

The iam Certificate in Administrative Management Study Guide

Unit One: Inside Organisations

Unit Two: Working With People

Unit Three: Administrative Practice

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iam Certificate in Administrative Management

Introduction

Welcome to the Certificate in Administrative Management.

This award is made by the Institute of Administrative Management, a 90 year old professional Institute dedicated to the promotion of the science of Administrative Management, with members across the globe, at all levels of management and in all commercial sectors including business, manufacturing, government, education and training.

This Study Guide provides indicators and a framework for your personal study. It enables you to reflect on, and to evaluate, the context within which organisational decisions must be made.

When registering to commence the Certificate programme, the student is entitled to join the Institute as an Associate Member, benefit from all the privileges of membership, and progress to further study with the **iam**.

iam Qualifications

Progression

Candidates who have completed the Certificate in Administrative Management can proceed to the Diploma, and then the Advanced Diploma in the same subject or alternatively may be accepted to proceed to the second year of a relevant university degree programme.

At this stage, candidates can proceed to the Bachelor of Arts (Honours) degree in Strategic Administrative Management, awarded in collaboration with Oxford Brookes University Business School. This programme enables students to “top up” their **iam** professional programme to a full British university undergraduate degree.

Bachelor of Arts (Honours) Degree in Strategic Administrative Management
It is necessary to complete one preparatory Unit, and the Advanced Diploma, before proceeding to this programme. It is specifically planned to provide a stimulating, rigorous and challenging academic experience, which is designed to complement prior learning with the **iam**. The course is also intended to provide a range of skills including knowledge and application of techniques of strategic management and administration. The course develops transferable skills and

encourages students to adopt an independent and reflective approach to their learning.

Progression

On completion of the Bachelor of Arts (Honours) degree in Strategic Administrative Management candidates can progress into senior management positions and may wish to further their studies by completing a Masters Degree programme.

For further information about the Institute’s qualifications, please visit the **iam**’s website www.instam.org, or contact Customer Services on 020 7091 2600.

How the Certificate Study Guide works

There are features of the Certificate Study Guide you need to be aware of before you begin and these are:

1. It is intended to be completed by you at your own pace, wherever and whenever you wish, subject to Accredited Centres’ own requirements.

2. Whilst it is mostly self contained some additional reading may be needed. You will find a list of references/learning and recommended reading at the end of each unit.
3. Each Section indicates sources for further reading, and the internet is a rich information resource. Recommendations for further reading are included for those students who wish to develop their competence more widely.
4. Each of the units in the programme begins with an overview followed by a list of learning objectives. These describe the skills and knowledge that you should gain from working through the unit.
5. As you work through each unit you will find sections covering key areas of the unit. As you work through each section you will find activities to do, to underline your understanding of the subject matter.
6. At the end of each section there is a section summary followed by learning activities. The learning activities aim to reemphasise the main issues outlined in the key areas of the section and give you practice in using the skills or knowledge you have gained, or get you to think about the implications of the topics covered.
7. At the end of each completed unit you will find details on how the unit will be assessed, along with a list of learning resources.

You are now ready to commence your studies. The Chairman of the **iam**'s Council, the Chief Examiner and all of the staff of the Institute wish you the very best of luck in your studies and hope that you will find the programme an interesting, fulfilling and career enhancing experience!

Unit 1: Inside Organisations

Learning Outcomes

On completion of this Unit, the successful candidate will be able to:

1. Describe an organisation in terms of its purpose, objectives, structure, culture and systems.
2. Explain the rôle of a manager in achieving the organisation's goals, and the importance of effective support.
3. Understand the concept of workflow and of efficiency and effectiveness in relation to administrative performance.

1. Understanding your organisation

1.1 What is an organisation?

'Organisation' means the efficient and effective planning and structuring of events or ideas. The Pocket Oxford Dictionary defines it as our efforts "to give orderly structure", "to systematise" or "to bring into working order".

Business organisations (including non-commercial organisations) are goal-oriented social systems, ie they are collections of people, working together in a co-ordinated way, to achieve a common aim.

Each business organisation is different in its purpose and goals, described by:

1.1.1 Mission

Organisations need a clear and concise statement of their purpose and direction before they can start to plan their activities. A good Mission Statement reflects the priorities and ambitions of the organisation. It should:

- Clarify the reasons it exists;
- State what is most important to it;
- Be visionary and long-lasting.

1.1.2 Aims and objectives

The goals of an organisation can be divided into aims and objectives, to guide decisions about, for example, financial and human resource requirements, marketing activities, and the best use of resources.

Corporate aims are sometimes referred to as *strategic* as they take a long-term view. They need to take into consideration both

- present and future competition, and
- the strengths and capabilities of the organisation.

Objectives are smaller steps needed to reach long-term goals, given appropriate resources and time-frames. They must be specific and measurable – you must

know when you have achieved them, or what still needs to be done. Objectives should be SMART:

- **S**pecific
- **M**easurable
- **A**chievable
- **R**esourced
- **T**ime-bounded

Exercise

Investigate the Mission, Aims and Objectives of your organisation:

How do the mission and corporate aims affect your personal objectives or activities?

Are your personal objectives SMART? How do you know when you achieve them?

How does Administration as a whole contribute to achieving the organisation's overall aims?

1.1.3 Forms of ownership

Business organisations adopt different forms of *financial* and *legal* ownership, appropriate to their scale and aims:

- Sole trader (self-employed)
- Partnership
- Co-operative (democratic ownership)
- Private Limited Company
- Public Limited Company
- Public Sector

1.1.4 Organisational stakeholders

Stakeholders are individuals and parties who have a vested interest in, or are affected by, the activities of the organisation. The organisation needs to meet their expectations as far as possible. They include:

- The Owner, Shareholders
- Bankers and other lenders
- Employees (including managers)
- Suppliers
- Customers, Members
- Local community

1.1.5 The role of profit

Profit is the surplus of all income over all expenditure. It is important because it:

- rewards investors (in return for the risks they take)
- pays wage bills
- pays for product development, and
- enables reinvestment in future growth.

Not all organisations have a commercial purpose. Some are classified as Nor-For-Profit. These include:

- Charitable Trusts
- Professional Bodies
- Clubs and Societies
- Trades Unions

However, every organisation needs to be run efficiently and effectively, so as to leave as large a surplus of income over expenditure as possible, which can then be used to achieve its main purpose.

Exercise

What are the main differences between a Public Limited Company (PLC) and a Public Sector organisation?

Check the **iam's** website: <http://www.instam.org/?p=poi> What type of organisation is it? What is its stated purpose? What role does profit play?

What form of organisation do you work in? How is it owned?

1.2. The growing organisation

1.2.1 Size and complexity

Organisations start small and simple, and have little formal structure. The work may be shared amongst family members or co-owners. Some organisations plan to stay small, because they:

- Rely on very specific, expert skills that may be in short supply
- Provide a very specialised product or service with a limited (niche) market
- Need to manage risk carefully
- Support the chosen life-style of the owner

Organisations may also fail to grow because of the caution or lack of vision of the owners, or because the range of products or services offered is very limited. But

enterprising organisations, which have a growing demand for their product or service are able to expand by investing in more labour (skills, knowledge, experience) or more technology, (e.g. IT, CAD/CAM systems), or both.

Organisations gradually become more *complex* and challenging to manage because:

- the number of different divisions and departments grows
- the number of branches or production plants grows (geographical distribution)
- the number of layers of management (to co-ordinate the expansion and increased workload) grows.

1.2.2 Organisational structure

The larger the organisation, the more employees tend to take on *specialist roles*, and the more important is administration in supporting the flow of information around the organisation.

Specialisation:

- develops expertise, confidence and competent performance,
- makes relevant and cost-effective training possible.

Structure emerges by dividing and sub-dividing horizontally (into departments) and vertically (into levels of management). Eventually a *hierarchy* of roles and relationships is established. Key concepts in understanding structure are:

- *hierarchy* – vertical separation into a number of levels, reflecting responsibility and status
- *organisation chart* – a map of the roles and relationships within the organisation
- *span of control* – the number of subordinates for whom each manager is responsible
-

Structure is more than a system of bureaucratic roles and procedures. It exists to enable the product or service that its *customers* expect to be provided as effectively as possible – in the right place, at the right time, and the right price. It should:

- enable resources and activities to be utilised efficiently
- provide opportunities for monitoring the organisation's performance
- ensure the efficient flow of information and communication around the organisation
- create job satisfaction and staff loyalty by providing opportunities for career progression
- change and adapt to changing circumstances

For further information, visit:

http://en.wikipedia.org/wiki/Organisation#Organization_in_management_and_or_ganizational_studies

1.3 Organisational culture

Culture describes the *informal* organisation – the way it actually works in practice. Some would say, “the way we do things around here”. It helps to influence and control behaviour.

The type of organisational culture will also reflect the *national culture* in which it exists. The way of working within multinational organisations may vary from

country to country, or it may adopt the dominant culture of the organisation's home country.

1.3.1 Identifying culture

We can understand the culture of an organisation by looking at the:

- basic assumptions and *beliefs*, taken-for-granted views of reality, eg the trustworthiness of people, tolerance of disagreement
 - core *values* which express what is important and why, eg what gets rewarded and why, which stakeholder interests are prioritised
 - *norms* which define expectations of appropriate behaviour, eg time-keeping, style of dress
 - *artefacts* – observable symbols and practices which give clues about values and beliefs, eg names used, style of dress, exclusive or shared physical space
- Charles Handy identifies 4 main types of culture:
- *Power Culture* – values and norms imposed by a central power source (often the owner)
 - *Role Culture* – values and norms imposed by those at the top of the hierarchy (with no influence by subordinate employees)
 - *Task Culture* – team-oriented, shared values; norms of behaviour dominated by the requirements of the task or project
 - *Person Culture* – shared aims, but autonomy valued and individualistic practices tolerated

When planning to introduce *improvement* and more radical *change*, the culture of the organisation will influence what is acceptable and how it should be approached.

1.3.2 Dominant culture

Where there is consistency in the way of working across the whole organisation, there is said to be a *dominant* culture, eg the whole organisation could be described as *customer-focused* or *employee-centred*. This reflects the dominant beliefs, values and norms, reflected in the cultural artefacts. Some examples include:

- *Macho* culture – dominated by traditional (tough, competitive) male values
- *Bureaucratic* culture – dominated by rules and standard procedures to the exclusion of individual initiative
- *Team* culture – dominated by co-operation and mutual support;
- Culture of *Diversity* – dominated by valuing difference, tolerance and respect for others

Exercise

How would you describe the culture of your organisation as a whole? What factors influence it?

Are there differences between creative activities such as Marketing or Product Development, and procedural activities such as Finance?

Where there are differences between different functional departments or different geographical regions, these are referred to as sub-cultures.

1.3.3 Bureaucracy

Bureaucracy refers to the system of rules and procedures governing the internal running of the organisation, and is often connected with administration. It is 'a way of working' arising from a hierarchical structure.

Bureaucracy is often associated with a *control-oriented* organisation, with:

- rigid rules and procedures which can be applied without question
- clearly defined and regulated channels of communication
- specified roles for each individual within the organisation.

Excessive rules and procedures, often referred to as 'red tape', take energy and resources away from the main purpose of the organisation, and add more costs than benefits. They slow the flow of information and frustrate customers and employees.

As the workforce becomes better trained and educated, the organisation is able to allow them to make more of the day-to-day decisions using *guidelines* rather than rules, and using *initiative* rather than instructions. Such employees are said to be *empowered*. The need for control and co-ordination needs to be balanced with the benefits of developing trust and initiative within the organisation.

Exercise

Within your own role, to what extent are you able to use your own initiative in the interests of providing an excellent service?

To what extent is trust able to replace supervision in professional administration?

2. Managing the organisation

As organisations grow, activities need to be shared and delegated. Distinctions are often made on the basis of the expertise and responsibilities, eg Marketing Manager, Finance Manager, or Administrative Manager, as well as levels of seniority, eg supervisors, junior managers, middle managers, senior managers.

Good managers need to be more than skilled operators. Their role is to organise and motivate their subordinates:

to achieve the organisation's objectives through the efforts of others as effectively as possible.

Key concepts in management are:

- *Authority* – the legitimate power to decide and to delegate that authority to others
- *Responsibility* – the obligation to perform certain functions on behalf of the organisation.

2.1 What managers do?

The **iam** states that: "Management is ... a transferable skill across a range of specialisms." (<http://www.instam.org/?p=prd>) This consists of competencies

which can only be learned through practice and experience, informed by study, discussion, and reflection.

Managers spend the majority of their time in planning, co-ordinating, monitoring, and motivating others, rather than getting involved in day-to-day operations. To make the necessary decisions, they need to gather information, consult with others, and check that their decisions are having the intended results. As a result, they spend a large proportion of their time communicating:

- attending and chairing meetings
- engaging in face-to-face discussions
- contacting others by email or telephone
- reading and writing reports.

What a particular manager does on a daily basis will depend on the:

- *organisation* – its culture, structure, size, customers
- *job specification* – the scope of the rôle, level of authority, agreed responsibilities
- *role set* – the strengths, weaknesses and support of boss, colleagues, subordinates
- *individual* – her/his personality, style, priorities, preferences.

In moving from expert operator to manager, new competences need to be developed in order to get the best out of subordinates, such as delegation, monitoring, coaching, and leadership.

Exercise

Ask your own manager or team leader what activities occupy most of their time, and see how it compares with the factors discussed above.

How does it differ from the activities that occupy most of your time?

2.2 Management skills

Managers help to achieve the organisation's goals *through the efforts of others*. An important part of their rôle is therefore to form good relations with those who provide that essential support. (See *Part 2: Working with People*) But there are other skills which are particularly associated with becoming a good manager.

2.2.1 Delegating

Delegation is "a power-sharing process in which individual managers transfer part of their legitimate authority to a subordinate". According to Mullins, delegating involves:

- clarifying objectives
- agreeing terms of reference
- checking acceptance of authority and responsibility
- providing guidance and training
- setting clear deadlines, check points and performance standards
- allowing freedom to act within agreed boundaries.

Delegation provides many benefits:

- managers cope better with their workload and focus on their core activities
- learning opportunities are provided for staff
- employees are challenged and increase their skills and experience

- organisations can better cope with staff turnover and succession planning.

2.2.2 Monitoring

Managers remain responsible for the quality and quantity of work delegated by their staff. They save no time or effort if they continually 'watch over the shoulder' of subordinates, but they must still inform themselves about performance, both task and person related.

Interventions may be needed if performance targets are not being met, by making changes to:

- the terms of reference, deadlines, reducing the *demands* on the subordinate, or
- training, resourcing, supporting, encouraging, increasing the *capacity* of the subordinate.

Monitoring is an important aspect of control. It provides the manager with information about the performance and capability of staff, and progress towards achieving targets and objectives. This enables the manager to provide accurate feedback, leading to improved performance. However, excessive monitoring implies a lack of trust and confidence in the subordinate, and that will undermine their confidence and increase stress.

Coaching

Coaching is a way of developing the skills and confidence of those who work for a manager, by sharing experience and advice, agreeing on-the-job learning goals, and providing feedback *to improve performance* and bring about change.

Feedback should be positive, not critical:

- Forward, not backward, looking – towards solutions, not blame;
- Performance, not personality/individual, focus;
- Develop confidence, not fear;
- Generate gradual but sustainable improvements.

Coaching can be a 'win-win' process, with many benefits for the employee, the manager, and the organisation as a whole.

Exercise

Think about your relationship with your own manager or supervisor, and identify examples of each skill – delegating, monitoring, coaching – and how they help you to improve your own performance.

How can you develop these skills in your supervision of junior employees or trainees?

2.3 Leadership

Leadership is *the process of influencing the behaviour or attitudes of others, of getting the best out of people, individually and collectively*. Anita Roddick, founder of The Body Shop, described leadership as "*creating a vision to which others can aspire and energising them to work towards that vision*".

All employees can develop vital leadership qualities such as:

- vision and imagination – sharing ideas, making novel suggestions;
- enthusiasm and commitment – being proactive, self-motivated

- respect – building expertise, interpersonal and networking skills;
- self-awareness and sensitivity to others.

2.3.1 Leadership styles

Views of management and leadership have changed over the decades:

- Early 1900s – a military model based on *command and control*;
- 1930s – recognition of a range of styles, from *authoritarian* to *democratic*;
- 1970s – recognition of the importance of the situation, and need for an *appropriate* style;
- 2000s – recognition of the importance of *teamwork and participation*;
- involvement, sharing, and coping with the pace of change (getting the best out of people by supporting and encouraging them).

A successful leader has to choose an approach that suits both the situation and those who are being led. Some leaders have a preferred approach, but there needs to be a balance between

- a *task-centred* approach, eg focus on deadlines, keeping within budget, and
- a *people-centred* approach, eg focus on support, encouragement and learning.

A task-centred approach delivers short-term benefits, eg meeting targets; a people-centred approach gives longer-term benefits, eg increasing satisfaction and morale.

2.3.2 Support roles

Managers adopt different personal styles according to their individual characteristics and skills, and the culture of the organisation. But they need to

understand their subordinates if they are to gain their respect and commitment. It is essential that support staff share the same values and objectives as the organisation and its managers, and work in a co-operative way.

Followers are those responsible for supporting a leader and helping him/her achieve their goals. As leaders, managers need the support of:

- supervisors
- administrators
- personal secretaries
- technical professionals.

The qualities of a good 'follower' will be addressed in Part 2: Working with People.

2.4 Ethical and social responsibility

While managers' performance is frequently judged on the financial contribution that they make to the organisation (eg a Cost Centre approach), there are other ways of contributing value in the eyes of stakeholders, even though they may be harder to measure precisely.

The European Union defines corporate social responsibility as: "*a concept whereby companies decide voluntarily to contribute to a better society and a cleaner environment*". This can include both remedial and positive actions:

- energy (heat and light) conservation

- transport for both products and employees
- waste disposal and paper recycling
- ambient chemicals
- supporting volunteering or charities
- sponsoring local community projects.

Ethical management relates to the values held by the organisation in relation to *how* profit is made, the *use* to which it is put, and the wider *impact* of the organisation's activities. Ethical values and policies can be put into practice in several ways, eg

- respect for copyright
- equal opportunity for women
- sourcing of raw materials
- respect for cultural diversity
- product testing on animals.

Ethical behaviour on the part of managers and employees can benefit the organisation through creating *goodwill* and a *positive image* with its customers, employees, suppliers, the local community, and the media.

Exercise

Does your organisation's Mission Statement refer to its ethical or social values? What actions does it take to show that it is aware of its 'corporate social responsibilities'?

3. A systems view of the organisation

3.1 Basic systems concepts

An organisation is made up of units which rely upon and impact each other, referred to as a 'system': "*a complex whole; set of connected things or parts ... arranged to work together.*" (Pocket Oxford Dictionary)

3.1.1 The system as a whole

Any business organisation exists within a wider commercial and political environment. It is open to external influences and has also has a reciprocal impact on the wider community and economy. Such organisations are known as *open systems* (to distinguish them from other self-sufficient *closed* systems). Systems which must continually adapt to their environment in response to *feedback*, whether it relates to workflow performance standards, the capabilities of suppliers, or the demands of customers, are known as *dynamic*. Administration is an example of a *dynamic* system – one which is continually adapting (improving) itself in response to changing demands and feedback.

The components of the system are not independent. Understanding the relationship between different processes is important to understanding the service required of administration.

3.1.2 Systems components

In its most basic form, a system comprises 4 main components:

- *Inputs* – the basic resources (raw materials, finance, skill, information)

- *Processes* – which manipulate and transform inputs, into
- *Outputs* – the results desired by the customer (which can be another unit within the organisation), and
- *Feedback* – information and observation used to correct or improve processes.

Complex systems can be divided into *sub-systems*, where the output of one becomes the input of another. Sub-systems can run in *parallel*, or form part of a *sequence*.

3.1.2 System boundaries

The system boundary is where it *connects* with the surrounding environment. It is where information is transferred from/to its environment. Boundaries also exist between each sub-system. The relationship between sub-systems needs to be understood, particularly where *dependencies* are involved.

Administration is often responsible for communication across boundaries to ensure they do not become *barriers* to smooth workflow, and for advising where boundaries can most usefully be set (defined) between sub-systems so as to avoid *bottlenecks*.

3.1.3 System performance

The performance of a system can be defined in two ways:

- *efficiency* – a measure of output (product) / measure of input (consumption), and
- *effectiveness* – a measure of the extent to which a system achieves its *goals*.

Administrative systems pride themselves in improving efficiency, leading to cost savings in the short term. However, it must also contribute to improving organisational effectiveness in the longer term. This can be far more difficult to 'measure', but indicators of improvement in effectiveness might include:

- more rapid information flow
- better decisions
- fewer customer complaints, or
- lower turnover of administrative staff.

For an introduction to Systems, visit <http://en.wikipedia.org/wiki/Systems>

Exercise

Can you describe your own administrative activities using basic systems concepts?

3.2 The administrative system

The term 'office system' is sometimes used to refer simply to the computer system (eg "the system is down"). IT is a sub-system within the wider

information and communication system. The technical system co-exists with the human system to support the functions and processes that provide the core products and services to customers.

The administrative system is referred to as a socio-technical system because it brings together both technical and human components, with the aim of co-

ordinating the resources and processes that are needed for the smooth running of the organisation.

3.2.1 Administrative inputs and outputs

Every business process in an organisation has its inputs, procedures, and outputs. The inputs are the resources that must be in place before the procedures can take place. Procedures transform and add value to these resources, in order to achieve the desired output.

Resources (inputs) essential to administration include:

- raw materials
- buildings
- technology
- finance
- training
- knowledge and experience
- information.

End-results (outputs) of good administration include:

- product or service
- customer satisfaction
- goodwill, reputation
- learning
- profit (or surplus)
- information.

Outputs also include unintended or undesirable by-products, such as waste disposal and environmental pollution.

Exercise

Investigate the outputs of your own office activities, and identify as many environmental impacts as possible. (You might want to refer back to section 2.4 first.)

3.2.2 Administrative processes

Administrative processes are the procedures that convert resources into results which are of *value* to the organisation, its customers and other stakeholders.

They include such fundamental activities as:

- operating equipment, eg answering the telephone, using appropriate office software
- maintaining records, eg taking written messages, diary management, following document and file naming rules
- assuring quality, eg proofreading documents, handling customer complaints
- applying knowledge and skill, eg using initiative, team working.

The whole administrative system can include activities and services provided by other departments or organisations, known as *outsourcing*.

3.2.3 Workflow

Linking processes together produces *workflow*. At its simplest, it is the progress of documents and tasks through a work process. It is concerned with the operational aspect of work: how [tasks](#) are designed, who performs them, in what

order, how they are synchronized, how [information](#) flows to support the tasks, and how tasks are tracked.

Smooth workflow depends on:

- appropriate *inputs* – resources, information, training, space – of the right quality, in the right quantity, at the right time and in the right place;
- appropriate *procedures* – planning, techniques, skills, motivation – to turn the inputs into something of value to the customer.
-

However, processes and procedures are carried out, with or without the aid of technology, by *people*. People not only make up the organisation, but they introduce the improvements in tasks and procedures needed to maintain its competitiveness. The next Part will examine the role of people in the organisation more closely.

Exercise

Produce a simple flow diagram showing your position within a workflow process.

Where do your inputs come from? Where do your outputs go? Are there any bottlenecks in workflow? If so, what causes them, and what are the effects on your performance?

Unit Summary

Now that you have completed this Unit, you will be familiar with much of the language that is used to describe and analyse organisations and their management, and how they relate to administration. You should try to use those terms appropriately when making log entries and writing reflective summaries.

The Learning Activities identified should enable you to *apply* your knowledge and to *reflect* on why and how things are done the way they are. Later in the programme, you will examine how you can *improve* administrative procedures and your own contribution to meeting the organisation's goals. Record these activities in your Learning Log, together with learning you have achieved during your day-to-day activities, adding your own thoughts and feelings in a constructively critical way. This will form the basis of your learning to become a Reflective Practitioner.

Unit 2: Working with People

Learning Outcomes

On completion of this Unit, the successful candidate will be able to:

1. Explain the purpose of jobs and the importance of motivation and satisfaction in relation to administrative rôles.
2. Identify the causes of change in an office environment and propose techniques for minimising employee resistance and stress.
3. Understand the importance of teams in the workplace and the factors involved in successful team working.

1. Work, jobs and people

Work is the *effort* required to achieve objectives. It is not necessarily paid (e.g. housework, homework, voluntary work) though it is usually rewarded in some way.

In organisations, work is structured into *jobs* for individual employees. Their effort is made more productive by the skills and knowledge they bring to the job, and the *tools and resources* provided to assist them.

1.1 The purpose of jobs

Jobs only exist to enable the organisation to achieve its aims and objectives. In order to 'add value', each job should contribute more benefits than costs. Jobs that do not do this will always be under threat. In large organisations, jobs are often quite specialised, but in smaller organisations, a single employee may be responsible for a range of activities or processes. This is known as *multi-tasking*.

An individual job can be broken down into roles and responsibilities, activities and tasks. The more senior the position in the organisation, the greater the responsibilities and range of activities that the job will involve. The *job specification* should clearly state the purpose of each job, and who it is responsible to, not merely the tasks to be undertaken.

Exercise

What is the purpose of your job? Why are you important to the organisation?

1.1.1 The nature of administrative work

The Institute of Administrative Management defines the function of 'administration' as:

'the effective and efficient development, implementation and management of the organisation's systems and resources to achieve goals and objectives'.

The overall purpose of administration is to provide a *service* to the whole organisation – whenever key business processes require support, whether in liaising with suppliers, safe-guarding resources, maintaining records, or providing customer service.

Administration is vital to an organisation's control, co-ordination and communication requirements. Its function is to ensure the *efficient and effective operation* of activities such as:

- Human Resources – hiring, training, rewarding and firing employees;
- Communication – meetings, email, newsletters, website, marketing promotion;
- Facilities – property, energy, space, security, maintenance;
- Finance – borrowing, budgeting, maintaining accounts.

1.1.2 The impact of technology

Professional administrators have always used tools to improve their performance. Information technologies such as the typewriter, the photocopier, and the fax machine all proved vital in speeding up the production and distribution of paper-based information.

The arrival of desktop computing has had a more profound impact than previous technologies, allowing much of the capture, processing and communication of information to be carried out *electronically*.

Because the keyboard has been the main input device in desktop computing systems, those with typing skills have been able to adapt to word processing technology quickly. However, *new skills* have become necessary:

- using the system *securely* to safeguard the organisation's resources, e.g. following login and logout procedures correctly, taking regular backups;
- using the system *efficiently* to save time and effort, e.g. familiarity with shortcuts, use of macros;
- using the system to achieve goals more *effectively* – exploiting any new features that the hardware or software offers, becoming more responsive to customers.

As well as ensuring smooth workflow around the organisation, professional administrators are involved in setting up and improving systems and procedures for handling information and safeguarding resources, e.g. producing guidelines for new staff, backing up files, and undertaking risk assessments.

Exercise

List the ways in which technology has affected the processes and tasks which you are involved in on a day-to-day basis. Have these impacts been positive or negative?

1.2 Designing jobs

Each job needs to make a positive contribution to achieving the organisation's objectives, fitting together as a jigsaw, to enable work to flow as smoothly and rapidly as possibly.

Any job, from the most junior assistant to the most senior manager, can be compared and described using criteria such as:

- *specialisation* – is it broad-based (generalist) or highly specialised?
- *communication* – which channels and are media used, and with whom?
- *discretion* – is the job mainly rule-following (low discretion) to initiative-oriented?
- *variety* – is the range of tasks and responsibilities narrow or very varied?
- *time-cycle* – how repetitive are the activities? How often do any routines recur?

The responsibility for designing jobs rests with managers, but they are implemented day-to-day by supervisors and team leaders. Increasingly, organisations are encouraging employees to make suggestions as to how their jobs could be improved.

1.2.1 Motivating employees

Motivation is what drives us to action, whether that comes from values and beliefs, goals, or incentives. The impetus comes from needs which have not yet

been met. Work can help meet those needs, beginning with basic needs for survival and security. Once these needs are being met, and they no longer motivate us, we are driven by 'higher level' needs such as:

- for social interaction, esteem, status

- for personal challenge and achievement.

For further information, visit:

Getting the best out of employees requires that they are motivated to put *effort* into their tasks, either because they are well-rewarded, or because they find them interesting or worthwhile, or both. This depends on *individual* circumstances and changes with age, financial responsibilities, learning and aspiration. But through work, a wide range of needs can be met, and a manager is able to influence many of these factors directly, particularly in creating work that is moderately demanding and varied, recognised as valuable, and appropriately rewarded.

1.2.2 Creating satisfying work

People enjoy work as long as their job meets their individual needs and expectations. It is generally accepted that people who find their work satisfying are more *productive* and more *loyal* to the organisation.

Aspects of work that are taken for granted, such as pay, conditions (holiday, working hours), space and equipment, do not in themselves create satisfying work. But if they are inadequate, they may lead to *dissatisfaction*.

Work is felt to be satisfying if it meets higher level needs, e.g. challenge, responsibility, and recognition. People experience greater satisfaction if:

- they understand their importance to the team, the department, and the organisation
- they feel valued for the contribution they are making
- their responsibilities match their skills, knowledge and confidence.

A 'good job' will be different for every individual. However, it will always be one which meets the employee's needs. For that reason, managers need to understand what motivates their individual employees as well as what tasks need to be done, in order to obtain a good match.

For a useful introduction to the subject of motivation at work, visit:

http://www.bizhelp24.com/personal_development/motivation_theory_importance.shtml

Exercise

What is your ideal job? How far does your current job meet your needs and aspirations? What could you do to increase your sense of satisfaction at work?

1.3 The role of the supervisor

Supervisors and team leaders are a vital *link* between management and the work force. They have a direct influence on the performance of employees – and getting the best out of them. Becoming a good leader (see Unit 1, section 2.3) is fundamental to the role of the supervisor or team leader.

Since this is the first rung on the management ladder, supervisors need to develop a wide range of *new skills*:

- Planning work, setting targets, allocating tasks and resources;
- Identifying training needs and providing on-the-job training;
- Motivating and encouraging staff, developing co-operation and teamwork;

- Monitoring behaviour and disciplining if necessary;
- Monitoring quality standards and providing feedback;
- Introducing improvements in processes and performance.

1.3.1 Allocating tasks

The supervisor is responsible for workflow planning and allocating tasks to the most appropriate member of the team or department. This requires a systematic approach, e.g. the BALM model:

- **B**reak down the broader team goals into specific, individual tasks. List all tasks, and then rank each task in terms of importance;
- **A**nalyze and list the competencies required to perform each task;
- **L**ist the competencies of each team member;
- **M**atch individuals to task competencies.

The supervisor must also consider the needs of the employee as well as of the task. Repeated tasks may reduce mistakes, but they are also a source of boredom, loss of concentration, fatigue, and eventually reduced performance. Tasks need to contribute to satisfying work which motivates employees and develops their skills and capabilities.

1.3.2 Monitoring performance

The purpose of monitoring is to ensure that tasks are being performed efficiently to agreed quality standards on an ongoing basis. The supervisor is responsible for:

- setting clear SMART objectives
- defining performance standards
- monitoring costs (time, finance)
- checking output (quality standards, response time, customer satisfaction)
- appraising employee performance, recommending reward.

1.3.3 Providing feedback

Providing feedback is essential to the supervisor's rôle as it provides the information on which good performance can be sustained and weak performance improved. Feedback should:

- be prompt, closely following the event
- be specific about why something was good or not up to standard;
- focus on the work, not the person
- give clear information about how it can be improved
- contain encouragement and focus on future performance
- not focus on too many different aspects at the same time.

Feedback should not be reserved for when things go wrong. Positive feedback reinforces and encourages good performance, and is a powerful motivator. Formal employee appraisal can provide the basis of performance-related reward systems, or generate a personal development plan.

For further information on employee appraisal, visit:

http://www.bizhelp24.com/personal_development/employee_appraisal.shtml

2. Dealing with change

2.1 The causes of change

The business world is changing rapidly and at an accelerating pace. This has forced organisations to pay particular attention to the threat of competitors and the needs of customers, and this has had an impact on administrative processes.

Change drivers are factors, whether threats or opportunities, to which the organisation must respond if it is to survive, such as:

- competition
- innovation
- technology
- globalisation
- legislation.

The resulting changes have had a significant impact on administrative jobs, particularly changes in technology, such as

- less paper-handling
- more information processing
- faster communication
- new skills.

2.1.1 Office automation

Early attempts to introduce technology on a large scale into the office, such as telephone switchboards and typing or word processing pools, were based on

'mass production' approaches to work. Originally designed by F W Taylor for the industrial workplace, it was assumed to be appropriate for an 'automated' office environment.

The *objectives* were to

- eliminate waste and error
- minimise cost
- increase productivity
- standardise and routinise.
-

The outcomes were repetitive, monotonous, boring work, leading to absenteeism, stress, high labour turnover. This approach has persisted in many Call Centre environments. Technology has the potential to remove skills or to increase skills depending on how it is used and managed. For that reason, 'automation' is no longer in common use when referring to the application of technology in the office, and objectives for administration are no longer seen purely in terms of labour (and cost) savings.

2.1.2 Linking the supply chain

In providing a service that supports the operations of the whole organisation, effective communication is vital to administration. This extends beyond the walls of the business itself to include suppliers, customers, and those providing external services – the whole *supply chain*.

The supply chain is the series of processes (and process providers) that begins with purchasing raw materials (*procurement*) and ends with delivery to customers and after-sales service (*fulfilment*). The supply chain relies on administration to provide the information and communication support that is essential to co-ordinating the activities and relationships of the supply chain, e.g. raw material specification, customer requirements, dispatch and delivery progress, and billing.

Supply Chain Management systems are able to achieve efficiency savings and strategic benefits which would not be possible without technology. However, they rely very much on human communication to hold the *partners* in the chain together:

- building relationships of trust and co-operation,
- sharing and discussion of information,
- ensuring a win-win outcome for everyone, especially end-consumers.

Exercise

Draw an outline diagram of the 'supply chain' for one of your organisation's key products or services. How is communication maintained between the different links in the chain?

Interpersonal communication

Disruption to social relationships is not often considered when changes to the structure of an organisation are planned. And yet good relationships at work have a positive impact on job satisfaction and productivity. Technological change also

has an impact on social relationships, often reducing the amount of face-to-face communication. Negative impacts include:

- Communication with customers is so intense that little time is available for communication with colleagues (as in a Call Centre environment)
- Communication is mainly electronic (email, computer conferences) rather than face-to-face
- Meetings (with opportunity for informal interaction) are replaced by strings of emails or strictly timed videoconferences.

It can also be argued that technology can have a positive impact on human interaction:

- More frequent interaction is possible regardless of location (email, mobile phones)
- People may feel less inhibited in putting forward suggestions in a computer conference than in a face-to-face meeting
- Virtual teams (linked only by technology) can operate globally, extending the network of social contacts.

2.1.3 Management choice

A comparison of 'office automation' and 'supply chain management' shows that the impact of technology on administrative work depends on the values that managers place on *technology* compared with *people* when designing jobs and allocating resources. Technology can reduce or increase social interaction, depending on how it is used. The results can be:

- *Computer-controlled work*: Where jobs are designed around what the *technology* itself can do, employees are often reduced to machine-minders, removing the need for high level human skills such as thinking and adapting. Some skills are transferred to software designers and computer engineers. When technology under-uses an individual's capabilities, it *deskills* them.
- *Computer-assisted work*: Where jobs are designed around *human* capability, technology can free users from being mere data processors, allowing them to develop new, technology-related skills. Technology also allows users to focus on their *cognitive skills* such as analyzing, problem solving, and decision-making, rather than operational skills.

2.2 Responses to change

Change occurs every day in every aspect of our lives, and we accept it or even enjoy it. However, change involves not only accepting something new, but losing something familiar, leading to a period of grieving. Different individuals will miss different things. It could involve:

- loss of *self-esteem* – role, skills, status
- loss of *relationships* – support, social contact, isolation
- loss of '*comfort zone*' – familiar routines, convenience, job security

2.2.1 Resistance

Resistance is anything acting against the change, whether to *block* it or to *slow* it down. If the reasons for resisting change are stronger than the reasons in favour of the change, it will not happen. Where change is essential to the success of the organisation, resistance needs to be reduced and if possible prevented.

Those affected by change judge its likely impacts according to their *personal interests*. If they believe that change will benefit them, it will be welcomed. But if they believe it is against their interests, or they have yet to be persuaded that it is in their interests, they will resist change.

A major problem is that change always brings *uncertainty* and that can produce anxiety and even fear:

- fear of the unknown – this is often made worse by lack of information and discussion; many people fear that over which they have no control.
- fear of failure – this is often related to low self-esteem, of not being able to cope or of losing 'face'; many have lost confidence in their ability to learn, highlighting the need for regular training and professional development.
-

In the early days of office technology, there was concern about 'technofear' and 'cyberphobia', assuming that it was the technology itself that users could not come to terms with. However, people resent change which is 'done to them', over which they have no influence, and where the outcomes are uncertain.

Resistance is more likely if change is not properly *managed*, e.g.

- users are not involved (or are involved too late) in decisions
- job design, motivation and morale implications are not considered
- there is no reward or recognition for new responsibilities or skills
- training is related to requirements of technology rather than users.

2.2.2 Stress

Change has an impact on our 'comfort zone'. It is always stressful to some extent, if only because the future is never totally knowable, and we can never be certain that we have the skills and knowledge to be able to cope.

Stress is the result of *pressures* in excess of an individual's ability to cope with them. IT can be a stressor for employees if:

- they are not consulted or informed (fear of the unknown)
- job content is changed (fear of failure)
- design of the workstation is inappropriate
- there is a lack of understanding of the capabilities *and limitations* of IT
- social relationships are affected (loss of support).

Pressures come not only from organisation-wide restructuring or new technology or lack of training, but also from home and social life. Some energy will be

diverted away from efficient performance and towards coping with change itself. How disruptive stress is will depend on the *support* available and individual's *coping* strategies.

Exercise

Identify one change in your life that you welcomed, and another that you resisted or that you found to be stressful? What seemed to make the difference in your reactions to each situation?

2.3 Planning and implementing change

Organisations are complex. Because of the interdependencies between the business environment, the organisation, its people and supporting technologies; any change in one aspect will affect one or more of the others.

Cultural change is the most important consideration. About 80% of the effort and resources required for successful IT-related change are – or should be – deployed on the 'soft' aspects of business change, such as changing behaviours and providing training at the right time; only 20% is required for the IT.

(<http://www.oqc.gov.uk/sdtoolkit/deliveryteam/briefings/businesschange/management/change.html>)

2.3.1 Project management

The principles of project management can be helpful in planning change, where it is a single *event*. People will always have more *confidence* in change if they can see that it is well planned, and broken down into responsibilities, and tasks with clear milestones. Key skills include:

- Communicating to goals of the project clearly
- Estimating time and other resources accurately
- Familiarity with planning tools, such as Gantt Charts
- Winning support for your projects.

Confidence in change will diminish sharply if the project is badly managed. You can only start to estimate time accurately when you have a detailed list of all the tasks that you must achieve. When you have this, you can make your best guess at how long each task will take to complete. Planning needs to allow for:

- staff holidays and sickness
- equipment breakdowns
- unforeseen interruptions and emergencies
- consultation meetings
- liaising with others outside the project
- resistance to change.

For further suggestions, visit:

http://www.mindtools.com/pages/article/newPPM_00.htm

2.3.2 Preventing resistance

Resistance is frequently against the way in which the change is introduced, rather than the need for change. Negative reactions to change can be avoided by sensitive management of any change:

- *Communication* – providing information about the *need* to change, not just the change itself

- *Consultation* – asking employees directly affected for their views and preferred solutions
- *Participation* – involving employee representatives in the planning and implementing process
- *Training* – begin well in advance of the change, to increase confidence and reduce the fear of failure
- *Support* – listen to concerns and make allowances for reduced productivity during the transition phase.

Encouraging staff to question current practice and continually seek to improve it is the best way of preventing them from becoming too comfortable in their 'zone'. Those who are used to small-scale, achievable change tend to build up a positive feeling about it, and do not get into a 'rut'. Especially if they have been informed and consulted about the need to change, they are likely to welcome it.

2.3.3 Managing stress

Stress is a concern because it affects performance and productivity. It is incompatible with 'getting the best out of people'. If stress is caused by pressures which exceed our ability to cope with them, there are two possible remedies: reduce the demands on an individual or increase their ability to cope with change.

Stress can be managed by:

- Participating in decisions about change and feeling some control of the change;
- Eliminating unnecessary tasks (and learning to say "no" to the non-urgent or unimportant)
- Checking that demands have not been over-estimated or abilities underestimated
- Allowing additional time for unfamiliar procedures and ensuring workload is allocated fairly
- Providing ample, early training
- Improving health and fitness.

While some of the responsibility for managing stress lies with individual employees, managers need to make sure that their unrealistic expectations, incompetence or poor management style are not causing stress. There is a range of measures which organisations can take to help employees cope with the stress of change:

- Stress prevention programmes, e.g. good job design, training in assertiveness or time management skills
- Stress reduction techniques, e.g. providing meditation or yoga classes, promoting positive thinking, encouraging physical exercise
- Stress coping strategies, e.g. setting up support groups, stress counselling.

3. Working in teams

A group is a collection of individuals with a common goal. A group is *cohesive* (bonds together) if its members:

- share common values and attitudes as well as objectives
- co-operate effectively (pool skills, knowledge and effort)
- work to keep the group together (show loyalty, resolve disagreements constructively)
- put the interests of the group before self-interest in relation to its objectives.

Groups are particularly useful for:

- generating ideas
- contributing different points of view
- sharing workload
- providing support

When a group is successfully working together co-operatively and productively, we use the terms 'team' and 'teamwork'. When not, the group may still exist in name, but ceases to be a team.

3.1 The importance of teamwork

Many processes are too large to be undertaken by a single individual, as they need a range of skills and experience beyond those of a single individual. In large organisations, administrative work is increasingly undertaken by teams of people with different skills and specialisms, to gain the similar benefits to multi-tasking, e.g.

- using skills and knowledge fully
- flexibility in response to changing demands
- increasing opportunities for learning and improvement.

3.1.1 Co-operation and support

Having good followers is vital to any team leader. According to Michael Argyle, team members need to behave appropriately both towards the leader, and towards other team members, if the team is to achieve its goals.

Rules for followers (towards the leader):

- show respect and offer support
- accept instructions and tasks willingly
- don't hesitate to query or seek clarification
- use initiative where possible
- contribute and defend own ideas
- be prepared to accept constructive criticism

Rules for followers (towards each other):

- show respect and offer support
- accept one's fair share of the work load
- be co-operative over shared physical environment
- be willing to help when requested
- work co-operatively despite feelings of personal dislike
- don't criticise another team member to the leader

3.1.2 Decision-making and problem-solving

Problems that are *difficult or complex* require a range of *ideas* and some creative thinking benefit from having a group to tackle them. This is especially true where the solution is a matter of judgement and/or gaining *acceptance* is important, since those who have been party to the suggestion are unlikely to reject it later. However, it assumes that there is enough *time* for consulting and discussing.

Teams are less efficient at making decisions where:

- the problem is simple or routine,
- a correct solution can be calculated (it could even be done by a computer),
- the solution is difficult to explain or requires consistent reasoning,
- disagreement is unlikely to be achieved as a result of discussion,
- the decision must be made urgently.

One technique that relies on teamwork for achieving creativity, rather than conformity, is *brainstorming*. It is good for generating novel solutions – but it not a decision-making technique itself. In order to be successful,

- It must be non-critical – no suggestion is too ridiculous, as it may trigger a further suggestion
- All ideas must belong to the group, and any solution which does emerge must also belong to the group as a whole.

Exercise

Choose one group or team of which you are a member. How are decisions made and by whom?

3.2 Building an effective team

It is part of the responsibility of the supervisor or team leader to support the building of a new team, or to help new members to integrate into an existing team.

3.2.1 The team-building process

Team-building is a process of members *learning* to work together as a team. To begin with there may be conflicting views, but through discussion and compromise, the group will eventually agree on a way to work together to complete their tasks and achieve their goal. Once achieved, the group may be disbanded, or may be given a new task.

The stages in the development of a team have been identified as:

- storming
- forming
- norming
- performing
- adjourning

3.2.2 Team working skills

To be an effective member of a team, members need to have not only *task-related* technical skills and expertise, but also *team-oriented* interpersonal skills.

Essential skills for team players are:

- *Listening* – to other people's ideas and suggestions courteously
- *Questioning* – challenge, interact, criticise constructively
- *Respecting* – treat others with respect, and value difference;
- *Helping* – support one's co-workers, behaving co-operatively
- *Sharing* – share knowledge and effort ;create team spirit
- *Participating* – teams should be inclusive, encouraging all members to participate.

3.2.3 Team roles

Teams need a mix of members – planners, doers, and supporters – with compatible strengths who respect each others' contributions. Every successful team needs at least one member who:

- is a good co-ordinator, setting goals and allocating tasks
- is able to provide expert knowledge and experience
- contributes ideas, imaginative in solving problems
- can turn ideas and decisions into action
- is able to stand back and evaluate options or progress objectively

- is energetic, thrives on pressure, challenges others
- communicates well and liaises with others outside the team
- is diplomatic and considerate, seeks to resolve any conflict
- is painstaking and conscientious, good at meeting deadlines.

For further information, visit: <http://www.belbin.com/belbin-team-roles.htm>

Exercise

What kind of team member are you? What role(s) do you tend to play, and what skills do you use?

3.3 Teamwork in administration

3.3.1 Meetings

Although normally thought of as a form of communication, meetings are also great examples of teamwork in action. They need an effective leader (the chairperson) and they need co-operative members all working towards the same goal (arriving at an agreed decision).

Meetings take up a lot of people's time and many complain that they are not sufficiently productive to warrant the investment in preparation and attendance. Worse still, such a negative perception perpetuated across a number of meetings can impact motivation and relationships. Yet a business meeting run well is an excellent opportunity to generate ideas, inform, persuade, consult, make decisions, build teams and enhance relationships.

For the group to make best use of its time together, an effective meeting must be well managed. This includes:

- *Preparation for the meeting* – who needs to attend, defining objectives and outcomes of a meeting, establishing if a meeting is the best forum for the task; setting the agenda, prioritising items
- *Chairing the meeting* – role and style of the chairing, setting the scene and establishing ground rules, keeping on track and to time, ensuring a balanced contribution from attendees, handling disagreements, negativity and disinterest, bringing meetings to a close
- *Running the meeting* – ensure that the objectives are achieved, gain clarity and commitment to actions, ice breakers, energisers and other interventions to build and maintain group energy and commitment, tools to aid creativity and decision-making
- *Documenting meetings* – how to layout meeting minutes, as well as record what has been discussed and agreed, using minutes creatively to review progress
- *Follow up and Evaluation* – how to monitor actions between meetings, communicating with those implicated in the information sharing and/or decisions who were not at the meeting, evaluating attendees' perception of the value of the meeting(s)

Exercise

Observe one formal business meeting and how it is run. How effective was the chairperson in managing the meeting according to these criteria?

3.3.2 Flexiwork

Flexible approaches to work can be a great motivator for employees who do not want to work full-time, or need flexibility because of personal circumstances. The challenge is to maintain teamwork and communication between team members even when individuals are working remotely for varying amounts of time. It covers a wide range of alternatives to a 9-5 day:

- *Flexitime* – where the organisation identifies 'core time' during which all employees should be present, but allows staff to decide whether to start early or finish late, for example.
- *Job sharing* – where a single job is shared by two people, allowing employees to work for half of each day, or for half of each week.
- *Teleworking* – where most work is done at a distance from the main site usually at home or 'on the move' (e.g. sales representatives).
- *Hot desking* – where some work is done at home but a hot desk is also allocated at work, which is shared with other workers who come into the office at different times.

Flexiwork can help the organisation to retain the skills and experience of those for whom a 9-5 job is no longer appropriate. It also gives varying degrees of control to employees, which helps to increase job satisfaction and to minimise stress levels.

It is made possible by information and communication technologies which allow for the rapid transfer of information (the most important element of a professional administrator's role) regardless of location. However, since ICTs are geared to exchanging hard information, rather than linking people, arrangements need to be made for employees to meet together periodically to reinforce team awareness and spirit.

Exercise

What types of administrative task are best suited different forms of flexiwork and telework?

3.3.3 Virtual teams

A 'virtual team' is a team which doesn't normally meet at all. It consists of members linked together electronically using ICT, especially the internet. This allows teams to be formed of members who are not able to meet together in traditional ways but whose expertise is important to a project. Work projects in *global* organisations can be completed by spreading the workload among long-distance players.

The means for supporting virtual teams will be studied in Unit 3 section 2.2.3 (Computer Mediated Communication).

3.3.4 Office design

One further element of the administrative environment that has a significant effect on teamwork and co-operation is the layout of physical space. There has been a trend towards open plan layout for a number of years, for reasons other

than economy and flexibility of space. The lack of physical barriers also helps to ensure a smooth flow of work.

Open plan design encourages a mentality of shared facilities and shared ideas, and prevents a 'bunker' mentality developing amongst staff resistant to change.

Open plan also tends to be associated with flatter management structures and more flexible working practices. It is much easier to build an effective team if members can move around, discuss informally, and meet regularly.

Ranks of workstations covering the whole floor of a building, under harsh overhead lighting, do not make for an attractive and inviting place to work. Space does need to be broken up – but not into personal bunkers. Sound-proofed glass walls can be used around areas for confidential meetings; low, moveable screens can be used to mark territory and provide some privacy, without forming barriers to effective communication.

The different kinds of work function – regular desk work, client meetings, training, brainstorming, researching, etc – require different kinds of space. And then there are the de-stressing and re-energising areas - for the café, the bar, table football, TV, gym – and the supportive spaces such as the crèche, counselling rooms etc. Space for these kinds of workplace-enhancing activities fully justify the reduction in inefficiently-used private offices.

(<http://www.flexibility.co.uk/flexwork/offices/environment.htm>)

Exercise

What recommendations would you suggest for changing the layout of your office with better workflow and teamwork in mind?

Unit Summary

Now that you have completed this Unit, you should be familiar with the purpose of jobs in the organisation, and how a combination of motivating and satisfying work and effective supervision can improve performance. You should understand 'change' from a human perspective so that you can implement it sensitively, and the rôle of teamwork in creating a successful organisation. You should be able to use these concepts appropriately when making log entries and writing reflective summaries.

The Learning Activities identified should enable you to *apply* your knowledge and to *reflect* on why and how things are done the way they are, as a basis for improvement.

Record these activities in your Learning Log, together with learning you have achieved during your day-to-day activities, adding your own thoughts and feelings in a constructively critical way. This will form the basis of your learning to become a Reflective Practitioner.

Unit 3: Administrative Practice

Learning Outcomes

On completion of this Unit, the successful candidate will be able to:

1. Identify the different users and uses of information in a work organisation and good practice in managing information resources.
2. Use information and communications technology to improve information flow and business communication processes.

3. Propose ways for improving the efficiency and effectiveness of administrative procedures and processes.

4. Managing information resources

Information has been described as “the lifeblood of the organisation”. It can take the form of words, numbers, diagrams or images (graphics). Without it, decision-making would be little more than guesswork, and communication with other areas of the organisation, and with suppliers and customers, would be little more than a social or public relations exercise.

Information is a unique resource. It is both an *input* to business processes and an *output* of them. It has value both as *feedback* to generate improvement, and in terms of the quality of the *decisions* that are based on it.

Unlike other resources, information never gets used up. It is continually being added to and up-dated, and can be rearranged to suit a wide range of purposes – solving problems, monitoring progress, answering queries, or attracting investors.

All administrative work is *information-intensive*. It involves:

- *receiving* information from outside the organisation, e.g. correspondence, orders, telephone calls;
- *assessing* it in relation to procedures and processes, e.g. who needs it and in what form;
- *storing* information securely for later retrieval, e.g. filing hard copy, inputting into a document management system;
- *providing* information in response to enquires from customers or decision-makers, e.g. answering telephone queries, responding to letter and emails, reporting.

Information management is:

“The effective production, storage, retrieval and dissemination of information... to support business objectives.” (Best, 1996)

4.1 Information in the organisation

4.1.1 What is information?

Information has many meanings. But within a business organisation, an information system (combining technical and human components) can be described in terms of different levels.

DIKW refers to data, information, knowledge, wisdom: an *information hierarchy* where each layer adds extra characteristics.

(<http://encyclopedia.thefreedictionary.com/DIKW>)

- *Data* (discreet, concrete facts) is the most basic level
- *Information* is the sense made of data in a particular context
- *Knowledge* adds *how* to use it
- *Wisdom* adds *when* to use it.

Information can also be described as *hard* (based on verifiable data, as in ‘hard facts’) or *soft* (based on past experience and intuition). Soft information is particularly useful when a problem is complex and reliable hard data is not available. However, *relevance* can be problematic, since no two situations are the same! A decision that worked out well in one context will not necessarily work in another.

Storing and sharing *hard* information has been made far easier by developments in ICTs, because it can be structured and manipulated by computer software such as spreadsheets (e.g. Microsoft Excel) and databases (e.g. Microsoft Access).

Sharing *soft* information, on the other hand, is more difficult as it is rarely written down and would be lost to the organisation when the employee left. Teamwork is particularly valuable as a way of sharing and using soft information.

4.1.2 Information users and uses

There is a wide range of users of the organisation's information. Most will be within the organisation or within its supply chain, but some outside (investors, researchers, students, journalists). Information provided by the organisation needs to be tailored to the needs of the user, e.g. Annual Report and Accounts, product information, press releases.

The information needs of internal users depend on their position in the organisational *hierarchy*:

- *Operations* require data to support the day-to-day running of the organisation and to control core business processes – administration provides the system of storing, accessing and distributing information as efficiently and effectively as possible.
- *Middle managers* need to analyse information and co-ordinate the activities of the organisation – administration supports the analysis and reporting processes.
- *Senior managers* need internal reports, external information about markets and competitors, and experiential knowledge (soft information) to make long-term, strategic decisions – administration supports the information gathering and interpretation process.

Exercise

Thinking about your own tasks and activities, list the types of information that you use, where it comes from, and the use that is later made of it. The more detailed your analysis, the more you can learn from it.

4.1.3 The quantity of information

Information is essential to making any decision. Too little information and a decision becomes a guess. However, the capacity of electronic storage and distribution means that lack of information is less of a problem. In fact, managers often complain that they receive too much information! Back in 1991, in an article

entitled 'Communications Revolution and its Impact on Managing Organisations Effectively', Dillman wrote that "companies which were once starved of information are now smothered in it".

Information overload is caused by:

- the increasing amount of information held on company databases,
- the increasing amount of information available on the internet,
- the increasing use of email.

At the same time, there has been no increase in the speed with which humans can absorb it. We now have to spend more time reading and assessing the information than in the past, leading to stress and reduced time for action.

(See <http://encyclopedia.thefreedictionary.com/Information+overload>)

It is increasingly important to know when you have *enough* information to deal with a query or make an *acceptable* decision. Spending time gathering more information, and then filtering it, takes time and money; and deadlines have to be met.

4.1.4 The quality of information

The *quality* of the information available is even more important than the quantity. All business processes and activities depend on 'good' information for planning, organising, controlling and measuring, communicating and motivating.

But what makes some information better (more useful, more valuable) than others? Users need to know how much confidence they can have in the information provided. Good information needs to meet as many of the following criteria as well as possible:

- reliable (trustworthy source)
- accurate (error-free)
- complete (up-to-date)
- relevant (to problem)
- unique (more valuable if competitors don't have it)
- convenient (accessibility, presentation)

Good quality information is necessary for good decision-making, but not sufficient! Good decisions require experience, understanding and creative thinking as well.

Exercise

What role can you play in making sure that the information you provide is 'high quality'?

4.2 Organising data and information

It has been argued that because digitised information takes no physical space and computer storage is now relatively cheap, organisations no longer need to be selective in what they keep. Others argue that there is little point in storing data that will not be used.

However, there are legal requirements to keep some records and documents for specified lengths of time. For example, Intrastat (trade statistics) and VAT records must be kept for at least 6 years.

4.2.1 Filing systems

All administrators are familiar with filing systems. The purpose of any filing system, beyond simple storage, is:

- security and safe-keeping (in secure, lockable cabinets)
- preservation (avoiding exposure to sunlight or flood)
- back-up and archiving
- rapid retrieval (efficient indexing systems).

Holding information on paper has both benefits and drawbacks:

- it is portable,
- it can be annotated,
- it can be sent to those without access to computing (e.g. some customers).

But

- individual sheets can be mislaid from within a file
- information can only be accessed by one user at a time
- paper deteriorates with use (gets torn, dog-eared)
- paper can be accidentally destroyed.

Most offices still maintain paper files in some form, if only because they cannot control the form in which information is received from outside the organisation. Some documents must, for legal reasons, be held in their original paper form. When disposed of, security and confidentiality should be maintained through the use of paper shredders. However, document management systems (which will be discussed in section 2.4) are beginning to reduce the need to hold paper documents, especially in larger organisations.

Exercise

Examine a paper-based filing system that you use regularly and check the speed with which information can be retrieved from it. Can you think of ways in which this could be speeded up or made more reliable?

4.2.2 Databases

A database is a collection of information organised in such a way that a computer program, e.g. Microsoft Access, can quickly select the required data for a user. Databases are organised into *fields*, *records*, and *files*. A field is a single piece of information; a record is one complete set of fields; and a file is a collection of records. For example, a telephone book is like a file. It contains a list of records, each of which consists of three fields: name, address, and telephone number. To access information from a database, you need a *database management system (DBMS)*. This is a collection of programs that enables you to enter, organise, and select data in a database.

(<http://www.webopedia.com/TERM/d/database.html>)

Common administrative applications of simple databases include:

- *Mail shot* (combining address and other individualised data with a standard letter);
- *Inventory* (recording stationery stock deliveries, volumes and withdrawals, enabling appropriate restocking to allow for rate of consumption, delivery time from suppliers);
- *Marketing* (recording customer details and purchases, identifying preferences for targeted marketing campaigns).

4.2.3 Data security and protection

Data security begins with confidentiality – not disclosing important or sensitive information to inappropriate people. In an administrative context, this involves ensuring that information is only read, heard, changed, broadcast and otherwise used by people who have the right to do so.

There are many risks against which information resources must be safeguarded. These include:

- theft (e.g. financial and identify fraud),
- hacking,
- industrial espionage,
- terrorism.

Information is particularly vulnerable when so much can be held digitally in a single location. Computer-based information can be safeguarded by encryption if

sufficiently valuable, but a vital part is played by training and good practice in relation to:

- security and access permissions;
- login and logout procedures, changing passwords regularly;
- regular backup of files, often kept off-site if information is sufficiently important.

Organisations are legally obliged, under UK *Data Protection* law, to:

- Process only as much information as they need,
- Keep their information accurate and up-to-date,
- Keep their information securely
- Delete information as soon as possible
- Observe the individual subject's rights.

Exercise

What steps do you take to ensure that the information you use is kept secure and confidential?

4.3 Retrieving online information

The *Internet* has brought a wealth of information to the computer screen from a wide range of sources, some of which is valuable to business. The search screen provides hypertext links with URLs (Unique Resource Locators, i.e. web addresses) to other 'pages' of information. Clicking on these links retrieves documents, images, sounds from individual servers around the world.

Much of the information is public and free, but parts of some sites are available to members or subscribers and can only be accessed by passwords (e.g. market analysis reports such as Mintel).

4.3.1 Information searching

Unlike traditional filing systems or reference books, there is no index to the content of the Internet! Where the web address or URL (Unique Resource Locator) is not already known, searching is by *keyword* – so choice of key words is important.

What you find depends on the keywords used when the information was originally sent to the *search engine*. A search engine is a computer program that searches documents for specified keywords and returns a list of the documents where the keywords were found. Examples of search engines are: Google, Yahoo and Alta Vista.

Good internet searching should be both *efficient* in its use of time, effort, cost (there is a charge for accessing some information) – and *effective* in achieving the goals of the search, i.e.:

- find relevant information more easily;
- tell the difference between useful information and low quality, unreliable information.

4.3.2 Evaluating information

All information from whatever source, but particularly from the internet, must be evaluated carefully. (Refer to Section 1.1.3)

Factors to be borne in mind when judging how 'good' internet content is include:

- Is it factual, or opinion?
- Is it original, or a summary of other sources?
- Is it accurate, or biased/sponsored?
- Is it verifiable, or does it have a reputable organisation or expert behind it?
- Is it up-to-date, and how often is the information updated?
- Does it provide links to other resources?
- Is the information well written and clearly presented?
-

Other factors to consider when evaluating a web site include its scope, user-friendliness, interactivity, and the audience it was intended for.

Exercise

Look critically at the information provided by your own organisation on the internet. How well does it match up with the criteria for good internet content? Are there any improvements that you could suggest?

5. Technology in administration

We commonly think of technology as the *tools* we use to achieve particular objectives. But as these tools have become more complex, they have little value without the appropriate *skills* to make the most efficient and effective use of them.

Different stakeholders, e.g. managers and users, expect different things of information technology when applied to administrative work. Possible benefits, depending on whose view you adopt, include:

- to speed up workflow
- to monitor performance
- to reduce labour costs
- to improve customer service
- to standardise quality
- to relieve repetition and monotony.

Some objectives are *strategic* (concerned with long-term competitiveness), some concerned with increasing *control*, and some concerned with *operational* benefits.

The range of technologies now available to support professional administrators is extensive. Three examples will be examined, but the same principles can be applied to any technology in use in the office:

5.1 Information technologies

Information technology is no longer 'new technology', but IT is continually evolving. And as technology develops, new applications become possible, which change the tasks undertaken by administrators. Examples include Intranets and Document Management Systems.

5.1.1 Intranets

Organisations increasingly use internet technology to develop an *intranet* – a private database of corporate information. Access can be restricted by password for particular groups, where sensitivity and confidentiality are concerned. A firewall around the intranet excludes unauthorised access.

Intranets are used to share information, and are now the fastest-growing segment of the Internet because they are much less expensive to build and manage than private networks. An *extranet* extends access to the corporate database to other stakeholders, such as parties in the supply chain.

5.1.2 Document management systems

Sometimes viewed as electronic filing systems, a document management system can digitise and store all the organisation's paper-based information. Document management systems generally include the following components:

- An optical scanner and OCR system to convert paper documents into an electronic form;
- A database system to index and organise stored documents;
- A search mechanism to quickly find specific documents.

With document management software, every order, receipt, invoice, fax, email, picture, diagram, presentation, can be stored electronically. The benefits include:

- no bulky filing cabinets
- no physical deterioration of paper
- no lost documents.

Document management systems are becoming more important as it becomes increasingly obvious that the paperless office is an ideal that may never be achieved. Instead, document management systems are able to create a system that can handle paper and electronic documents together. They help reinforce workflow processes throughout the supply chain, and provide data on the range of users accessing information.

Exercise

Choose one technology that is particularly useful to you in some aspect of information management, and list the benefits that it brings. Consider both efficiency and effectiveness issues.

5.2 Communication technologies

Communication is the process of transferring a *message* (information) from a *sender* to *receiver* via a *communication medium* (text, voice, graphics, body language). Technology provides *channels* to carry the message from sender to receiver. Communication technology is not new to the office. Telephone, telex, fax are all examples of technologies which we now take for granted.

The telephone is *voice-based* and allows communication between individuals in different locations, but who are available at the same time (*synchronous* communication). Conference calls allow more than two locations to be linked up.

Fax (facsimile transfer) is *paper-based* and allows communication between two locations independent of time. The receiver does not need to be present when the message is sent (*asynchronous* communication).

Both voice- and paper-based communication have moved into the digital era, and added *video* which enables visual contact – use of expression, gesture, and other aspects of body language which are important sources of feedback, e.g. video phones.

Information and Communication Technologies (ICTs) can:

- Speed up communication, information flow, and feedback
- Overcome problems of physical distance or incompatible availability (e.g. time zones)
- Widen opportunities for participation in discussion and decisions (e.g. global teams).

5.2.1 Email

Email is the technology that has had the widest impact on business communication. It has replaced the memo within the office, and is brief and often informal in style. However, this can sometimes become abrupt and misinterpreted if insufficient care is taken over the wording. Email can be a significant contributor to the manager's 'information overload' (see Unit 3, Section 1.1.3).

However, its popularity and rapid-growth are based on a range of benefits:

- It is high speed
- It is low cost, given that the computer will normally be on the desktop already
- It is text-based and provides a *written record* of the message,
- *Attachments* – tables, diagrams, photographs and video – can be sent with the message
- The same message can be sent to a number of people via a *distribution list*.

Email will be revisited when considering important ways in which administration can be improved, both in terms of efficiency and effectiveness.

5.2.2 Teleconferencing

Teleconferencing technologies allow meetings (i.e. discussions, problem solving, decision making) to be held without the need for the participants to meet together in the same place. However, because the discussion is 'live' (in *real time*), all participants have to be available at the same time. One low-cost option is to link up multiple telephones, but this loses many of the benefits of face-to-face meetings.

Videoconferencing is a screen-based approach to meetings and discussions. Originally it required parties to be based in specially designed studios, which limited its use because of the high costs, the need to book the studio in advance, and to keep the meeting brief. Increasingly organisations set up their own videoconferencing facility, and now that it is available on desktop computers using internet technologies, it has become a realistic alternative to physical meetings.

The main benefits of teleconferencing are:

- significant savings in travel costs
- significant savings in travel time (freeing time for productive activities)
- significant savings in meeting time (less time is devoted to social interaction)
- the meeting can be open to a wider range of participants.

5.2.3 Computer-mediated communication (CMC)

Computer-mediated communication (CMC) is the term used for any technology that aids communication between people in different locations (not computers 'talking' to other computers). CMC includes *groupware* (e.g. Lotus Notes) and *discussion groups* (e.g. Usenet).

Unlike e-mail, CMC software can structure a discussion according to topics and contributors. With e-mail, messages arrive chronologically and are only grouped if the user takes the time to put related messages into folders.

The benefits of CMC are:

- it allows discussion to take place over a period of time, allowing more time for research and reflection
- it allows wider participation in providing information and views, and in decision-making
- an automatic record is kept so that people can refer back to things that were discussed earlier
- it is less intimidating for more junior staff than being present in a meeting with superiors.

CMC systems provide opportunities for *group working* that would not otherwise exist. The fact that the group does not need to be available at the same time

allows members to fit their on-line discussions around their other commitments and responsibilities. Different work patterns can be supported whilst still maintaining a feeling of team work amongst participants. This is particularly important where members are distributed around the world and potentially in different time-zones.

Interpersonal communication is more than mere 'data exchange'. Whichever technology is used, we can lose important interpersonal elements of communication when any technology is put between the sender and the receiver, such as:

- loss of body language for emphasis or feedback
- loss of eye contact for influence, persuasion or intimacy
- loss of richness of meaning and understanding.

6. Improving administrative practice

Practice must be seen from two complementary points of view: *efficiency* in the use of resources, to leave the maximum surplus for investing in the organisation or rewarding its stakeholders; and *effectiveness* in ensuring the long-term growth and success of the organisation through satisfying customer requirements.

Implementing regular small improvements is less threatening to staff, and lowers the risk of resistance and stress. It costs less, is less risky, and ensures a culture of flexibility and continual change. Improvement comes from being:

- open to new ideas and techniques, including suggestions from colleagues,
- learning (whether from study, from others, from experience), and
- reflecting on practice as part of ongoing Continuing Professional Development.

In always seeking to introduce improvements to processes and procedures, administrators can learn from others by benchmarking: the process by which a company can make objective comparisons between its own performance and the best practice existing elsewhere.

They can learn from both global market leaders, whose good practice might be discussed publicly in the media, or other local organisations with similar problems. Updating can be through regularly reading sector magazines and professional journals, but particularly through networking by attending conferences or participation in local business forums and professional bodies.

6.1 Performance measures in administration

What aspects of performance are measured can reflect what the organisation sees as important and what it *values*. However, measuring performance is always easier where there are simple, discreet, quantifiable outputs. But the exact relationship between inputs and outputs is not always so straightforward. The danger is that trivial things are measured because they are easy to identify, rather than because they have a big impact on *efficiency*, and ultimately *effectiveness*. (See Unit 1, section 3.1.4).

Two important principles in measuring performance are:

- Measuring itself uses resources such as time and effort, and needs to produce results that provide *more benefits than costs*.
- The information gained must be used to identify *improvements* to be made and then assess the benefits from them.

6.1.1 Clerical performance measures

These might include:

- percentage of phone calls answered within 2 rings
- number of actions not completed on schedule
- percentage of errors in data input
- amount of waste paper.

6.1.2 Procurement/purchasing performance measures

These might include:

- length of time stock is held
- space used by stock for storage
- number of process hold-ups due to lack of stock
- proportion of rejected or incomplete deliveries.

6.1.3 Quality assurance measures

These might include:

- number of customer complaints
- time to respond to customer complaints
- number of changes to a letter or report before it is distributed
- number of errors detected by a supervisor, but not the operator.

6.1.4 Management performance measures

These might include:

- number of targets achieved or exceeded
- accuracy of planning estimates
- number of deadlines missed
- rate of employee turnover
- number of initiatives and improvements suggested by staff
- percentage of employees engaged in CPD.

For further suggestions, visit <http://www.orau.gov/pbm/sample/sample.html>

Exercise

Suggest a list of performance measures that could be used to assess your productivity and indicate how it could be improved.

6.2 Solving administrative problems

Every organisation has its own problems. It is the responsibility of everyone in the organisation to contribute to solving them, whether by contributing ideas, taking part in regular training, or discussing disagreements, compromising, and avoiding the disruption of conflict. Problems can often be prevented by employees being professional in all aspects of their work. Some problems are particularly difficult to solve if the individual or the organisation does not have full control of the causes.

6.2.1 Information overload

Many managers insist on receiving information because they like to be 'in the know'. Especially in organisations which are competitive, rather than co-operative, information is power! But the result is that far more information is stored than is actually needed, and then takes longer to scan and filter. This issue was first discussed earlier in this Unit (section 1.1.3).

Most managers identify the volume of *email messages* among their biggest problems. This is because:

- Misuse (or careless use) of distribution lists (messages sent on a 'for information' basis rather than a 'need to know' basis)
- Unsolicited commercial bulk email (spam)
- Time taken to scan and delete or read messages.

Although the technology is often blamed, it is the way it is used that causes the problems. The 'email problem' can only be solved if it is managed properly:

- limit the volume of email received by using filters
- limit the volume of email sent by avoiding the use of distribution lists or copying to individuals on a 'for information' basis
- be ruthless in maintaining the Inbox and deleting unimportant messages once read, and certainly once acted on
- avoid interruption by not remaining continuously logged in – set aside key points in the day for referring to email.

For *Tips for Mastering Email Overload*, visit:

<http://hbswk.hbs.edu/item.jhtml?id=4438&t=srobbins>

6.2.2 Poor communication

Occasionally communication tools fail, but the problem of poor communication often lies with the sender or receiver, rather than with the means of communication:

- the sender may not be clear about the purpose of the message or understand the needs of the receiver
- the sender may express or present the message poorly, or choose an inappropriate means of sending the message
- the receiver may fail to listen or read carefully, to confirm understanding, or to question and clarify
- the sender may fail to check that the message and any actions are understood.

Selection of the means of communication (*medium*) is particularly important now that there is a vast range to choose from: meeting face-to-face, telephone, fax, videoconference, letter, email.

Before choosing the most appropriate medium, the following factors should be considered:

- How urgent is the message
- Is a written record of the message, or a receipt, required
- Does it need to be personalised (or is the same message appropriate for a large number of receivers)
- Does it need to be discussed (2-way communication)
- How confidential or sensitive is the message?

Technology is particularly useful in increasing the *speed* of communication, the *distance* over which it can be sent, and the *volume* of information that can be made available. But this also means that a poor or wrong message can travel further, faster, with more extreme results, and this is particularly true of email.

Sending clear, professional email messages only to people who need to receive them makes it more likely they will be read. Many organisations now have explicit *policies* to prevent the misuse of email, e.g.:

- Never criticize anyone in email, and avoid technical debates. Use face-to-face meetings or 'phone calls instead.
- Be selective in who you send email to, and who you copy into emails.
- Observe some formality (business email is different from personal texting on mobile phones).
- Don't hesitate to review and revise important emails before sending.
- Remember that email is a public and permanent record.
(http://www.w-uh.com/articles/030308-tyranny_of_email.html)

For '10 Tips To Write Professional Email That Gets Noticed', visit:

<http://www.life-with-confidence.com/workconfidence-sending-email.html>

6.2.3 Low productivity

Productivity has been described as a culture in which everyone continually strives to make better use of all the available resources – it is an ongoing process to ensure the effort is effective and efficient. (http://www.scott-grant.co.uk/services/services_index.htm) When productivity is lower than that of competitors, the future of the organisation may be threatened.

Productivity is measured in terms of the amount of *output produced per unit input used*, e.g. output per person per day/hour, i.e. how well an organisation achieves planned output while minimising the resources it uses (see Unit 1, section 3.2.1). It can be measured at various levels – business, division, department, team, individual or equipment – as a basis for measuring performance and improvement.

In studying productivity levels, questions which need to be asked continually include:

- Are we using all the available resources?
- Can we use these resources more effectively and efficiently?
- Are we adding value to the cost of all these resources?
- How do we measure this?
- How do we continue to achieve productivity improvement?

Low productivity in administration can show itself as:

- inconsistent or poor quality
- excessive overtime
- untidy work areas
- equipment breakdowns

- process bottlenecks
- excessive stock levels
- high staff turnover.

These problems stem from factors under the control of *management* – poor workflow planning, poor job design, inadequate resources (staffing levels, finance, IT), poor training and support, poor leadership and motivation.

Techniques for improving administrative productivity (getting more or better output from the inputs used) include:

- establishing clear procedures, setting clear, measurable targets
- investing in training
- reducing duplication of effort, error and re-working
- making better use of space
- sharing information and improving workflow
- improving job design and satisfaction.

Exercise

Identify a sub-system or system boundary related to your rôle where improvements could be made to (a) efficiency, and (b) effectiveness of performance. (Refer back to Unit 1, Section 3.)

6.3 Taking a strategic view of administration

A 'strategic' view of the organisation and administration in particular, involves seeing beyond the day-to-day operations of the business. It means:

- taking a *long-term* perspective (thinking years and months ahead, not days and hours)
- looking at the organisation as *a whole* (a systems view)
- keeping ahead of the *competition* (not just reacting to it)
- planning administration with the *customer* in mind.

At the beginning of Unit 1, the importance of the organisation's Mission, aims and objectives was introduced. And in section 3, the organisation was considered from a systems perspective. However, we still need to take a closer look at competitors and customers.

6.3.1 Administration and competition

It is a mistake to see administration as part of a bureaucratic process, following rules and procedures that 'keep the organisation going'. Too much emphasis on the procedural level:

- encourages rule-following at the expense of using initiative and innovation
- reduces job satisfaction because staff lose sight of their importance to the whole organisation
- adds operational costs that are not matched by organisational benefits;
- focuses internally on running the organisation rather than externally on meeting customer expectations.

Administration needs to meet *effectiveness* criteria – contribution to the overall achievement of the organisation's strategic aims – and not only efficiency. Keeping costs to a minimum is important, but it must be balanced with maintaining the *quality of service* that the customer expects. The aim is to retain

existing customers over a long period of time, so that they do not switch to a competitor.

6.3.2 Administration and the customer

Being competitive means meeting customer needs and expectations better than competitors. While this is frequently viewed in terms of marketing and production (the quality, price and delivery of the product or service), customers' first contact

with the organisation is often through administration – the reception desk, the telephone query, or the presentation of a letter received.

Customer service can be measured in terms of *willingness to help*, *speed of response* to queries and complaints, and in terms of customer *satisfaction and loyalty*. The quality of the service provided needs to be seen in terms of the extent to which customer expectations are regularly met, and preferably exceeded. Only then can administration be seen to add value and contribute to long-term success.

6.4 Professionalism in administration

6.4.1 Being 'professional'

Professionalism implies taking personal responsibilities at work with the utmost seriousness, taking part in training and personal development in order to provide the highest standard of service. Professionalism is associated with:

- *personal* qualities such as integrity, loyalty, dependability, and diplomacy;
- *work-related* qualities such as maintaining confidentiality, concern for standards, and not bringing the employer or professional body into disrepute.

Many organisations have Codes of Conduct or Ethics which indicate appropriate behaviours of employees or members in their relationships with colleagues, clients and wider society, and include the possibility of disciplinary action in cases of professional misconduct.

Professionalism implies responsibilities as employees and as individuals, eg:

- develop a knowledge and understanding of the organisation
- promote the legitimate aims and objectives of their employer
- comply with the organisation's ethical policies concerning actions or behaviour at work
- strive to attain the highest personal standard of professional knowledge and competence
- keep abreast of developments in their areas of expertise.

Exercise

How might the concept of 'professionalism' influence your personal contribution to your organisation at a practical level?

6.4.2 Continuing Professional Development (CPD)

CPD is the process of constantly updating personal skills and knowledge. It forms a basis for learning from experience both at work and throughout life. Many organisations encourage CPD, because they value the continual learning, improvement and openness to change in their most valuable asset – their people.

The iam's own 5-stage model for CPD, for which all practising administrators are encouraged to register, is:

1. Undertake a personal SWOT Analysis
2. Develop a Personal Development Plan
3. Implement this plan
4. Review the outcomes
5. Undertake on going development.

Participating in CPD has many benefits for participants:

- Enhance your credibility
- Add Value to the service you offer
- Help grow and develop
- Improve your career prospects
- Create a more satisfying lifestyle

CPD is particularly important at times of change. The pace of change is increasing and many of us will change our job several times during our career. This means we will need to acquire new knowledge and skills on a regular basis. The iam's programme enables administrators to:

- become more flexible
- identify development opportunities
- manage change better
- develop and support life long learning

For further details, including how to register, visit the iam website:

<http://www.instam.org/?p=cpd>

Exercise

Conduct a personal SWOT (strengths, weaknesses, opportunities and threats) analysis and identify 3 training or learning objectives for the next 12 months.

Unit Summary

Now that you have completed this Unit, you should be familiar with the value of information to the organisation, why managing it is important, and how technology can help (or hinder) in relation to administrative processes. But most importantly, you will understand why and how administrative processes can be improved. You should be able to use these concepts appropriately when making log entries and writing reflective summaries.

The Learning Activities identified should enable you to *apply* your knowledge and to *reflect* on why and how things are done the way they are, as a basis for improvement.

Record these activities in your Learning Log, together with learning you have achieved during your day-to-day activities, adding your own thoughts and feelings in a constructively critical way. This will form the basis of your learning to become a Reflective Practitioner.