


Mobile | 00966536473335 : Mobile | 00966112695229 : Phone : 00966552365295
Email | info.en@scandinavianacademy.co Web site:https://scandinavianacademy.co/en :
Riyadh - Al Khaleej District - Sheikh Abdul Aziz Bin Abdul Rahman Bin Bishr Street - 13223 - Office No. 5 | P.O.BOX : 13224

# Course: The Office Professional and Records Management Masterclass

| Code | City | hotel | Start | End | price | Language - Hours |
|---|---|---|---|---|---|---|
| AC-558SA | Abha | Hotel Meeting Room | 2027-09-19 | 2027-09-30 | 19450 SR | En - 50 |

## Introduction

The Office Professional & Records Management Masterclass is an exciting and interactive programme, designed to provide participants with the opportunity to review and develop interpersonal and professional skills needed to do their jobs effectively, thereby contributing to personal and organizational success.

The programme also covers the strategies, tools, and technologies used to capture, categorise, manage, store, preserve (archive), and deliver documents and records in support of business processes, as well as the core components of ISO 15489 so that organisations become compliant with best practices.

After exploring and developing the multi-faceted skills required of the office professionals and administrative staff (including both inter-personal and technical skills), the combination allows participants to explore in more detail the issues involved in meeting responsibilities for managing documentation and records.

## Objectives

- Extend their understanding of their roles as office managers and administrators and the key contribution they make to organisational success
- Review and develop their personal organisation, communication and interpersonal skills
- Develop an action plan to help themselves, their boss and other colleagues work in more effective and efficient ways
- Understand the key concepts and overall architectural scope of records and

document management
- Develop business cases and business requirements for records management systems
- Identify the business drivers for improving document and records management in their organisations
- Determine how document and records management can be implemented across their organisations
- Assess the implications of technologies, including  Enterprise Content Management (ECM) on  document and records management
- Understand the key concepts and overall scope of ISO 15489 and how to apply ISO 15489 in their organisations

# Content

### Day One

### Programme Introduction/Roles, Competences and Personal Effectiveness

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

### Day Two

### Team Working, Communication and Meetings Team working and team roles

- Briefing skills – giving, receiving and passing on

- Organising, and participating in, meetings
- Notes, minutes and follow-up

**Day Three**

**Managing Working Relationships /Communication Skills/Supervising Admin Staff**

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

**Day Four**

**Managing Time/Desk Management and Office Technology/Writing Skills**

- Planning and priority setting
- Office layout and ergonomics
- Managing the paper-load and developing paperless systems
- Getting the best from office technology
- Letter writing
- E-mail efficiency and etiquette
- Writing and editing reports
- Proof-reading skills

- Setting up/developing writing layout and style guidelines for the organisation
- Writing and designing presentation slides

**Day Five**

**Managing Information & Budgets/Improving Customer Service and Systems**

- Principles of information management – scheduling, filtering and digesting
- Interpreting and presenting statistical information
- Designing and using graphs
- Designing surveys, presenting findings and interpreting meaning
- Basic concepts of financial management
- Monitoring budgets and variance
- Improving  customer service and systems – continuous improvement
- Action planning

**Day Six**

**Strategy and Understanding Key Elements of Documents & Records Management**

- Introduce document and records management
- ISO 15489 Part 1 and Part 2 overview
- Business case and drivers
- Business requirements for managing document and records
- Managing information as an asset
- Understanding the terminology
- Document and records management strategies
- Information governance

**Day Seven**

## Concepts and Set-up Components

- Document and records lifecycle
- Capture and storage management
- Storage and handling
- Preservation and archiving
- Metadata and indexing
- Classification schemes
- Searching and retrieving
- Controls and security
- Legislation, standards and regulation

## Day Eight

## Process and Delivery

- Information gathering: audit and survey
- Building a business case
- Defining business requirements
- ISO 15489 Part 1
    - How to set ISO 15489 policies and standards
    - Assigning responsibilities and authorities
    - Establishing procedures and guidelines
- Business classification scheme
- IT infrastructure details
- Model office and rollout

## Day Nine

## Implementation Planning

- Implementation planning
- ISO 15489 Part 2
    - Designing, implementing and administering specialized systems for managing records
    - Integrating records management into business systems and processes
- Information audit: monitoring compliance
- Project and programme planning

**Day Ten**

**Case Studies**

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

**The Scandinavian Academy for Training Center** adopts the latest scientific and professional methodologies in training and human resource development, aiming to enhance the efficiency of individuals and organizations. Training programs are delivered through a comprehensive approach that includes:

- Theoretical lectures supported by PowerPoint presentations and visual materials (videos and short films).
- Scientific evaluation of participants before and after the program to measure progress and knowledge acquisition.
- Brainstorming sessions and practical role-playing to simulate real-life scenarios.
- Case studies tailored to align with the training content and participants work nature.
- Assessment tests conducted at the end of the program to evaluate the achievement of training objectives.

Each participant receives the training material (both theoretical and practical) in printed form and saved on a CD or flash drive. Detailed reports, including attendance records, final results, and overall program evaluations, are also provided.

Training materials are prepared professionally by a team of experts and specialists in various fields. At the end of the program, participants are awarded a professional attendance certificate, signed and accredited by the Scandinavian Academy for Training Center.

**Program Timings:  9:00 AM to 2:00 PM**

**The program includes:**

- A daily buffet provided during the sessions to ensure participants comfort.
- A closing ceremony on the final day to distribute certificates and celebrate participants achievements.
- **Note: All prices are exclusive of 15% Value Added Tax (VAT).**

# Our Success Partners

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ACADEMY
Scandinavian
Academy
Training Center
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info@scandinavianacademy.co
المملكة العربية السعودية - الرياض - حي الخليج - شارع الشيخ عبد العزيز بن عبد الرحمن بن بشر - 13223 - مكتب رقم 5
Riyadh - Al Khaleej District - Sheikh Abdul Aziz Bin Abdul Rahman Bin Bishr Street - 13223 - Office No. 5