

WA7: Business Travel, Diary Systems, Meeting organization and event management

3.12 Design (control the type of information needed) and manage diary systems.

LO73: Demonstrate ability to manage diary systems to meet the needs of the workgroup and its internal and external customers/clients.

LO74: Demonstrate ability to design a diary system that is appropriate for the company or organisation

LO75: Demonstrate ability to analyse reports from diary operators and users in order to recommend enhancements and necessary training.



Module Details



Work Area Code:	7
Work area title:	Business Travel, Diary Systems, Meeting organization and event management
Unit Code:	3.12
Unit Title:	Design (control the type of information needed) and manage diary systems.
Learning Outcomes Ids:	LO73, LO74, LO75
Learning Outcomes titles:	<ul style="list-style-type: none">- Demonstrate ability to manage diary systems to meet the needs of the workgroup and its internal and external customers/clients. (LO73)- Demonstrate ability to design a diary system that is appropriate for the company or organisation (LO74)- Demonstrate ability to analyse reports from diary operators and users in order to recommend enhancements and necessary training. (LO75)
Recommended Duration:	2 hours
Trainer:	



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By the end of this unit learners will:

- Describe how to identify the needs of the workgroup and its internal and external clients
- Manage diaries of a group of co-workers
- Keep diaries updated and synchronized
- Relate the needs of the organisation to the designed diary system
- Develop diary system of the specific organisation taking into consideration its own operations and needs
- Identify necessary information that can be used for analysis of the current situation and recommendations for enhancements.
- Collect data and information to be used for analysis of the current situation and analyse the current situation in order to recommend enhancements or trainings



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The need for Diary system



The efficiency of the whole organisation may be said to depend on the correct upkeep of the diary systems in use. Although it may seem a very minor role, it would be very difficult if each member of staff had to remember what appointments they had and where they were meant to be at any given time.



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The need for Diary system



Diary Systems help individuals to:

- Plan
- Coordinate
- Recall past actions
- Track current - statuses of actions and tasks
- Finding and booking suitable venues



The need for Diary system



Administration employees have to spend significant amount of time trying to coordinate people's diaries in order to schedule meetings, deliveries, etc.



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The need for Diary system



- A diary system allows meetings to be scheduled when the majority of people is available.
- We can use them for:
 - Social and PR activities (reminders for birthdays, name days etc)
 - For travel arrangements
 - Business meetings, customer presentations etc

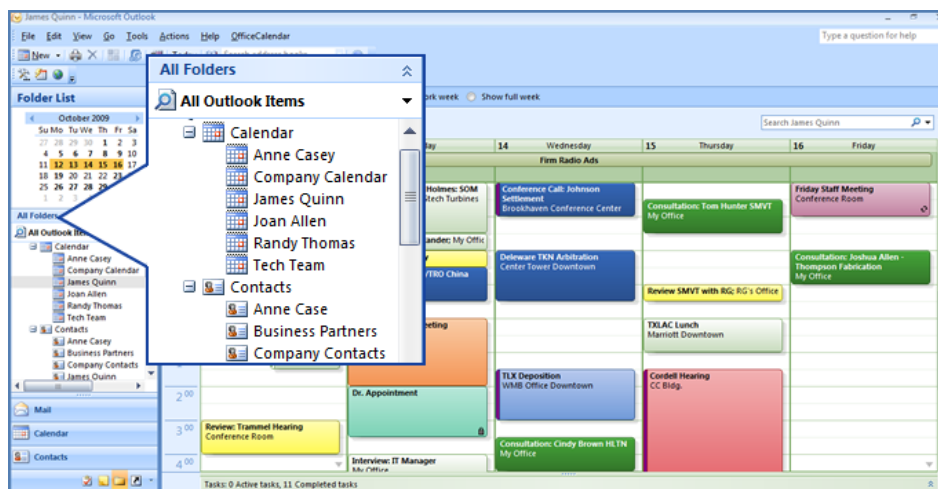


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Electronic diary system features

- What can an electronic diary be used for?
 - Keeping a diary
 - Sharing a diary
 - Viewing free times
 - Booking meetings
 - Room and resource booking



Benefits of diary systems



- Information on activities, staff availability and customer appointments is always available.
- It is easy to check whether a member of staff is supposed to be in the office. This means you don't waste time trying to contact someone who is away or otherwise not available.
- Because you can check the future plans of staff you can often answer queries quickly and easily just by referring to the diary.



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Benefits of diary systems



- You can arrange meetings even when some of the participants are away from the office, simply by looking for the next date when everyone is free.
- Resources can be used efficiently and fairly as they can be allocated throughout the day using a booking system.



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Benefits of diary systems



- There are fewer dangers of problems through forgotten appointments or double-bookings.
- Important information about an activity (or resource) can be entered in the diary for ease of reference, such as the contact number of a customer or the location of a meeting.
- The diary can act as an important reminder system.



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Electronic diary system features



1. The main idea of information needed to maintain within a diary system is recording and saving important data, collecting specific information about future meetings or business travel, and appointments.



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Electronic diary system features



2. Well known office systems use computerised diaries with number of values of organisation resources saving each time by recording, knowing, and confirming about time and date of information received, updated, amended, or installed and reserved.



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Electronic diary systems features



- It also provides information about a customer, personal diary tracks for staff, facilities of a meeting arranged, sending reminders, and prompts future actions.



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Electronic diary systems features



3. The system fails when a person forgets to enter information about customer data, update the change in the details, fulfilling dairy at part, or put inaccurate records into system. However, these are information needed to maintain using diary systems in a working environment



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Electronic diary systems features



4. Electronic diary systems can be created on a computer, a phone or an electric organiser. On a computer there are many different programmes you can use to make a diary system, so it is down to personal preference.



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Electronic diary systems features



5. If diary systems are electronic there is always the possibility of password encrypting them to ensure only people with authorised access can view and edit them.



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Advantages of electronic diary systems

- You can synchronize data between devices.
- Password Protection Possibility
- Corrections are easy
- You can share with colleagues



Disadvantages of electronic diary systems

- System failure could make the information inaccessible or, worse, all records could be deleted
- Not everybody is sufficiently computer literate to use the system
- Electronically held information is always at risk because of hackers



Manual diary systems



A hard copy, or a manual diary system, is often in the form of a bound or ring-bound book. They come in many different day/month formats so it will need to be considered how many entries will be going into the diary before selecting.

Advantages:

- More personal
- You can take them everywhere
- No IT skills needed

Disadvantages:

- Not easy to make corrections
- You cannot share with colleagues
- Irreplacable when lost



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Wall planners

- In many organisations there are one or more wall planners in each staff maintained room which are updated regularly. These are useful as they are always within sight.
- Special designs are available to suit different purposes
- Paper based
- White Board / Stickers
- Magnetic





Activities involved in managing diary systems



1. Obtain the information you need about new activities or requested changes
2. Prioritise requested changes or new activities
3. Identify the implications for existing entries (if any)
4. Solve problems that arise by negotiating alternative arrangements
5. Record agreed changes in the diary
6. Inform agreed changes to those affected
7. Keeping the diary up-to-date



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Information needed to maintain a diary system



- planned events - changes, alternatives, cancellations;
- dates, times, durations,
- locations,
- attendees,
- priorities,
- clashing commitments,
- confidentiality etc.



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Why should you obtain relevant information about requested diary entries and changes?

- Requests for changes may appear to be relatively minor, but may have a knock-on effect which could have major implications. Delaying an appointment could cause the person attending the meeting to be late for, or even unable to attend, other meetings arranged for later in the day. It is important, therefore, to check the effects that a requested change will have before agreeing to it.



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Why should you obtain relevant information about requested diary entries and changes?

- All relevant information have to be obtained because you have to make sure that everyone attending the meeting or any appointment has convenience and are given all the details, so that there is no error at any end at any time.



Prioritizing when making changes

1. Consider the type of event or activity and its urgency or importance. In most businesses events involving external people – especially customers – are given priority over internal events. This is because increasing sales/meeting customer targets is an important aim of all businesses.



Prioritizing when making changes

2. Consider the hierarchy of the employees involved
3. Look at the order in which you received the requests. If both the events and the people making the request are 'equal' in terms of importance and status, then the general rule is 'first come, first served'. This normally saves any further arguments.



Prioritizing when making changes

- Everyone involved with the meeting have to be contacted and made sure it is convenient for everyone before requests or changes are confirmed
- Changes that affect appointments on the day that you receive the changes, will need dealing with, before changes to appointments or meetings in the future.



Communicate the changes

- Electronic diary systems may **automatically** communicate changes to those involved whose systems are networked with yours
- **However, it is likely that they might miss the notification!**
- So, better to get in touch with anybody else affected.
- Depending on the timescales involved, this may be done by telephone, e-mail, fax, letter or verbally.



Communicate the changes

- Changes have to be communicated **on time**, and if you are responsible for other people's diaries it is vital that you communicate any changes to them in good time to enable them to prepare for any meetings or travel involved. It is also important to leave sufficient time in the day for them to deal with routine matters and sufficient travelling time between appointments if necessary.





Communicate the changes

- Others who are affected by the changes will also have other appointments in their diaries. It is important that you do not give them the impression that changes are being made either lightly or, conversely, because something more important has come up.



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Keeping diary up to date



- Keeping the diary up to date when changes have been agreed is extremely important.
- You have to make sure that you have deleted any cancelled appointments.
- It is both annoying and embarrassing to arrive for an appointment only to be told that it has been cancelled, as well as being a waste of time



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Confidentiality issues



- There may be questions of security and confidentiality involved when communicating amendments to arrangements, because there may be negotiations taking place which could impact on the future of the organisation. If you are aware of these as a result of arranging meetings, it is important that you do not make this information available.



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Confidentiality issues



- Examples: occupational health appointment, formal review, disciplinary meeting, rehabilitation or safeguarding meeting etc...



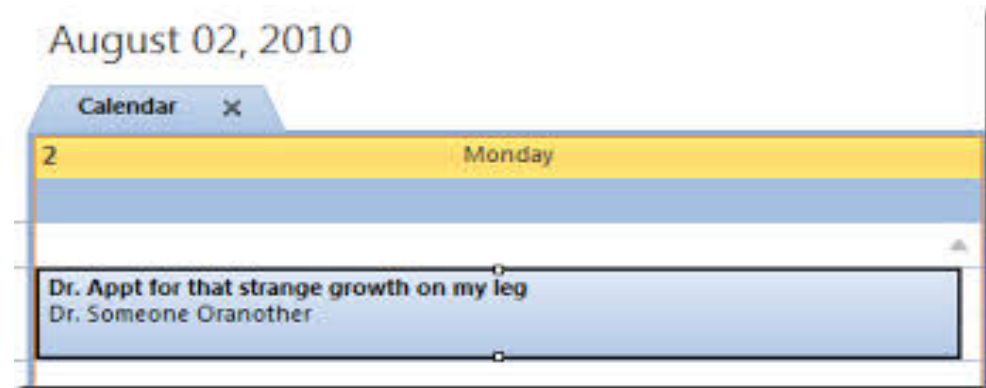
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Privacy issues



- Employees often record their private arrangements in to the office shared calendar systems
- Respect their privacy and do not share this information with other colleagues



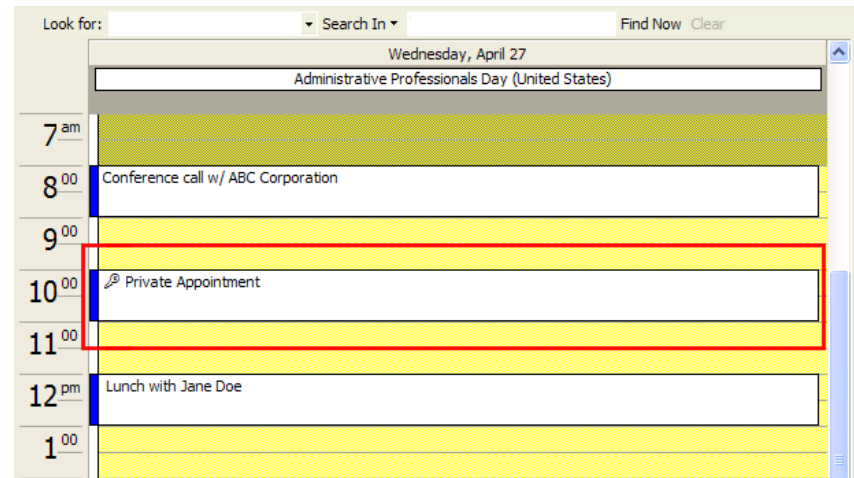
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Privacy issues



- Train your colleagues how to mark any appointments as private, so no one they share their calendars with, will be able to see the appointment details



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Methodological tool

- Problems related to diary management
 - EUPA_LO_073_M_001



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Common problems with shared diaries



- **Overlap of multiple requests** – care needs to be taken that requests do not overlap as they can create chaos and prevent people from attending meetings or appointments.
- **Duplicate or double bookings** – a common error that occurs when the diary is handled by multiple people and communication is poor
- **Not communicating requests or change in requests** – poor communication fails the entire system



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Common problems with shared diaries



- **Not confirming requests** – requests need to be confirmed, otherwise one will not be sure if the request will go ahead. Sometimes this results in slots remaining vacant, putting the people in need on wait
- **Not recording the requests** - this will show as vacant when there actually is a request



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Finding out the needs of users

Things to consider:

- Think about the way the company functions (processes)
- How do people cooperate (option for a team diary)?

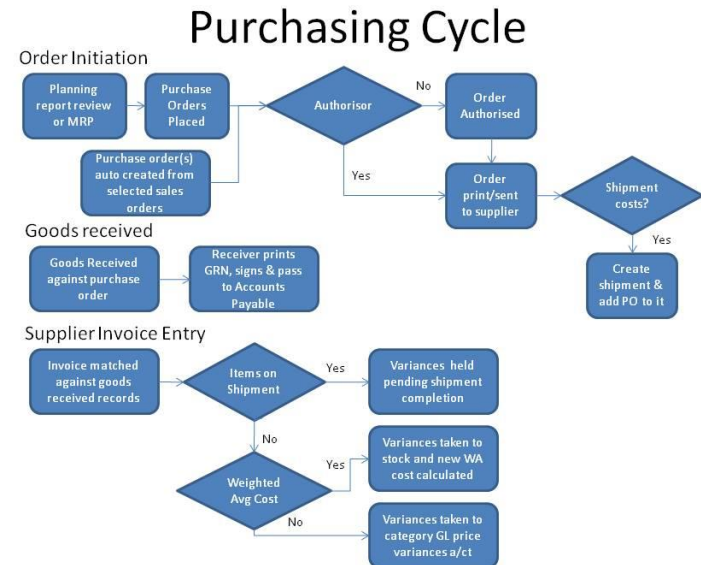


Finding out the needs of users



Things to consider:

- How many and how often the meetings are being held
- What about external meetings?
- Are there any shared resources? Do they need coordination? (cars, meeting rooms,...)



What to ask about?



- What do you need to make your job easier in terms of time planning and coordination?



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What to ask about?



- Do you have any suggestions based on previous experience, recommendations?



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What to ask about?



- Where do you find biggest issues in company's current diary functioning?



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What to ask about?



- What tools/apps do you use for personal time-planning?



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How to collect information



- Interviews
- Online or paper-based questionnaires
- Analysis of the past data
- Metadata analysis



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Interviews

- **Unstructured, semistructured, structured**
- **Used** when you want to fully understand someone's impressions or experiences, or learn more about their answers to questionnaires

Advantages

- get full range and depth of information, develops relationship with client, flexible

Disadvantages

- can take much time
- -can be hard to analyze and compare
- -can be costly
- -interviewer can bias client's responses



Questionnaires

- Questions can be:
- Open ended (more difficult to extract quantifiable data)
- Closed
- Fixed-choice
- Likert scale - where participants are given a range of options (agree, strongly agree, disagree...





Things to consider:

- Budgetary issues
- One-time payment or regular subscription fee
- Compatibility



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Things to consider:

- Ability to synchronize
- Usability „on the go“
- Cloud based
- User-friendly



What to choose from?



There are currently many time-planning tools on the market that can be used for business

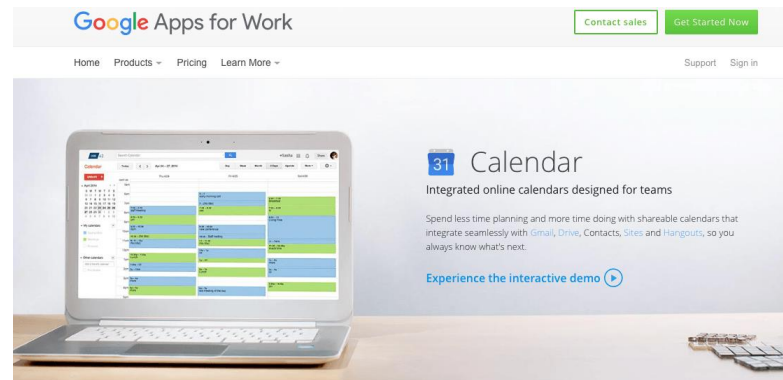


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What to choose from?

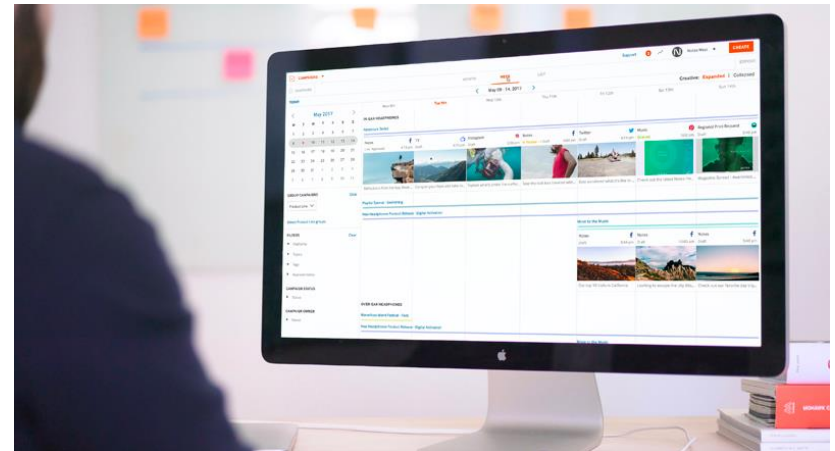
- From standard and well known but pricey such as **Outlook Exchange**, to popular **Google calendars** that are free to use
- Some are also compatible with one another such as **CalenGoo** is compatible with Google and many others



What to choose from?



- If you have the budget, and none of the marketed solutions is right for your company, you can have one developed that would be **tailor made** especially for you



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Methodological tool

- Shared calendars for a recruitment company
- EUPA_LO_074_M_001



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Where to search for drawbacks



- Listen to what people say
- Ask about their opinions – develop feedback questionnaire
- Analyze problems from the past



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Calendars are not used by everyone

- create a need / buy-in





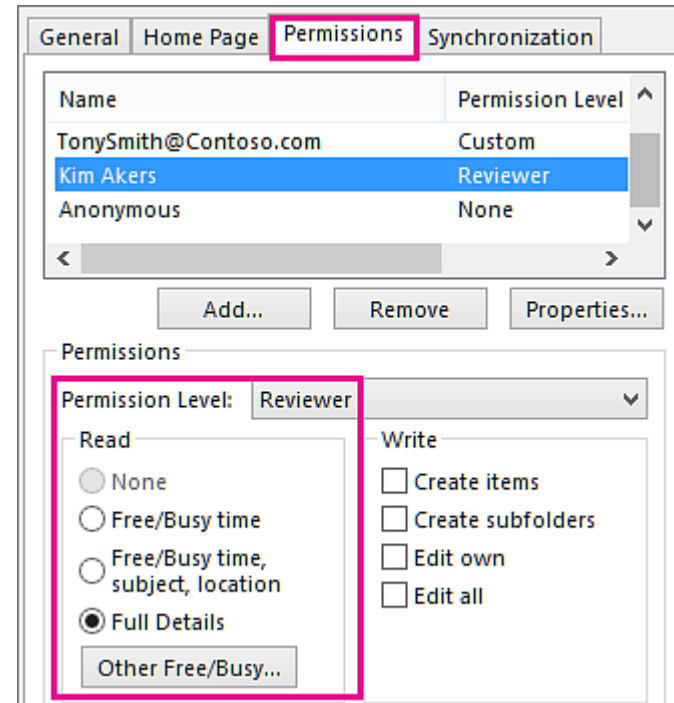
Data entered is incomplete or not updated

- train employees
- change the system so it will ask automatically for details when entering new event



Data loss/untrackable changes

- changing system setup, calendar owners and their rights



Methodological tool

- Diary enhancement
- EUPA_LO_075_M_001



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- **Review Question 1**
 - What activities does the person responsible for managing the workgroup diaries need to perform?
- **Review Question 2**
 - Explain confidentiality and privacy issues related to diary systems and how would you solve them
- **Review Question 3**
 - List possible techniques that can be used for collecting information for analysis of the existing diary system



- **Managing the diary:**
 - Prioritize in making changes
 - Communicate the changes properly
 - Keep diary up to date
- **When developing diary system:**
 - Consider business processes
 - Consider user needs and experience
 - Maximize effectiveness and user-friendliness





Well Done!

**You have
completed
this unit**



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