Administrative Office Management

Ninth Edition

Kallaus · Keating

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Norman F. Kallaus
Professor of Business Administration
The University of Iowa
Iowa City, Iowa

B. Lewis Keeling

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PREFACE

The Ninth Edition of *Administrative Office Management* continues a long and successful tradition dating back to the 1930s. Like each of the earlier editions, it responds to the *current* need for explaining the field of administrative office management so that interested students will be well prepared for *future* careers in the office.

Dramatic changes in information technology during the 1980s have expanded the responsibilities of administrative office managers, and the rising costs of administering the office function create problems for the staff and pose new challenges in the effective application of office technology. People working in today's offices must understand these information innovations and be able to adapt themselves effectively to a fast-paced, highly competitive world. More importantly, students of administrative office management must understand the administrative process and the reasons why business firms place more and more reliance upon the office as the center of their key information systems.

The Ninth Edition of this textbook follows the same logical organization plan as its predecessor but with substantial updating and strengthening of content. The fundamentals of effective management are covered in Part One and introduce the student to the management process and basic principles of management, problem solving, and communication needed to administer the office function. Part Two stresses the most basic factor in the office—people. Even though there is a growing dependence on computers and other forms of information technology, the typical office continues to rely most heavily on the competence of its staff and thus considers human problems and human needs of primary concern in the battle to increase productivity.

The Ninth Edition also highlights the fundamental service responsibility of the office—to collect, process, store, retrieve, and move information to the point of use by machine or human methods. Part Three explains the powerful systems of administrative services available for meeting the responsibilities of the office—word processing, telecommunications, records management, micrographic and reprographic services, and general administrative office systems services. Part Four includes a concise discussion of systems analysis, the role of automation in the office, methods of measuring and increasing productivity, and the "bottom-line" importance of living within the office budget.

To improve and update the coverage of the field, the Ninth Edition provides the following new features:

1. A chapter on communication in the office.
2. Discussion of the latest human issues, including ethics, alcoholism, drug addiction, stress, and burnout.

3. Expanded coverage of word processing as a concept at work in manual and automated systems and as an important area of information technology.
4. A combination of records management and forms management principles into one concise chapter that effectively integrates these two areas of the information system.
5. A chapter on office automation that integrates data processing, word processing, telecommunication, and image technologies.

In the Ninth Edition, the word "system" is defined in Chapter One and used appropriately in all chapters. Systems thinking is thus developed and reinforced throughout the textbook, which aids students in understanding the *interaction* of the main components in the administrative office system. Also, systems thinking helps prepare students to apply the concepts involved in discussing the questions posed and in solving the case problems provided at the end of each chapter. In so doing, students develop an understanding of the management process and the skills required to solve management-level problems. Thus, a strong background is provided for assuming responsibilities later as a member of the management team.

This latest edition of *Administrative Office Management* represents the authors' combined teaching, research, and consulting experiences, which have been strengthened considerably by valuable contributions from the following persons:

James Bennett	The University of Texas at Austin
Laurie Campbell	Des Moines Area Community College
Mary Beth Churilla	Lakeland Community College
Darrell R. Clemmensen	California State University
Elise Earl	Tulsa Junior College
Valerie Fisher	Southern Illinois University at Carbondale
Fay Beth Gray	Arkansas State University
David Hyslop	Bowling Green State University
Betty S. Johnson	Lamar University
Aurelia Klink	University of Northern Iowa
Kathy Locke	California State Polytechnic University
Jeffrey E. Long	Administrative Management Society, Willow Grove, Pennsylvania
Margaret Morton	Governors State University
Malik M. Nazir	Illinois State University
Clara Ousley	Knoxville Business College
Sandra Rittman	Long Beach Community College District
Mary F. Robek	Eastern Michigan University
Gary D. Scott	Northern Kentucky University
John D. Staples	Colorado State University
Lorrie Steerey	Eastern Montana University
Vickie J. Stout	The University of Georgia
Karen Lee Woodall	Southwest Missouri State University

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In addition, office managers; students; academic colleagues, including users of earlier editions of the textbook; and a highly competent editorial staff have contributed many useful suggestions for making this one of the best and most widely used books in the field — both in the classroom as a textbook and on the job as a valuable reference book. To these and other key sources of support, the authors are grateful.

N.F.K.

B.L.K.

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1 Administrative Office Management in a Changing Electronic Age

2 Principles of Administrative Office Management

3 Solving Problems in Administrative Office Management

4 Communication in the Office

Photograph courtesy of Hiebert, Inc.

1 Administrative Office Management in a Changing Electronic Age

GOALS FOR THIS CHAPTER

After completing this chapter, you should be able to:

1. Define the functions of management and indicate the managerial levels at which these functions may be carried out.
2. Define the functions of administrative office management and describe some of the typical office activities that may be performed in each of the functional areas.
3. Show how the information-handling responsibilities of the administrative office manager may vary according to the size of the organization.
4. Identify the skills and competencies needed by administrative office managers.
5. Describe the goals of the Administrative Management Society and its Certified Administrative Manager program.
6. Identify briefly the major characteristics of, and contributors to, each of the following schools of management thought: classical, behavioral, management science, and systems.

Because of developments in electronics and computer technology, the environment in today's offices is radically changing. With the explosion in technology, new jobs are created and new career paths emerge. At the same time many of the existing jobs and careers are undergoing change. All of this means that there will be changes in how people work and where they work. However, change and the need to manage it well have always been with us. Managers are still faced with the age-old problems of how to improve productivity, to reduce overhead costs, to increase profits, and to manage effectively their companies' most important asset—their human resources.

In offices that rely upon computer systems, the emphasis is no longer upon the *records* or *forms* produced but, instead, upon the *information* contained in those records or forms. The focus is not on the

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machines but on the *systems* within which both the machines and workers function to create a product — information — at the lowest possible cost. The changes that are coming about bring greater specialization for many office workers. Witness the help-wanted columns where we see employers searching for persons qualified to hold positions such as lead word processing operator, tape librarian, data entry operator, lead programmer, software systems programmer, and database administrator, to name but a few. Also, there is need for managers with a broad knowledge and understanding of the new technology so they can effectively use the "high-tech" tools to improve productivity.

In this opening chapter we shall examine the functions, responsibilities, skills, and competencies of managers, especially administrative office managers, in this changing electronic age. Next, we review briefly some of the philosophies of men and women of the past and present whose thinking and management styles are reflected in today's administrative office managers.

THE FUNCTIONS OF MANAGEMENT

Any form of group endeavor (an **organization**), whether it be a social club, a governmental unit, an educational institution, or a business enterprise, requires leadership and direction at various levels in order to realize its objectives. To achieve its objectives as an organization, a firm must be well managed. Thus, the functions of **management** involve the planning, organizing, and controlling of all resources and the leading or directing of people to attain the goal of a productive, unified organization. Management's task is to blend effectively the *six M's* — manpower, materials, money, methods, machines, and morale — in order to set and to achieve the goals of the organization. In this blending process, those in charge of the organization are greatly involved with directing people and coordinating the economic resources.

The functions of management are performed by persons called **managers** at several levels in any organization, from the office of president to supervisor. The titles held by managers vary considerably depending upon the nature of the work assigned and the responsibilities delegated to the position. Usually managerial levels are divided as shown in Figure 1-1.

THE FUNCTIONS OF ADMINISTRATIVE OFFICE MANAGEMENT

What has been said about management in general also applies to those who are responsible for managing the office and for making decisions that concern the day-to-day operation of the office. (Such decisions often are called **operational decisions** or *administrative decisions.*) **Administrative office management** is the process of planning, organizing, and controlling all the information-related activities and of leading or directing people to attain the objectives of the organization.

Traditionally, the administrative office management functions were limited to basic clerical services and to office personnel. However, with the passage of time came an accompanying increase in government regulations, a larger work force, a growing economy, and the development of new information technologies. All of these factors brought about a demand for handling more information and for making

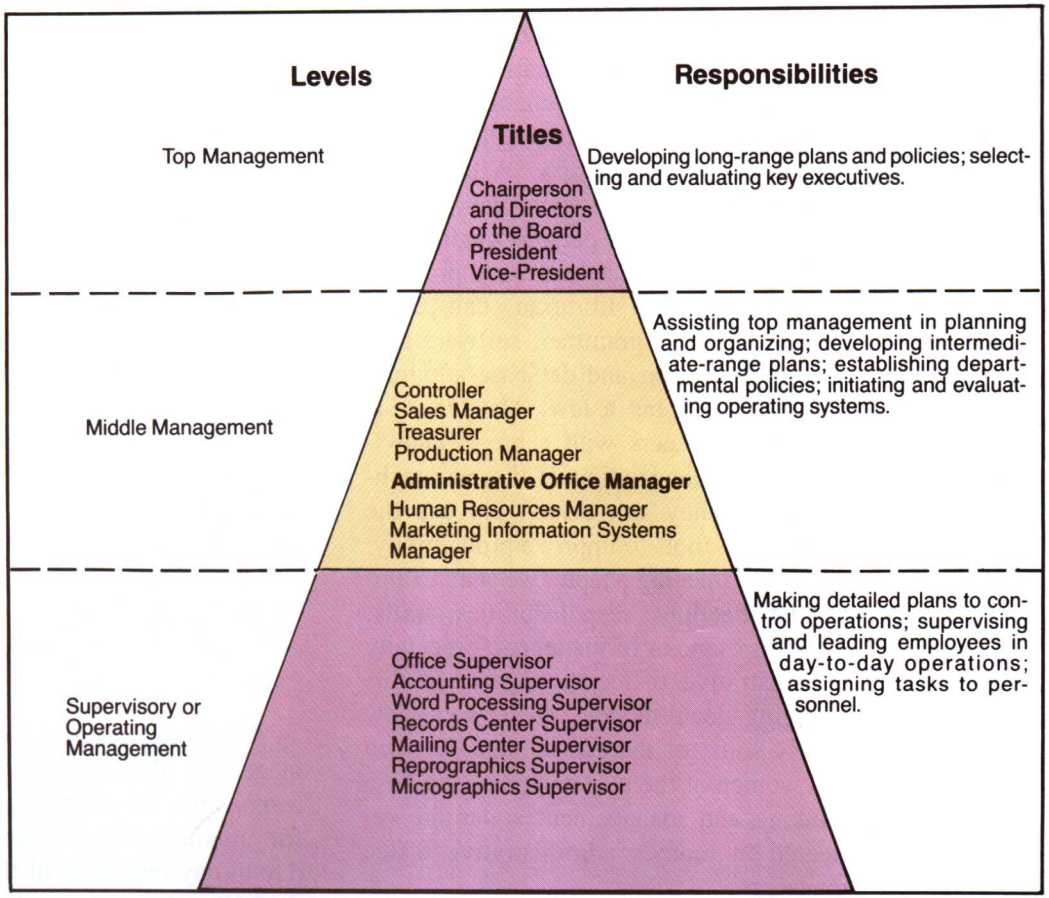

Figure 1–1
Managerial Levels, Titles, and Responsibilities

decisions at greatly accelerated rates. Management began to place more reliance upon office personnel as the new technology gave the office force greater information-processing power. The "one-department office" concept gradually gave way to a broader, company-wide information management concept in which the administrative office functions usually became centralized.

THE ADMINISTRATIVE OFFICE MANAGER

The person heading up the company-wide information management function may have one of several titles, such as administrative office manager; office manager; manager, administrative services; manager, information services; manager of office services; manager, administrative support services; director of administrative services; and administrative manager. Throughout this textbook, the person responsible for planning, organizing, and controlling the information-processing activities and for leading people in attaining the organization's objectives is called the **administrative office manager** or *office manager*. Because of the high frequency with which these two titles are used, they

shall often be abbreviated — AOM or OM — much like the common usage of CEO for chief executive officer.

Responsibilities of the Administrative Office Manager

The scope and responsibilities of the AOM are presented in this book through an identification and analysis of each of the managerial functions as they apply to office activities. The logical sequence of these functions and their related activities is outlined in Figure 1-2.

Although there are similarities in the job content of OMs, no two have exactly the same job responsibilities. In a small firm the OM may be an accountant who also has been assigned the added supervision of correspondence, mailing, filing, and other general administrative services. In another firm, the OM may assume the additional responsibility of human resources manager or credit manager with miscellaneous supervisory activities. In still another company, the OM may be the office services executive who supervises and is responsible for support services, which meet the needs of users in all office divisions. Such support services include mailing, records management, word processing, messenger service, communications, duplicating, and office security and maintenance.

The differences in responsibilities assigned to AOMs are due to several factors, the most important of which is the size of the organization. Many large banks, for

Figure 1–2 Managerial Functions and Related Office Activities

Managerial Functions	Office Activities
Planning: analyzing relevant information from both the past and the present and assessing probable developments of the future so a course of action — the *plan* — may be determined that will enable the firm to meet its stated goals.	Developing policies and objectives for the various information-processing services, such as communications, records management, mailing, and reprographics; procuring a suitable office site; equipping the work areas with modern, functional office furniture, machines, and equipment; staffing the office with qualified employees so the work will flow smoothly and quickly.
Organizing: bringing together all economic resources (the work, the workplace, the information, and the workers) to form a controllable (manageable) unit — the *organization* — to accomplish specific objectives.	Applying basic principles of office organization in determining the working relationships among employees, who are equipped with the best physical facilities and work flows, to achieve the maximum productivity.
Leading: motivating and directing the workers so the objectives of the organization will be successfully achieved.	Directing and supervising effectively the office activities; adopting and implementing workable personnel policies that maintain a desirable level of morale; training, orienting, promoting, and compensating office personnel; providing static-free communication lines between employees and employer.
Controlling: ensuring that operating results conform as closely as possible to the plans made for the organization.	Developing, installing, and improving administrative office systems and procedures to be followed when completing each major phase of office work; supervising the procurement, preparation, and use of office forms and other supplies; measuring the work done and setting standards for its accomplishment; reducing the costs of administrative services; preparing budgets, reports, and office manuals as means whereby costs are reduced and controlled.

example, employ several thousand office workers; and major insurance companies employ 10,000 or more. Naturally, in such organizations where the collection and production of information constitute the main responsibilities of the office staff, the volume of service activities is so great that their supervision and direction under an AOM are necessary. The job description in Figure 1-3 lists the typical responsibilities that may be assigned to a manager of administrative services in large and medium-size organizations. In small organizations, factory workers may be the primary source of business activity. Hence, the office force is not so great in number. In such firms, the office service activities may be supervised directly by an accountant, the controller, the treasurer, the credit manager, or the human resources manager.

AOMs have a company-wide responsibility for managing the **information cycle**—the collecting, processing, storing, retrieving, and distributing of information. In fact, administrative office management is looked upon as a process of converting information into action. Information is viewed by organizations as a critical asset that is every bit as valuable as any physical asset, such as a building or machines and equipment. AOMs are aware that the competitive positions of their companies depend on their abilities to produce timely and reliable information and to use that information productively. Like all other resources, information must be managed.

At all levels of management there is a growing interest in improving the quality of decision making. To do so, decisions must be made upon the basis of relevant, accurate, and timely information. To provide such information, management information systems have been developed.

Management Information Systems

A **management information system (MIS),** usually operated as a computer-based system, is designed to supply timely

Figure 1–3
Job Description Showing Responsibilities of Manager, Administrative Services

Manager, Administrative Services

1. Supervises administrative services, including typing, stenography, reception, printing and/or duplicating, filing, mailing, messenger, distribution of office supplies and similar services.
2. Negotiates the purchase of office supplies and equipment and contracts for service of office equipment.
3. Supervises receiving and shipping functions for administrative departments.
4. Controls interoffice messenger and communications units, maintaining directories and telephone systems.
5. Conducts special studies to determine equipment performance and costs, and reviews new equipment with sales representatives.
6. Coordinates with operating departments to establish new and modified existing systems for administrative services.
7. Trains personnel to perform tasks and indoctrinates them on company policies and procedures.

Source: *AMS Guide to Management Compensation,* Administrative Management Society.

information to managers for use in drawing conclusions, making predictions, recommending courses of action, and in some cases, making decisions in order to take action. Thus, an MIS is directly tied into the productivity of any business enterprise. An MIS encompasses all the internal and external means to an organization by which data are collected, recorded, and processed for operational purposes. The system exists to provide information that will support managers in directing the enterprise in the accomplishment of its objectives. Also, the MIS aids in the processing of data and the keeping of historical records.

The AOM—an Information Manager

An information manager must have a wide range of skills and knowledge in order to manage the information-handling activities of an organization.

In large companies we may find a management specialist with the title, information manager. In addition to having expertise in managing administrative services, the information manager has some of the training and experience required of a systems analyst, a data processing manager, and a communication specialist. Such a broad experience and education are required to understand and to manage the information-handling activities in the organization.

AOMs have always been managers of facts and information. They have had the responsibility for developing and maintaining good systems, efficient personnel, and reliable equipment. With the advent of today's information technology of equipment, programming, and systems, the AOM's sphere of responsibility has extended throughout the company.

Skills of the AOM

The AOM must be a skillful innovator—a creative manager—to administer the changes occurring in the organization's information-handling activities. The types of skills needed by creative managers have been identified as:

1. **Conceptual skill**—the ability to view an entity, such as the organization, as a whole and to see how a change in one part or function of the entity affects all other parts or functions.
2. **Human skill**—the ability to lead a team, to work effectively as a member of the team, and to obtain cooperation from all team members.
3. **Technical skill**—the ability to understand a specific function or activity, with its specialized knowledges, and to use efficiently the tools and techniques related to that function or activity.[1]

The hierarchy of management skills shown in Figure 1-4 indicates the various

[1]See Robert L. Katz, "Skills of an Effective Administrator," *Harvard Business Review* (September/October, 1974), pp. 90–102, in which a detailed discussion of the three skills is presented. At the end of this *Harvard Business Review* classic, Katz brings up-to-date the discussion that first appeared in the January-February, 1955, issue of the *Review*.

mixes of these three skills that are needed at different levels of management. Although the percentage of human skill needed is about the same at each level of management, there are significant differences in the relative proportion of conceptual and technical skills required at different levels.

As pointed out earlier, in many organizations the AOM is found at the middle management level. In Figure 1-4, we see that conceptual skills account for about one-third (31 percent) of the management skill mix at this level. With conceptual skills the AOM is able to view the information management system as a whole and to see how a change in one information-handling activity has its effects upon other activities. For example, in making a decision to install an automated system for retrieving company records, the AOM visualizes how such a change will affect all other phases of the information cycle, especially the processing and storing of records and forms. (Note, in contrast, the amount of conceptual skill needed at the top- and the entry-management levels.)

The largest proportion of the skill mix for the AOM—42 percent—consists of human skills, which mainly concern working with people. Human skills are exhibited daily by AOMs in leading and directing subordinates and in their interrelationships with peers and superiors. As an example, consider the AOM who is appointed to serve as head of a task force investigating a change in work schedules. In this role the AOM displays human skills by being sensitive to the feelings and needs of others and by creating an environment in which workers freely express themselves and offer suggestions for improvement.

A little over one-fourth (27 percent) of the AOM's skill mix consists of technical skill. Technical skill is the most tangible of the three skills and is required of the greatest number of office workers. As an example of the use of technical skill, consider the AOM who is updating the salary compensation plan for office personnel. To develop a fair compensation plan, the AOM must know how to undertake a salary survey and be currently informed of government regulations that affect the payment of wages and salaries. Some of the methods used to adjust salaries may call for the AOM to have expertise in charting current and proposed salary rates or in using mathematical techniques to determine salary rates and ranges.

Throughout this textbook you will be aided in learning more about each of the three skills needed by AOMs. In particular, your skills will be sharpened by solving the case problems at the end of each chapter. You will have additional opportunity to improve your management skills while you work in your chosen career. Thus, by means of academic courses and on-the-job training, you increase your competency as an office manager. In the next section we shall examine those competencies that are needed for effective office administration.

Competencies Needed by the AOM

Studies have been undertaken in which office managers, directors of human resources, and instructors of office management were asked to identify those competencies needed by office adminis-

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