



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

### 4.6 Recommend improvements to diary systems

LO108: Analyse the effectiveness of existing diary systems based on users' needs and business requirements in order to make recommendations for improvements and the necessary training.



# Module Details



<b>Work Area Code:</b>	7
<b>Work area title:</b>	Business Travel, Diary Systems, Meeting organization and event management
<b>Unit Code:</b>	4.6
<b>Unit Title:</b>	Recommend improvements to diary systems
<b>Learning Outcomes Ids:</b>	LO108
<b>Learning Outcomes titles:</b>	<ul style="list-style-type: none"><li>- Analyse the effectiveness of existing diary systems based on users' needs and business requirements in order to make recommendations for improvements and the necessary training (LO108)</li></ul>
<b>Recommended Duration:</b>	1 hour
<b>Trainer:</b>	



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By the end of this unit learners will:

- List the factors that affect the effectiveness of a diary systems taking into consideration users' needs and business requirements.
- Examine the existing diary systems and outline their advantages and disadvantages
- Recommend improvements to the existing diary system so that they are more aligned to user's needs and business requirements.
- Find new possibilities in diary systems to improve the business efficiency
- Recommend training to users on the improvements made to diary systems.



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# Diary system

Back to Site ▸ Virto Calendar for SharePoint Online

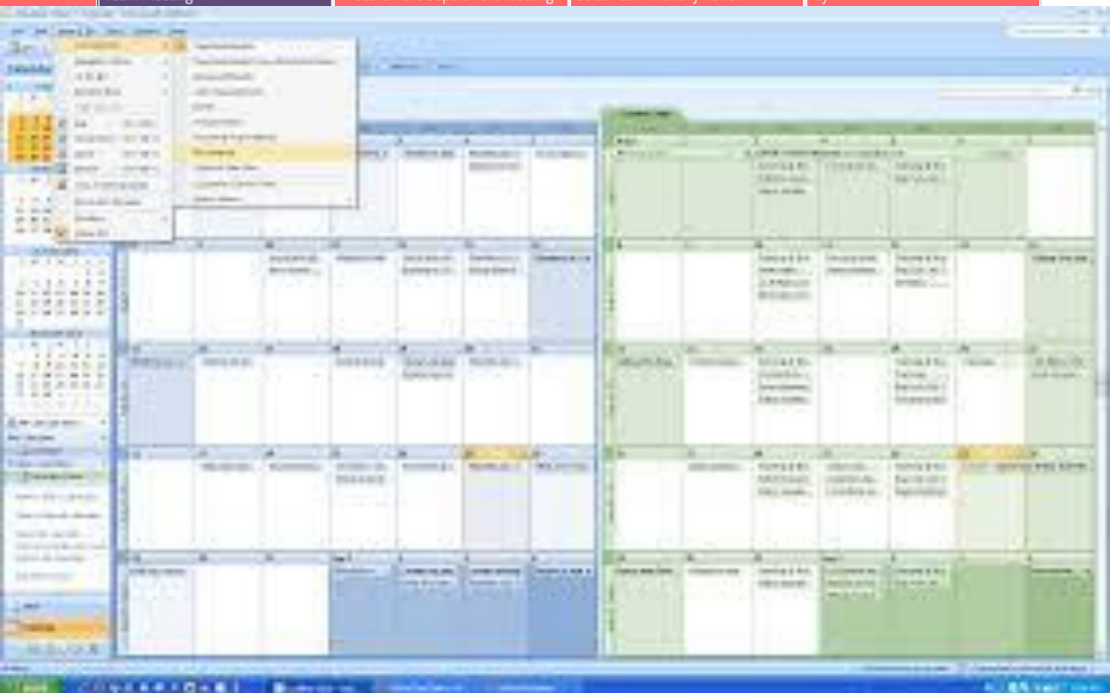
Virto Calendar ▾

TODAY ◀▶ 01/31/16 - 03/12/16

Month ▾

Exchange Calendar Events Tasks Meetings

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
31 Anniversary party Conference	FEB, 1 Lunch w/CEO + more 1	2 Meeting with clients Training course Marketing Team Meet Important Meeting + more	3 Team meeting	4 Procurement Department Meeting	5 Sales Team Monthly Review	6 Gym
14 Birthday party	15 Meeting with client	21 Monthly Meeting	22 Discuss Workflows Conference	28 Team meeting	29 Buy tickets Meeting with support	



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## Users expectations:

- Always up to date and synchronized
- Provides just the right ammount of information needed (dependent of the users needs)
- Enables shaing and privacy both at the same time



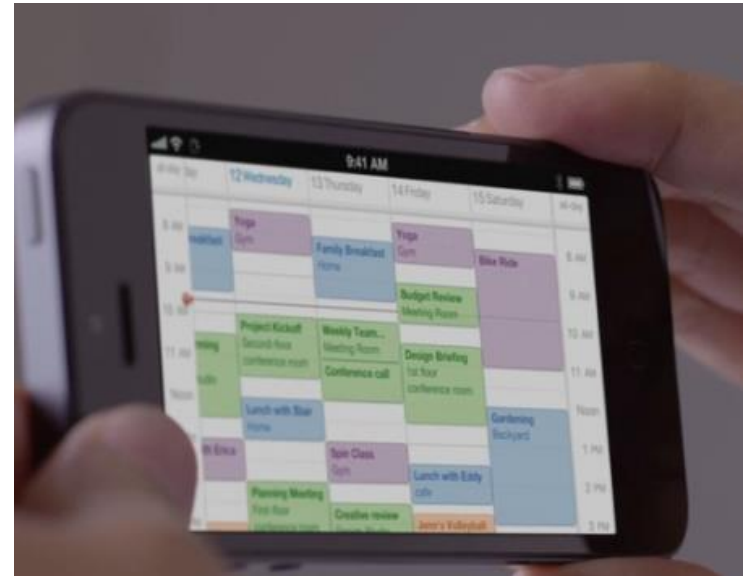
# Effective diary system



## Users expectations:

- Automated backup in case of system failure
- Accessible online and offline as well
- Enables management of the resources

+ PORTABILITY



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# Factors affecting effectiveness

- **Compatibility** with other company's software and hardware
- Initial **set up** of the system



# Factors affecting effectiveness



- But mostly

## HUMAN FACTOR

- Ability to use the system in terms of technical knowledge
- Accuracy of entries
- Respecting the procedures





# Factors affecting effectiveness



## • HUMAN FACTOR



Solution: Additional training whenever needed!



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## How to find out the needs and requirements for the system?

### GROUP DISCUSSION



## How to find out the needs and requirements for the system?

- **Observation** (do people complain about the system? Are they using the diary with difficulties?)
- **Asking questions** (Interviews, Questionnaires)
- **Analysis of company processes** (does the current system fit in and support the company processes?)



# Current diary system analysis



The tool you use should contain questions to be able to list

- **Strenghts and advantages**
- **Drawbacks and disadvantages**

of the current calendar system!



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# Methodological tool



Comparing different users needs

- EUPA\_LO\_108\_M\_001



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## PA and the calendar system

- Needs active access to calendars of people she works for (being able to edit)
- Needs passive access to calendars of other colleagues (see their events)
- Is the one that manages resources for others
- Needs to be an expert on the system





## Manager and the calendar system

- May require PA to completely manage his calendar or only manage certain type of events
- May create windows for certain type of events for PA to fill in (ie schedule meetings)
- May want to analyze the allocation of time of his subordinates
- May need reminders or documents related to meetings inserted directly in the diary





## Business developer and the calendar system

- Needs the calendar merely for meetings organization and follow up activities
- May require a PA to fill the windows for meetings
- May require travelling and resource organization



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## Different types of companies may have different requirements based on:

- The number of employees
- The number of resources they need to manage
- The Industry
- Number of branches/locations
- Existing business processes



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- **Review Question 1**
  - What are the expectations of a company for an effective diary system?
- **Review Question 2**
  - List factors that affect the effectiveness of the diary system
- **Review Question 3**
  - How can you find out information for the analysis of the diary system? List possible methods





The most important factor that affects the effectiveness of diary systems is  
**THE HUMAN FACTOR**

Each company may have different expectations from diary systems, and sometimes the conditions change therefor it should be regularly monitored for effectiveness and changed when needed



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# Well Done!

## You have completed this unit



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