



Office Management Specification Questionnaire

The following questionnaire will assist you in clarifying both key areas of support and assistance required as well as establishing priorities in terms of both set up and continuation of work and roles required.

Part One Requirements

(to include where required the creating/customising of new/existing systems)

	Email & Correspondence Management		Invoice Management
	Appointment & Diary Management		Debtor Management
	Client/Customer & Supplier data		Sales & Marketing Projects
	Website Management		Database Management
	Sales & Marketing Resources		Report Management
	Computer Filing Systems		Office Manuals
	Hard Copy Filing Systems		Training Resources

Part Two Prioritising Requirements

10 = highest priority 1 = lowest priority

	Email & Correspondence Management		Invoice Management
	Appointment & Diary Management		Debtor Management
	Client/Customer & Supplier data		Sales & Marketing Projects
	Website Management		Database Management
	Sales & Marketing Resources		Report Management
	Computer Filing Systems		Office Manuals
	Hard Copy Filing Systems		Training Resources



Part Three Breakdown of Requirements

What do you see as being your key requirements / desired outcomes?

Email & Correspondence Management	Invoice Management
Appointment & Diary Management	Debtor Management
Client/Customer & Supplier data	Sales & Marketing Projects
Website Management	Database Management



Sales & Marketing Resources	Report Management
Computer Filing Systems	Office Manuals
Hard Copy Filing Systems	Training Resources





Part Four Assessing Time Frames for Requirements

Once key office management functions have been targeted and requirements detailed you will want to allocate time lines, or percentage line assignments that reflect both the priority of the tasks and time that is both expected and reasonably required to action them.

Per day, week, fortnight or month	
	Email & Correspondence Management
	Appointment & Diary Management
	Client/Customer & Supplier data
	Website Management
	Sales & Marketing Resources
	Computer Filing Systems
	Hard Copy Filing Systems
	Invoice Management
	Debtor Management
	Sales & Marketing Projects
	Database Management
	Report Management
	Office Manuals
	Training Resources