Certified Courses

Professional Certificate

The Office Professional and Records Management Masterclass

INTRODUCTION

- The Office Professional and Records Management Masterclass is an exciting and interactive training course, designed to provide participants with the opportunity to review and develop interpersonal and professional skills needed to do their jobs effectively, thereby contributing to personal and organizational success.
- After exploring and developing the multi-faceted skills required of the office professionals and administrative staff (including both inter-personal and technical skills), the combination allows participants to explore in more detail the issues involved in meeting responsibilities for managing documentation and records.
- This training course also covers the strategies, tools and technologies used to capture, categorise, manage, store, preserve (archive) and deliver documents and records in support of business processes, as well as the core components of ISO 15489 so that organisations become compliant with best practices.

PROGRAMME OBJECTIVES

- Extend their understanding of their roles as office managers and administrators and the key contribution they make to organisational success
- Review and develop their personal organisation, communication and interpersonal skills
- Review their working relationships
- Develop an action plan to help themselves, their boss and other colleagues 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 in their organisations
- Determine how document and records management can be implemented across their organisations
- 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 in their organisations

WHO SHOULD ATTEND?

- This unique 10-day training course will be beneficial to all those who want to build on their office management, administration skills and knowledge and are interested in understanding document and records management best practices and how it can be implemented successfully

TRAINING METHODOLOGY

- This highly interactive training course provides participants with an opportunity to exchange views and learn from each other's experiences. Participants will learn by active participation during the training course through the use of a wide variety of instructional techniques.
- There will be group exercises and a range of case studies to present "best practices" approach. In addition there will be in depth discussion of critical success factors.

PROGRAMME SUMMARY

- Days 1 to 5 of the The Office Professional and Records Management Masterclass training course cover a wide range of interrelated topics critical to the effectiveness of office personnel and administrative staff in meeting their roles and maximising their contribution to their teams and organisations. Emphasis is placed on building on existing good practice and on recognising areas where improvements can be made and developing strategies accordingly. Emphasis is also placed on managing the network of relationships and inter-personal skills and communication.
- Days 6 to 10 of the The Office Professional and Records Management Masterclass training course covers all the essential skills needed to understand, use and apply document and records management and all the essential skills needed to understand, use and apply ISO 15489 records management standard. Discussions focus on the use of best practice, processes and systems implementation as well as how to apply all the key concepts. Emphasis is also placed on participants developing action plans to implement document and records management successfully in their organisations and other initiatives following from the training course.

PROGRAM OUTLINE

Programme Introduction / Roles, Competences and Personal Effectiveness

- Programme introduction and objectives
- Action planning
- The 'competence' model of skills, behaviours and values
- Emotional and Chronistic Intelligence
- Personal competence review
- Time management constraints – resources, systems, other people and self
- Handling requests and conflicting priorities

Team Working, Communication and Meetings Team working and team roles

- Team working and team roles
- Briefing skills – giving, receiving and passing on
- Organising and participating in meetings
- Notes, minutes and follow-up

Managing Working Relationships / Communication Skills/Supervising Admin Staff

- Delegation – giving and receiving
- Coaching and training colleagues and staff – skills of on-job training
- Communication and listening skills – lessons from NLP
- Building rapport
- Developing a network of working relationships – influencing skills
- Assertiveness and conflict
- People problems and problem people
- Helping others perform – case study
- Practical motivation
- Criticism skills

Managing Time / Desk Management and 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 organisation
- Writing and designing presentation slides

Managing Information & Budgets / Improving Customer Service and Systems

- 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 and systems – continuous improvement
- Action planning

Strategy and understanding key elements of Documents & Records Management Compliance

- 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 and Delivery

- Information gathering: audit and survey
- Building a business case
- 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 programme planning

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Case Studies

- Introduction to Case Studies
- Group 1 – Strategy: Developing a business case
- Group 2 – Concepts: Training and awareness programme
- Group 3 – Process: Developing policy and standards

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