reliable administrative controls are. An internal audit also addresses record accuracy, legal compliance, and management action. Internal audits and external audits are similar, but the internal auditor is an employee of the company that they audit. The external auditor is not an employee, and they will create a report based on the finances, operations, and compliance of companies. Both internal and external auditors provide recommendations based on their assessments.

The auditor, whether internal or external, is required to be independent and objective, qualified, provide adequate testing, provide adequate documentation and action, offer verification and review, and give a report that will be reviewed by relevant parties, such as the board of directors.

Estimated Time	**7 minutes**
Topic Objective	Introduce internal and external audit requirements.
Topic Summary	**Internal and External Audit Requirements** Consider the importance of imagination and inspiration to the creative process.
Materials Required	**Flipchart/board and marker**
Planning Checklist	None

Recommended Activity	Discuss your experiences with internal and external audits. Consider the pros and cons of each, and list these on the flipchart/board.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	What do audits identify?

Recovery Planning

Recovery planning goes hand-in-hand with business continuity. Recovery planning, or disaster recovery planning, is the process that is put in place to recover data, software, hardware, and manpower that the company needs to start back up after a disaster.

Recovery Planning Steps:

- Identify critical systems and prioritize them, and identify potential risks.

- Determine strategies for data, technology, suppliers, people, and facilities.

- Create a plan with step-by-step instructions based on the strategies discovered.

- Test the recovery plan and make adjustments as necessary.

Estimated Time	**7 minutes**
Topic Objective	Introduce recovery plans.
Topic Summary	**Recovery Planning** Discuss recovery plans.
Materials Required	**Worksheet 3 - Recovery Plan**
Planning Checklist	None
Recommended Activity	Complete the worksheet individually. Share your answers with the rest of the class.
Stories to Share	Share any personal, relevant stories.

Delivery Tips	Encourage everyone to participate.
Review Questions	What does a recovery plan relate to?

Practical Illustration

Sharon worked at the same company for 26 years. She was coming close to retirement and asked her supervisor if her help was needed training her replacement. She was surprised to learn that no one was in the running for her position, and she retired in a month. Her supervisor explained that they were having trouble finding someone qualified to replace her.

Module Two: Review Questions

1.) Business continuity is also called _____.

    a)   Business strength
    b)   Business continuance
    c)   Business conformity
    d)   Business combination

Business continuity is also called business continuance. It keeps a company going in the event of a disaster.

2.) What is not an example of a risk?

    a)   Weather
    b)   IT
    c)   Sabotage
    d)   Functions

Functions need to be analyzed in business continuity, but they are not risks. The other answers are.

3.) What are profitability, employee loyalty, service, and productivity?

    a)   Goals
    b)   Needs
    c)   Trends
    d)   All of the above

It is important to determine goals in succession planning. Goals are profitability, employee loyalty, service, and productivity.

4.) An aging workforce is an example of a _____.

    a)   Need
    b)   Goal
    c)   Trend
    d)   None of the above

Trends are factors that influence the needs of succession planning. An aging workforce is an example of a trend.

5.) Which type of auditor works for the company being audited?

   a) External
   b) Internal
   c) Both
   d) Neither

Internal auditors work for the company being audited. External auditors do not work directly for the company being audited.

6.) What is Not required of an auditor?

   a) Objectivity
   b) Independence
   c) Reports
   d) Leadership skills

Auditors must be objective and qualified, provide adequate testing, provide adequate documentation and action, offer verification and review, and give a report that will be reviewed by relevant parties. Leadership skills are not required.

7.) What is the first step in recovery planning?

   a) Identify critical systems
   b) Create instructions
   c) Test the recovery plan
   d) Create a plan

All of the answers are necessary in recovery planning. The first step is to identify critical systems.

8.) What is the last step in recovery planning?

   a) Identify critical systems
   b) Create instructions
   c) Test the recovery plan
   d) Create a plan

All of the answers are necessary in recovery planning. The last step is to test the recovery plan.

9.) Administrative procedures are important because_____.

    a) The company's survival depends on them
    b) The employees' retirement plans depend on them
    c) Changes within the company can't take place without them
    d) None of the above

Administrative procedures are more than mundane policies. They are put in place to ensure the survival of the company in any event or situation

10.) Which of the following is a risk a company could face?

    a) Weather
   b) Sabotage
    c) IT
    d) All of the above

Risks that the company could face (weather, IT, sabotage, etc.).

PowerPoint Slides

Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide. PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.
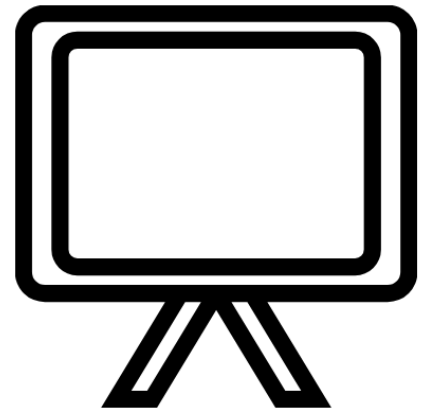
> "You can't do today's job with yesterday's methods and be in business tomorrow.
>
> Anonymous

Why Your Office Needs Administrative Procedures

From catastrophes, to change, to basic day-to-day activities, administrative office procedures address them all when they are done correctly.

Business Continuity

- Develop a team and strategy to address the potential problems.

- Develop a plan and document each step before sharing it with the rest of the team.

- Test the plan using different methods such as drills, walkthroughs, and checklists.

Succession Planning

- Identify goals and objectives

- Identify needs in the company

Internal and External Audit Requirements

Internal and external audits are important for identifying risks that organizations face.

Internal and external auditors provide recommendations based on their assessments.

Recovery Planning

- Identify critical systems and prioritize them

- Determine strategies for data, technology, suppliers, people, and facilities

Practical Illustration

- Business Continuity
- Succession Planning
- Internal and External Audit Requirements
- Recovery Planning

Module Two: Review Questions

1. Business continuity is also called _____.

A. Business Strength

B. Business continuance

C. Business conformity

D. Business combination

Quick Reference Sheets

Below is an example of our Quick Reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date.

They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.

Administrative Office Procedures
Quick Reference Sheet

Use a Template to Stay Consistent

Consistency can be difficult to attain when you are moving from one thing to another. Implementing the use of a template will develop consistency between procedures. There are different templates available, but you can also create your own template and tailor it to the needs of your organization.

What to Include in a template:

- Department: The department that the procedure falls under
- Category: The division that the procedure falls under (Accounting, HR, etc.)
- Job: The job title of the individual who typically performs the procedure
- Purpose: The reason for the procedure's implementation
- Statement: The policy statement outlines the actions and behavior required using the active voice.
- Regulations: List any laws or regulations to which the policy applies
- Related information: List any guidelines, policies, or procedures related to the new policy.

You may also need to include keywords, definitions, or background information, depending on the scope and complexity of your procedures.

Allow Office Personnel to Express Improvements/Updates if needed.

Never underestimate the importance of feedback. The people who use the guide are the best ones to listen to when it comes to making improvements and updating the information. Do not simply wait for people to share their views. Provide employees with different opportunities to communicate with you. For example:

- Discuss the binder at weekly meetings.
- Provide surveys.
- Bring it up in one-on-ones.

Depending on the organization of the company, you may choose to allow employees to update the binder on their own.
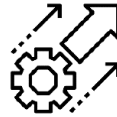
Effective Time Management

Every organization can benefit from effective time management. When documenting procedures, it is important to include time management strategies.

Strategies:
- Stay organized: Organize the workspace so that you do not waste time looking for things.
- Prioritize tasks: Complete important tasks before the unimportant ones.
- Stop procrastinating: Identify procrastination and avoid it.
- Make a schedule: Stick to it
- Delegate: Give others the responsibilities that do not require your attention.
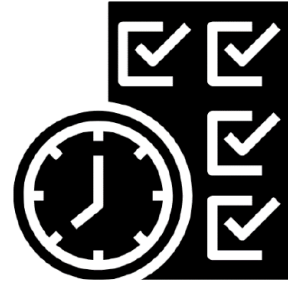
Binders should include tools with the strategies to help manage time. Tools that binders may include are schedules, time sheets, checklists, and estimated timing per task to help employees keep track of their work and make adjustments as necessary.
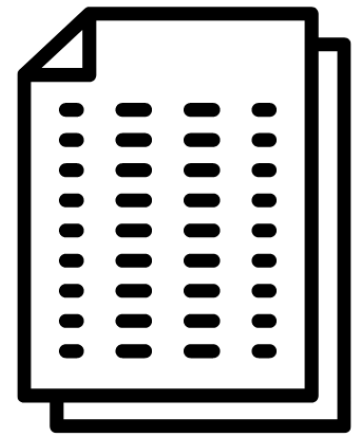
Handouts

Each course is provided with a wide range of worksheets. Worksheets help check your participants' understanding. If a lesson calls for a worksheet, it will be listed in the Lesson Plan box under Materials Required. All worksheets are customizable and can be found in the Appendix of the Instructor Guide and the Training Manual.

As a trainer, icebreakers give your participants the opportunity to get to know each other better or simply begin the training session on a positive note. Icebreakers promote collaboration, increase engagement, and make your training more light-hearted and fun. Below is an example from the Icebreakers folder.

Sample Worksheet 1

Business Continuity

Identify the threats that would disrupt your business continuity.

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Sample Worksheet 2

Succession Planning

Answer each question related to succession planning.

1. What are the long-term goals of your company?

   _____

   _____

   _____

2. How will these goals alter responsibilities and positions in the company?

   _____

   _____

   _____

3. What trends does your company face?

   _____

   _____

   _____

   _____

Sample Worksheet 3

Recovery Plan

In the space, make a list of essential systems for your organization.

_____

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Icebreaker: Getting Engaged

PURPOSE

This activity will help the group to get to know one another, and to connect to each other by working on a common goal that they can refer to throughout the workshop.

MATERIALS REQUIRED

1. Flip chart paper for each group

2. Markers for each group

3. Masking tape, non-marking adhesive, or push pins (depending on the room, to hang the flip chart paper)

**TIME REQUIRED**

20 minutes

ACTIVITY

Have everyone introduce themselves by stating their name, where they are working, how long they have been in their current role, and one thing that they love about the work they do.

Form the group into smaller teams of four to six people. Each group must come up with the name, logo, and motto (if time allows) for their newly formed *company*. They can capture the information on flip chart paper, and then hang them around the room for the day. As the workshop progresses, encourage them to write key words, phrases, or parking lot items on their sheets.

Certificate of Completion

Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.
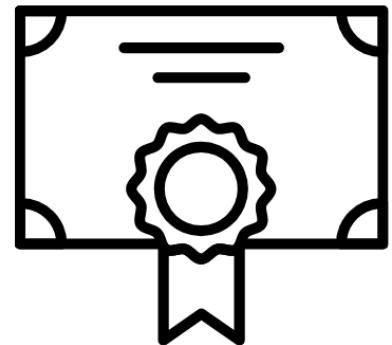
CERTIFICATE OF COMPLETION

[Name]

Has mastered the course

Administrative Office Procedures

Awarded this _____ day of _____ e _____, 20 _____

_____

Presenter Name and Title