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COURSE BROCHURE

Advanced Office Professional and Records Management Training

1 – 12 March 2027
New York

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Registered in the United Kingdom and Saudi Arabia

Advanced Office Professional and Records Management Training

Ref: 223_6897 **Date:** 1 – 12 March 2027 **Location:** New York **Fees:** 14000 GBP

Office Professional and Records Management is a 2-week advanced training course for senior office professionals, executive administrators and office managers, in which each participant produces an Office Records and Filing Playbook for their department. Executive offices now juggle email, shared drives, board papers and confidential correspondence at a pace that buries decisions when files cannot be found. Jupiter Prime Training delivers this course for experienced administrative professionals.

Why Office Professional and Records Management Matters Now

Three shifts are changing the executive office. Hybrid working has scattered correspondence across inboxes, messaging channels and personal folders, so the official copy of a decision is often unclear. Leaders expect their offices to brief them instantly, retrieve precedents and protect confidential papers from accidental sharing. Meanwhile auditors and legal advisers increasingly ask administrative staff to produce minutes, approvals and letters as evidence. Offices with disciplined filing respond in minutes and protect their principals; disorganised ones lose time, duplicate effort and expose sensitive material. The course draws on ISO 15489-1, the international standard for records concepts and principles, adapted to everyday office practice.

Who Gains Most from Office Professional and Records Management

- Professionals who run the diary, correspondence and papers of a senior executive
- Administrators who coordinate board and committee meetings, agendas and minutes
- Managers responsible for office procedures, shared drives and filing discipline
- Coordinators who handle incoming mail, registers and response tracking
- Office leads who supervise junior administrative staff and their records habits

A directorate or chief executive's office gains most when its executive assistants and office manager attend together and leave applying one folder structure, one naming convention and one correspondence log.

Office Professional and Records Management Capabilities

The capabilities move from the single letter on a desk to the filing discipline of a whole executive office.

- Design a departmental folder structure and file-naming convention — the office manager and department head
- Apply correspondence registration and follow-up tracking for incoming and outgoing letters — senior executives awaiting replies
- Build agenda packs, minutes and action logs that serve as reliable meeting records — board secretaries and committee chairs
- Specify access, confidentiality and sharing rules for sensitive office papers — legal and compliance advisers
- Weigh what to keep, archive or destroy using simple retention rules — records officers
- Communicate office procedures to colleagues through concise guides and induction — new administrative staff

Key Office Professional and Records Management Terms

- Correspondence register — a log of incoming and outgoing letters recording reference, sender, subject, owner and response status.
- Naming convention — an agreed pattern for file and email titles so anyone can identify content and version without opening it.
- Action log — a running list of meeting decisions and tasks, each with an owner and due date.
- Bring-forward system — a reminder method that returns a file or task to attention on a set day for follow-up.
- Official copy — the single authoritative version of a document that the organisation treats as its record.
- Confidentiality marking — a label showing how sensitive a document is and who may see or share it.

Office Professional and Records Management Day by Day

Day 1: The Modern Executive Office

- Role Map of the Executive Office — Gatekeeper, Coordinator and Information Hub
- Information Flows Around a Senior Leader — Where Papers and Messages Enter
- Records Concepts From ISO 15489-1 — Why Office Papers Become Evidence
- Common Office Failure Points — Lost Approvals, Duplicates and Version Confusion
- Personal Workload Audit — Time Spent Searching Versus Deciding

Day 2: Correspondence Control

- Incoming Mail Triage — Action, Information or Filing Routes
- Correspondence Register Design — References, Owners and Status Fields
- Outgoing Letter Standards — Templates, Signatures and Copy Lists
- Response Deadline Tracking — Bring-Forward and Escalation Reminders
- Email as Correspondence — Deciding Which Messages Become Records

Day 3: Meetings and Their Records

- Agenda Pack Assembly — Papers, Deadlines and Circulation Lists
- Minute-Taking Techniques — Decisions, Actions and Dissent
- Action Log Maintenance — Owners, Due Dates and Status Updates
- Resolution Registers for Boards and Committees — Traceable Approvals
- Virtual Meeting Records — Recordings, Chats and Shared Files

Day 4: Paper Filing Systems

- Physical File Classification — Subject, Function and Numeric Schemes
- File Covers, Indexes and Movement Cards — Knowing Where a File Is
- Secure Cabinets and Clear-Desk Practice — Protecting Sensitive Papers
- Archive Box Preparation — Labelling and Transfer Lists
- Space Planning for Office Storage — Active, Semi-Active and Archive Zones

Day 5: Digital File Organisation

- Shared Drive Folder Structures — Mirroring Departmental Functions
- File-Naming Conventions — Dates, Versions and Subject Codes
- Version Handling — Drafts, Final Copies and Superseded Files
- Collaboration Platforms and Team Sites — Permissions and Ownership
- Search Techniques and Metadata Tags — Finding Files in Seconds

Day 6: Confidentiality, Access and Information Security

- Confidentiality Classification Labels — Public, Internal, Restricted and Secret
- Access Rights for Executive Folders — Need-to-Know Principles
- Secure Sharing of Board Papers — Encryption and Expiring Links
- Handling Personal Information in Office Files — Minimising Exposure
- Incident Response for Misdirected Emails — Containment and Reporting

Day 7: Keeping, Archiving and Destroying Office Records

- Office Retention Rules — How Long Common Papers Are Kept
- Archiving Closed Files — Transfer to Records Centres
- Secure Destruction Methods — Shredding Logs and Approvals
- Vital Office Records — Signed Agreements, Delegations and Policies
- Scanning Paper Backlogs — Quality Checks and Indexing

Day 8: Office Productivity and Professional Practice

- Diary and Priority Management for Principals — Protecting Decision Time
- Briefing Note Writing — One-Page Summaries for Leaders
- Stakeholder Communication Etiquette — Tone, Timing and Discretion
- Office Procedure Manuals — Documenting Recurring Tasks
- Delegation and Supervision of Junior Staff — Checking Records Quality

Day 9: Improving Office Information Practice

- Office Records Health Check — Sampling Folders and Registers
- Retrieval Time Tests — Measuring Speed to Find Key Papers
- Change Planning for Filing Habits — Winning Colleague Buy-In
- Induction Guides for New Administrators — Consistent Habits From Day One
- Simple Performance Indicators — Overdue Replies and Unfiled Items

Day 10: Practising the Office Records and Filing Playbook

- Correspondence Simulation — Applying Day Two Registration to a Healthcare Director's Inbox
- Board Meeting Exercise — Applying Day Three Minutes and Action Logs
- Shared Drive Redesign — Applying Day Five Structures to a Bank Department
- Confidentiality Walk-Through — Testing Labels and Access Against Scenarios
- Office Records and Filing Playbook — Structures, Registers, Rules and Guides

Applying Office Professional and Records Management After the Course

- Restructure one shared departmental folder using the agreed naming convention and move or archive every misplaced file within it.
- Introduce a correspondence register and bring-forward routine for the executive's inbox and report overdue replies weekly to the principal.

Office Professional and Records Management Questions FAQ

What is office professional and records management and why does it matter now?

Office professional and records management combines executive office skills with disciplined filing, correspondence and meeting records. It matters now because hybrid working scatters information and leaders expect instant, confidential retrieval of decisions and papers.

Which roles gain most from office professional and records management training?

Senior office professionals, executive administrators and office managers gain most. They control correspondence, meetings and shared files for leaders, and need consistent methods that colleagues can follow.

How does an office professional and records management course differ from a corporate records management course?

An office professional and records management course works at the level of the executive office: diaries, letters, minutes and shared drives. A corporate records course designs organisation-wide retention schedules, classification schemes and records systems.

What do you bring back from office professional and records management training?

You bring back a departmental playbook with folder structures, naming rules, registers and confidentiality labels. You also return with practical minute-taking, correspondence tracking and archiving routines.

Office Professional and Records Management: The Way Forward

The Office Records and Filing Playbook defines how the department files, names, registers and protects its papers and messages. Its first use is deciding how the executive's correspondence and meeting records will be handled from the following week, agreed between the office manager and the principal. Revisit its confidentiality and archiving sections after the first quarter, when real retrieval requests show what works.