

# **BEST PRACTICES IN OFFICE ORGANISATION**

**FEAFFA-EARA TRAINING  
MODULE FOR C&F CERTIFICATE**

# Objectives

By the end of the course, you will be able to:

- Define office organisation
- Outline the process of office planning and layout
- Outline guidelines on effective office management
- Identify office equipment and demonstrate how to use them effectively

# Definition of office organisation

- Office organisation is the arrangement of work such that the activities of an enterprise are divided among its personnel and duties and responsibilities are allocated
- It comprises the formal inter-relationship established among the personnel by virtue of their duties and responsibilities

# Definition of office organisation

- It requires the creation of departments and sections
- The different departments provide efficient information, planning, control and financial services

# Summary note

To organise an office is to arrange its parts so that the whole works efficiently as one integrated body in order for the enterprise to achieve its objectives

# Office practice

- The part of the office organisation that comprises of the allocation of clerical activities to the office personnel, and
- The procedures and methods of performing these clerical activities

# Definition of office

“ An office is a place, or a room or a building where the many clerical activities of the business are carried out so as to provide control, direction, and management of the enterprise”

# Office planning and layout

When planning an office layout, take into account the following:

- The nature of the business
- Capital required
- Site and location
- Size and premises
- Appearance of the premise

# Types of office plans

- Open-plan
- Enclosed
- Landscaped

# Open-plan offices

A large room which is shared by several departments or sections of a department

# Advantages of open-plan

- It allows smooth flow of work.  
Unnecessary movement of staff is avoided, staff time is saved
- Members of staff can locate each other easily
- Easier supervision of staff
- Saves on lighting and space costs

# Advantages of open-plan

- Placement of movable equipment is easy
- Easy to landscape
- Aesthetic sitting arrangements

# Disadvantages of open-plan

- Confidential activities cannot be carried out
- Can easily be overcrowded due to expansion of staff members
- May be considered unhygienic as infectious diseases can be passed on

# Enclosed offices

- An enclosed office is where only one or very few people share one room.
- Usually the doors leading to the offices bear the titles of officers
- Ideal for top-management due to confidentiality

# Landscaped office

Landscaped office is similar to an open-plan office but has extra features such as:

- Indoor plants
- Carpeted floors
- Entire office is air-conditioned
- Workstations are arranged in clusters, each facing a different direction

# Landscaped office

- Rest area where employees relax and take refreshments
- Landscaping assists by creating a pleasant work environment thereby improving efficiency levels

# Effective office management

To organise an office is to arrange its parts so that the whole works efficiently as one integrated body in order for the enterprise to achieve its objectives

# Guidelines to effective office management

- File it so you can find it
  - Create a file category
  - Label folders accordingly
  - File folders either chronologically or alphabetically
- Determine where to store important papers
- Establish a records management program
  - Divide records into three: active, semi-active and destruction
- Have an inventory of records

# Guidelines to effective office management

- Schedule retention period of files: know when to transfer them
- Store records conveniently: storage boxes, drawers, etc

# Office organising tips

- Filing systems should be simple and easy to manage
- Clean each desk drawer to free up storage space
- Clear the top of your desk, then wipe the surface
- Keep essential items on your desktop

# Office organising tips

- If you work with more than one person, create an in-box for each person
- Have a master to-do list for each day at your desk
- Pre-sort your mail: to-file, to-read, to-contact(write or call)
- Use a variety of containers to organise office supplies like paper clips, pens, etc

# Office organising tips

- Use desktop organisers or trays to organise papers that come across your desk
- Create a separate drawer for personal paperwork and effects
- Use storage boxes to store outdated files
- Do not overstuff folders
- Do not overload drawers
- Clear your desk at the end of each day

# Office equipment

- Correspondence
  - Word processor
  - Typewriters
  - Telecommunication
- Records
  - Filing equipment
  - Indexing equipment
  - Microfilming equipment
  - Time recording equipment
  - Shredding machines

# Office equipment

- Reprographic services
  - Photocopying
  - Spirit and stencil duplicators
- Accounting
  - Accounting machines
  - Adding machines
  - calculators

# Office equipment

- Data processing
  - Computers
- Furnishings
  - Executive and general office furniture
  - Desk accessories

# Benefits of effective use of office equipment

- Better communication and interpersonal relations between managers, staff and customers
- Improved records: up-to-date, accurate and reliable records. Invoices, statements and other documents are prepared and served to customers on time
- Reduced costs of production and elimination of wastage
- Reduced mental strain due to availability of office machines such as computers

# Quiz

1. My desk is clear at the end of the day. Yes/No
2. I deal with mail on a daily basis. Yes/No
3. I can locate active files in 10 seconds or less Yes/No
4. I regularly purge closed and inactive files Yes/No
5. I respond to all voice mail and e-mails within 24 hours Yes/No
6. I have a calendar system, paper or electronic, to schedule appointments Yes/No
7. I have an effective method to track and manage my hot action projects Yes/No

# Quiz

8. I have a functional public relations program to stay in touch with my customers Yes/No
9. I have an efficient system to follow up with buyers, sellers, government officials, transporters or shippers Yes/NO

Total how many times you marked 'Yes'

**9 – 10** You are the envy of your office. Keep it up

**7 – 8** With few simple changes, you will achieve more

**4 – 6** You can become better organised. Take one step at a time

**3 – 0** You need to get organised. You will cut back on mistakes and reduce liabilities

# Exercise

1. The failure of most C&F business units is the office. Discuss
2. C&F companies do not need an office. In fact it is believed that given the nature of this business, one is so busy that office organisation is a waste of time as it does not impact on profitability directly. As an expert in office organisation and management, you have been hired by the National Freight Forwarding Association to give advice on this subject. Outline your professional opinion on the subject and make recommendations to the association