

Seven Checks to Streamline Documentation in a Paper-based Office Setup

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ABSTRACT

Properly maintained documents remain a strength for an office. It brings about many benefits including improved organisational productivity, employee satisfaction and resilience of the management to a range of challenges. Traditionally, it is known that proper maintenance of documents itself require significant effort by the office staff. Hence, the presence of a flowless set of documents can be rare especially in busy environments. The objective of this piece of work is to generate Kaizen suggestions for this problem. The method used in this project was brainstorming involving participants with significant experience in both management and productivity. Seven checks that have to be performed before placing the signature on a letter were discovered so that files are being streamlined without requiring much effort.

Key Words: *Office Management, Kaizen, Paper-based Documentation, Checklist, Employee Marketing, Knowledge Management, Behaviour Change*

1. INTRODUCTION

The office is the central place in an organisation where the information is received, processed, issued, and even stored. Further, it acts as the focal point for maintaining communication not only within the organisational line of authority but also with the stakeholders. Despite the technological advancement, paper-based communications continue to be popular due to various reasons predominantly including legal concerns.

In this regard, issuance of letters plays an important role within an office setup. All such letters exchanged through an office needs to be preserved for future references due to various concerns. These records are stored in the form of a set of files that are categorised based on the subject area. The quality of this file management is the determinant of many factors including the efficiency of document retrieval procedure, security, validity, and the accuracy of the data.

Absence of a properly managed set of files has long been an empirical observation in offices in the developing world, and it has become a main barrier in improving productivity (National Productivity Secretariat, 2015). Furthermore, haphazard file management degrades institutional memory, which in turn adversely affects the vital managerial functions including decision-making and planning abilities. Moreover, lack of explicit evidence resulted from improper file management makes managers more susceptible to potential legal challenges.

Meanwhile, it's worth noting that certain good practices are prevailing among office staff from diverse office setups, yet achieving satisfactory outcomes in those offices remains challenging to observe. This urges productivity practitioners to shift their focus towards human errors, knowledge management and behavioural science so as to solve this problem effectively and efficiently. Having those principles in mind, generating Kaizen suggestions to bring those good practices to a workable position was the objective of this project.

2. METHODOLOGY

It has been widely accepted that Kaizen philosophy is one of the great methods of generating creative solutions especially for lingering problems.

Brainstorming was performed as the method of generating a Kaizen solution for streamlining documentation. Given the advantage of having participants with prior experience in both management and productivity improvement activities, purposive sampling was conducted. In generating suggestions, participants followed certain principles of Work Improvement Team, and the generated suggestions were refined with experience sharing.

A seven-point check list was invented as a Kaizen solution. Those checks were proposed to be performed by both the staff preparing documents for the signature and the manager who signs the letter.

For the purpose of improving employee compliance, the techniques of employee marketing were used. Accordingly, the appearance of the checklist was rejuvenated with graphic work so that it is apparent enough to elicit a behaviour change to follow the content. A vector graphic that has been made available under the license “Creative Commons CC0 1.0 Universal Public Domain Dedication” was used for creating the artwork (Wikimedia Commons, 2020). It was recommended to display this graphic on work tables and set it as the “Desktop Background” on computer screens.

3. RESULTS

Table 1 shows the formulated checklist.

Table 1: Checks for Streamlining Paper-based Documentation

Component	Mark
The correct file is chosen.	<input type="checkbox"/>
Office copy is attached to the file.	<input type="checkbox"/>
Office copy is numbered.	<input type="checkbox"/>
Cross reference is made in the office copy when appropriate	<input type="checkbox"/>
Receivers' details were highlighted in all copies of the letter	<input type="checkbox"/>
Rubber stamp is placed in all relevant places	<input type="checkbox"/>
Minute sheet is updated.	<input type="checkbox"/>

Figure 1 shows the depiction developed for the purpose of displaying in the work place by means of posters and desktop wallpapers aiming at intensifying the acceptability of this checklist by the employees.

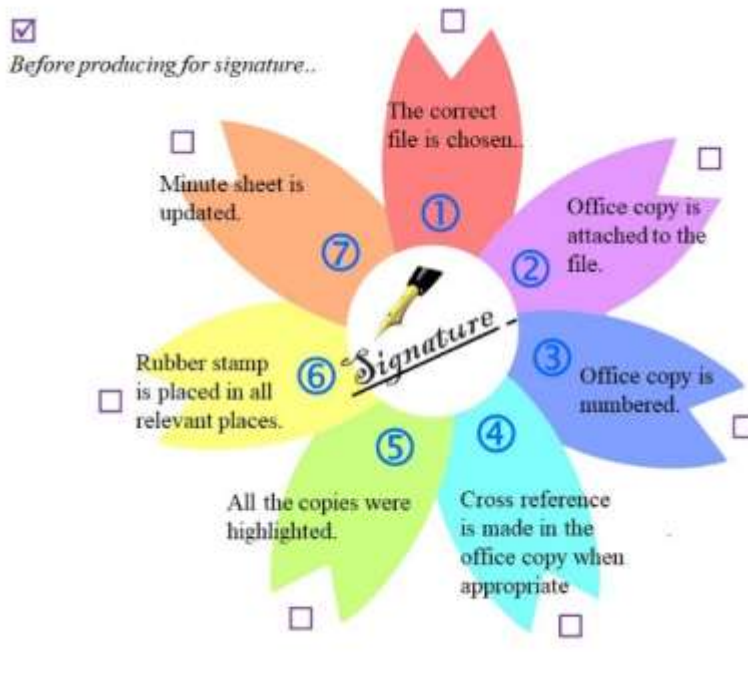


Figure 1: Graphical Version of the Checklist for Displaying in the Workplace

4. DISCUSSION

All the elements in this checklist appear simple tasks that an office employee can easily perform, However, owing to human factors, this simplicity itself has made the staff neglect the importance of them. As Maurer (2014) discusses, addressing small but crucial moments is one of the key strategies in Kaizen philosophy. Similarly, Gunaratne (2015) points out that simplicity, cost-effectiveness, high feasibility, improvement in the work environment, immediate results generation, and a focus on enhancing productivity are the benefits associated with a Kaizen suggestion. Therefore, it is evident that these suggestions align with all those features, demonstrating their adherence to the Kaizen concept.

Significantly, this checklist transforms certain tacit knowledge into explicit knowledge, mirroring the process of “Knowledge Externalisation” described by Nonaka (1994). Simultaneously, it is observable that the principles of “Employee Marketing,” as outlined by Ambler and Barrow (1996), have also been incorporated within these suggestions. In addition, this checklist is recommended to be utilised by both the employee drafting the document and the manager who signs the letter. This aligns with the “Swiss Cheese Model” introduced by Reason (2000) for error minimization. Thus, this project serves as an example of the potential to integrate Kaizen philosophy with other principles and theories.

As Rogers (2003) explains, new ideas require effective communication within a supportive social framework over an adequate period of time for successful diffusion. As far as institutions are considered, the chain of command acts as the legitimate structure in passing instructions, and it is advisable for a manager to convey these suggestions to the employees preserving the proper channels of communication. Additionally, continuous monitoring through two-way communication, preferably in the form of meetings, can also be suggested to reinforce the newly adapted behaviour among employees.

It is further beneficial to test the effectiveness of these Kaizen suggestions by assessing their influence on the office system. Thence, it is recommended to conduct research measuring the productivity difference before and after implementation, utilizing the appropriate indicators as shown in Table 2, and employing qualitative methods.

Table 2: Suggested Indicators for Measuring the Effectiveness of the Implemented Kaizen Suggestions

Indicator
Time taken to retrieve an office copy of a previously issued letter
Time taken to find a pertinent document within a file using cross-references
Time taken to locate a relevant document within a file using its minute sheet
The level of employee satisfaction specifically related to involvement in file management

5. CONCLUSION

A checklist was developed as a Kaizen suggestion aimed at streamlining documentation through an enhanced file management system. It is worth noting that certain managerial and marketing principles were introduced into the context through these Kaizen suggestions. Indicators were introduced to facilitate researching the effectiveness of these suggestions.

6. LIMITATIONS

To enhance practicality, only the essential components were included in this checklist. The indicators proposed to measure the effectiveness were narrowed down for feasibility in measurement.

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BIOGRAPHIES



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