The Learning Company

How to Make an Office Manual for Your Company

This is a project in which you will prepare an office manual for a fictitious company that will include everything you can think of that you would do on a daily basis in your job.

- Plan to use a binder (1-inch or larger) or a duo-tang folder. When this project is finished, it will likely have many pages, so you should wait until the end to choose what kind of binder you will use. (If you have not yet taken Bookkeeping, you will be able to reuse the binder in that subject.)

- Decide on the kind of business that you will have—for example, a medical office, a car rental office, a car dealership, an accounting office, etc.—and base your development of this manual on that kind of business. Choose the kind of business that you are most familiar with.

- Make a title page that identifies the book as an Office Manual and also shows your name and course.

- Prepare a Mission Statement and a Vision Statement. Not all businesses have mission/vision statements, but your office manual should have one. Search the internet for sample mission statements or go to corporate web sites and look at theirs. Your mission/vision statements should be memorable, honest and attainable.

- Create a hierarchy/organizational chart. Who are the executives? Who answers to whom? You may use names of real people or imaginary people, but you must have a name and title for every position on the hierarchy chart. Also, YOU must be one of the people named in the hierarchy.

- Think about what is important enough to put into your manual. You should start by compiling a list of contact phone/fax/cell numbers that would be used on a daily basis. It must include your own number and all other key employees.

- Think about forms that would be used in your office. You don't need to create your own forms; instead look on the internet for samples, or visit web sites for forms that can be downloaded. You might even pick up forms from office supply stores like Staples or Best Buy. Add explanations for how the forms are to be filled out (if necessary), including account numbers, shipping instructions, etc. Is your employer's signature required on any form (rather than just your own) before the form is sent out? Consider all possibilities.

- Think about an emergency plan. What do you do if… there is a fire? A water pipe bursts? The toilet backs up? The computer network stops functioning? The security alarm starts ringing unexpectedly? Your explanations should include who to call and any special code or security word might need to be given in that situation.

- Think about special ways of doing things, ways that your employer likes things to be done. Are there visitors that only he/she should see? Who will deal with salespeople who drop in? What happens when your employer's family member calls or visits? Does he/she handle situations when employees are ill and cannot come to work?

- Think about procedures for scheduling appointments. Do you use a paper notebook for recording appointments or do you use scheduling software?

- Think about procedures for beginning the day and for ending the day. What happens when employees go for lunch? What happens when the phone rings during lunch hour?

- Think about business meetings. What, if anything, is done whenever a business meeting is held on-site (providing coffee, organizing materials, distributing sample products). How are attendees notified of the upcoming meeting?

- Use your imagination and your work/office experience, if any, in coming up with material for this manual. Use your fellow classmates as sources of office experience. Share ideas.

More suggestions will be made by PowerPoint presentation over the next few days

Evaluation: Your office manual will represent 40% of your final grade and will be based on:
- Professional Appearance – general presentation, format, spelling, grammar
- Content – table of contents, explanations, forms, range and clarity of details, well organized, reasonable balance of material taken from internet and material created by **you**