Work Area 1 Office Procedures

2.1. HANDLE THE MAIL

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Module Details

Work Area Code:	**1**
Work area title:	**Office Procedures**
Unit Code:	**2.1**
Unit Title:	**HANDLE THE MAIL**
Learning Outcomes Nos:	**LO001, LO002, LO003**
Learning Outcomes titles:	• Demonstrate ability to describe and follow the procedure through which the organisation handles incoming and outgoing mail • Demonstrate ability to arrange incoming mail appropriately (control of documents, delivery to the right persons, etc.) • Demonstrate ability to collect, arrange and dispatch outgoing mail accurately
Recommended Duration:	**5 hours**
Trainer:	

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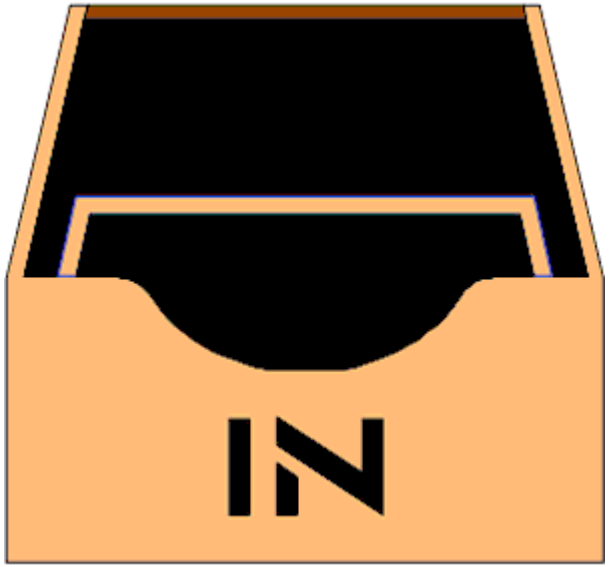
What we mean by the term mail

- Anything that arrives to the office through
  - Post
  - Fax
  - Courier
  - Email
  - etc



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Handling mail

- Sorting the mail
- Distributing to the proper departments or individuals
- Opening the employer's mail
- Prioritising
- Gathering necessary preliminary information to answer specific requests or solve problems.

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What a policy of handling mail usually includes

- A company policy of handling **incoming** mail includes:
  - Who collects it
  - What they do with it
    - Record?
    - Copy and distribute?
    - Stamp, copy and distribute?
    - Just distribute?

- No right or wrong as long as a policy exists
  - Usually a trade off between administrative work (that is time spent) and ability to trace back a mail item

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What a policy of handling mail usually includes

- A company policy of handling **outgoing** mail includes:
  - Who can send outgoing mail
  - Who is responsible for mailing
  - Some kind of recording exists?
- No right or wrong as long as a policy exists
  - Again a trade off

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Why it is important

- Mail is an important method of communication between a company and the outside business world

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Why it is important - possible scenarios

- Scenario A:
  - A customer has sent a request for proposal by post. The person responsible for the distribution delayed to deliver it.
    - **Result**: We missed the deadline to submit the tender.
    - And... We did not even respond to the customer.

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Why it is important - possible scenarios

- Scenario B:
  - A supplier has sent an invitation to our manager for a cocktail party. The invitation never reached our manager.
    - **Result:** The manager missed the party and did not even reply to the invitation

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Why it is important - possible scenarios

- Scenario C:
  - Our banker requested our financial statements to be send via fax in order to renew our facilities for the next year. He does not receive it.
    - **Result**: Facilities are not renewed.

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Why it is important - possible scenarios

- Therefore mail handling affects:
  - Our business development
  - Our operations
  - Our image.

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Problems arising from inefficient mail distribution

- Missing a deadline
- Pending payments
- Attachments missing
- Junk/ suspicious mail

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Procedures for handling mail

Describe different types of procedures

(draw flowcharts on flipchart)

Identify simple improvements to the procedures

Group discussion

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Methodological tool

Identify the company policy and recommend improvements

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Incoming Mail Policies (1)

- Use of Control of documents
  - Whatever type of document reaches the office, is stamped with the date and the person to whom it has to be distributed. Before distribution, the document is copied and stored in a control of documents file. In this way, the company keeps an extra copy of all the documents and also keeps track of the person to whom the document has been distributed. Moreover, this practice removes any suspicious documents.

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Incoming Mail Policies (2)

- Effective recording of incoming mail
  - Keep an excel file or a word table and add an entry each time a document reaches the office. The entry should include:
    - Date
    - Sender
    - Recipient
    - Subject
    - To whom it has been given

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Data protection and confidentiality

- Guidelines for data protection and confidential documents
  - Post should be opened away from public areas.
  - Where confidential mail is received e.g. marked Personal, Private & Confidential, In Confidence etc. this should only be opened by the addressee unless authority has been delegated.
  - Post 'In/Out' trays must be sited away from the general public and stored in an area with controlled access.

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Data protection and confidentiality

- Guidelines for data protection and confidential documents
  - Request that external organisations use secure post facilities;
    - either Recorded (signed for) or
    - Special Delivery, (tracked and signed for) or
    - Private courier
  - They should also use tamper-evident packaging so one can see if the package has been accessed inappropriately.

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Identifying junk mail

- No sender address
- Sender address from countries you do not work with
- No recipient name (probably advertising material sent to the organisation)

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Methodological tool

Handling Incoming Mail

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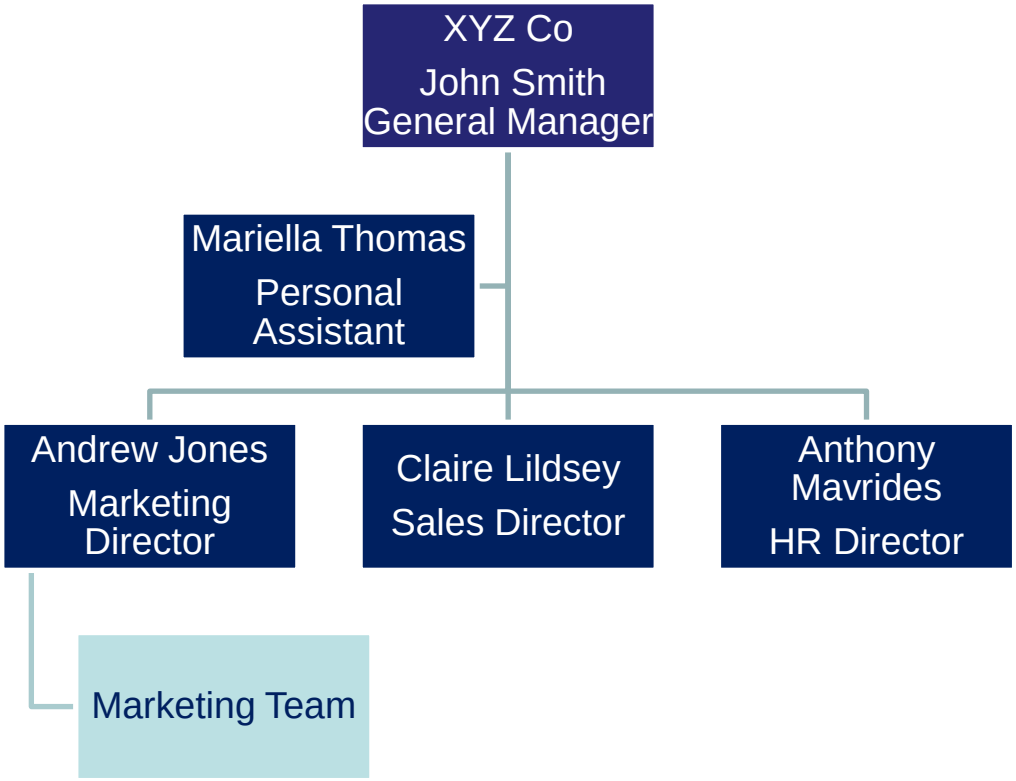
Identify the appropriate recipient



In the mail received there is a request for a sponsorship for an event that will be organised for the orphans. The mail is addressed to the General Manager of the company (no name is provided). Where will you direct the mail to?

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Outgoing mail policies

- Collect mail from co-workers
- Register mail on a control registry of outgoing mail including information such as:
  - Sender
  - Recipient
  - Subject
  - Method of dispatch

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Outgoing mail policies

- Sort mail according to the dispatch method (post, courier)
- Prioritize – identify urgent mail
- Ensure dispatch price is within the agreed budget
- Arrange services for collection of outgoing mail

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Addressing for success

- A company is judged...
  - ... By the way its envelopes are addressed
- It does not just create a good impression, it also affects whether the mail is delivered on time

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Addressing for success

- Take the following into consideration
  - Use a clear font that is easy to read
  - Use an appropriate font size
  - Ensure that address is visible through the window of the envelope
  - In case of foreign mail, ensure that you also have the correct country name
  - Ensure you use the appropriate spacing between characters, words and address lines.

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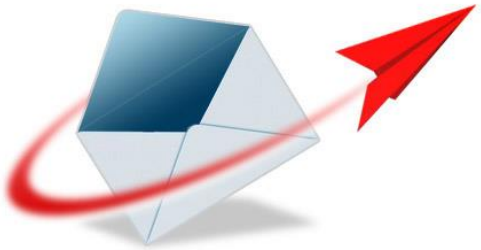
Post office requirements for outgoing mail

- Addressees' name
  House number and street name
  Locality name (if needed)
  Town (please print in capitals)
  Full postcode (please print in capitals)



- Don’t use full stops or commas
- Start each line on the left (don’t centre the lines)
- You don’t need to write the name of the county if you’ve included the town and postco

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Update your address lists often

- The following is a list of recommendations
  - Standardise the address list making sure that you have all the information
  - Ensure post codes are correct
  - Correct any spelling mistakes

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Hazardous and illegal items

- In general it is illegal to send by post anything that can harm to, injure or deathly injure a person, or obstruct mail service or damage property. Harmful or dangerous objects/ items include, but are not limited to, the following:
  - All poisonous (toxic) or infectious substances
  - All living creatures, like turtles, spiders, snakes
  - All pathogens that can cause disease, like a virus
  - All explosive items, flammable material or chemicals

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Hazardous and illegal items

- Legal restrictions are also placed on items such as the following:
  - Firearms, knives and sharp instruments
  - Drugs and narcotics
  - Vehicle master keys
  - And others

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Different types of mail services

- Mail services differ between countries
  - Express mail
  - Priority mail
  - First class mail
  - Registered mail
- Also courier services
- Decision depends on
  - Available budget
  - Requested time of delivery
  - Importance of the document

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Important factors in mail dispatching

- Check the address twice
- Take into consideration the urgency of the mail
- Take into consideration the available budget

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Methodological tool

Handling outgoing mail

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Handling International Mail

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- Review Question 1
  - Describe a general organisational procedure for handling incoming mail

- Review Question 2
  - Describe a general organisational procedure for handling outgoing mail

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- Review Question 3
  - List main principles that need to be followed when dealing with confidential mail

- Review Question 4
  - List available methods for dispatching mail

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- Incoming Mail Policies
  - Control of documents
  - Recording mail
- Outgoing Mail Policies
  - Collect and register
  - Sort and prioritise
- Data protection and confidentiality

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Well Done!

You have completed this unit

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