



## John Readings Administrative Team: Current Capability and Future Requirements

### Background

In keeping with the core business of the company John Readings has recently expanded its business into publishing a range of fiction and non-fiction authors. According to the company's vision, John Readings plans to establish its reputation as a publisher of some note within five years. The company wants its publishing arm to be recognised for its sustainable practices and innovative application. To achieve this goal, the company will need to engage in several strategic directions:

- Engaging with customers,
- Developing and improving products and production,
- Supporting innovative thinking, management and leadership skills,
- Creating a high-performing organisation,
- Ensuring sustainable materials and processes are used in manufacture and distribution.

On the level of creating, maintaining and storing company documentation, these strategic directions are supported by specific activities, for example:

- Creating standards for internal company documents, in the form of a style guide, to improve readability (for internal and external customers) and to promote a consistent look-and-feel,
- Creating procedures for internal document production that ensure consistent, high-quality outcomes and efficiency,
- Designing templates and standard text in conformity with the style guide and production procedures to improve workflow further,
- Developing people-focused implementation strategies for example delivering training on documentation to ensure the cooperation of all staff in the maintenance of document quality, sustainability, and legal and ethical compliance.

As a new member of the administration team, with a responsibility for team leadership and document design and development, your first order of business is to identify the existing



documentation standards at John Readings. To do this you will need to search through the company documents starting with the company's Style Guide.

In order to plan for meeting current and future organisational needs, you will need to consider current performance and administration team capability.

## Administration Team Performance

The administration team at John Readings performs a range of documentation tasks. These tasks are grouped into several main areas of activity, which provide the basis for measuring performance that drives organisational outcomes.

The administration team uses the following performance scorecard, which includes various targets for documentation output and quality.

| Performance area            | Performance metric (KPI)                                  | Target                         | Outcomes |
|-----------------------------|---|--------------------------------|----------|
| <b>Customer focus</b>       | Per cent of documents conforming to the style guide       | 100%                           | ?        |
| <b>Productivity</b>         | Average time (per mail-out) to edit the letter being sent | 30 minutes                     | ?        |
|                             | Average time per mail merge                               | 5 minutes                      | ?        |
|                             | Data entry error rate                                     | 3%                             | ?        |
| <b>Employee development</b> | Number of training hours per employee                     | 20hrs per employee per quarter | ?        |
| <b>Expense</b>              | Average cost per mail-out (excluding postage)             | \$100                          | ?        |
|                             | Average labour cost per page of edited text               | \$50                           | ?        |



|                       |   |               |   |
|-----------------------|---|---------------|---|
| <b>Sustainability</b> | Average sheets of paper used per letter   | 3 sheets      | ? |
|                       | Average toner use per quarter   | 10 cartridges | ? |
| <b>Compliance</b>     | Identified breaches of legislation, including WHS/OHS, anti-discrimination, privacy | 0 incidents   | ? |
|                       | Privacy related complaints  | 0 incidents   | ? |

## Administration team capability

The administration team has identified six key skills that each team member will need to perform at a practitioner level (see the legend for clarification of levels) or above:

### Team member and current capability

| Work task                                       | You (team leader) | Pat | Sam | Kim |
|---|-------------------|-----|-----|-----|
| Creating and using templates in Word and Excel. | ■                 | ■   | □   | ■   |
| Creating and using macros in Word and Excel.    | ■                 | ■   | □   | ■   |
| Creating and using mail merge features in Word. | ■                 | ■   | ■   | □   |
| Creating and using form fields in Word.         | ■                 | ■   | □   | ■   |
| Creating and using drop down lists in Excel.    | ■                 | ■   | ■   | □   |



|                                       |  |  |  |  |
|---------------------------------------|--|--|--|--|
| Creating and using formulae in Excel. |  |  |  |  |
|---------------------------------------|--|--|--|--|

## Legend:

|  |  |
|--|--|
|  | <b>Untrained</b> – Team member has no training.                                    |
|  | <b>Learner</b> – Team member cannot perform task independently.                    |
|  | <b>Practitioner</b> – Team member can perform task independently with supervision. |
|  | <b>Operator</b> – Team member can perform task independently.                      |
|  | <b>Coach</b> – Team member can train others to perform task.                       |

## Current business needs

In attempting to achieve its wider business goals, John Readings has a number of current specific business needs relating to the skills capability and performance of the administration team in designing and using documentation.

### Letter mail-outs

One of the most common tasks undertaken by the team is writing letters to both internal and external customers. In all cases such letters need to conform to John Reading's house styles. Currently letters are created from scratch. Mass mail-outs present a problem for efficiency as letters are created individually. This practice presents a problem with respect to consistency and wastage of resources. A standard procedure for completing a mass letter mail-out including a mail merge that is consistent with existing letter standards is required. In the interest of budgetary control, only existing organisational software should be required. The entire mail merge process should take no more than 5 minutes to perform.

### Expense reporting

One type of document the organisation currently lacks standard processes for is expense reporting. Staff use a range of methods to report expenses. There are several problems associated with this arrangement. Staff complain about the time needed to input expenses. Administration staff complain about the lack of consistency, including incorrect or incomplete coding of expenses. Allowable expenses codes are:



- Food,
- Transportation,
- Communication,
- Training,
- Other.

A standard procedure for creating expense reports that encourages the use of time-saving macros is required. In the interest of budgetary control, only existing organisational software should be required. The entire procedure should take no more than five minutes to perform.

## Future Business Needs and Capability

At this point it is unclear whether the organisation's software list will be sufficient to take the organisation through the next five years. The advent of social media platforms (Web 2.0) and their use in both internal and external business communications/marketing and digital publishing technologies present both challenges and opportunities for John Readings. Unfortunately, current software capability within the administration team means that the team is barely proficient to use Microsoft Office and they will likely struggle with complex document tasks without further training or recruitment to bolster capability.

## Administration Team Performance (Quarter 1)

The administration team at John Readings performs a range of documentation tasks. These tasks are grouped into several main areas of activity, which provide the basis for measuring performance that drives organisational outcomes.

The administration team scorecard below shows performance metrics, targets and outcomes for the first quarter of the financial year.

| Performance area | Performance metric (KPI)                                  | Target     | Outcomes   |
|------------------|---|------------|------------|
| Customer focus   | Per cent of documents conforming to style guide           | 100%       | 80%        |
| Productivity     | Average time (per mail-out) to edit the letter being sent | 30 minutes | 60 minutes |



|                             |   |                                 |                          |
|-----------------------------|---|---------------------------------|--------------------------|
|                             | Average time per mail merge   | 5 minutes                       | 10 minutes               |
|                             | Data entry error rate   | 3%                              | 10%                      |
| <b>Employee development</b> | Number of training hours per employee   | 20 hrs per employee per quarter | 5 hours in first quarter |
| <b>Expense</b>              | Average cost per mail-out (excluding postage)                                       | \$100                           | \$165                    |
|                             | Average labour cost per page of edited text   | \$50                            | \$68                     |
| <b>Sustainability</b>       | Average sheets of paper used per letter   | 3 sheets                        | 10                       |
|                             | Average toner use per quarter   | 10 cartridges                   | 15 cartridges            |
| <b>Compliance</b>           | Identified breaches of legislation, including WHS/OHS, anti-discrimination, privacy | 0 incidents                     | 0 incidents              |
|                             | Privacy related complaints  | 0 incidents                     | 1 incident               |