

Enhancing Business Office Efficiency

Using technology and best practices to create capacity in the school business office

What a Process Map Should Include

- Start with a clear objective
- Identify all stakeholders
- Map the current process
- Identify inefficiencies
- Document the improved process
- Communicate the changes
- Monitor and adjust

A Trick That Works: Map the 'Real' Process

Always map what actually happens in practice, not just the official policy. This approach reveals true inefficiencies and hidden workarounds.

Technology Isn't the Solution

Technology is a tool, not a solution. It can help solve problems, but it can't solve them on its own. Focus on the process first, then look for technology solutions.

Automation Opportunities

- Repetitive tasks
- Data entry
- Document management
- Workflow automation
- Reporting and analytics

SOPs: Your Future Self Will Thank You

- Standardize processes
- Reduce errors
- Improve consistency
- Facilitate training
- Increase accountability

Cross-Training = Risk Reduction

- Build redundancy
- Increase flexibility
- Reduce dependency
- Improve knowledge sharing

Efficiency and Compliance Can Work Together

- Streamline processes
- Automate compliance
- Use technology
- Regular audits

Common Mindset Traps

- "We've always done it this way"
- "It's too expensive"
- "We don't have the time"
- "It's too complicated"

Discussion Prompts

- What process changes do you think will have the most impact?
- How can we better leverage our technology?
- What are the biggest barriers to efficiency?
- How can we better manage our time?
- What are the biggest risks to efficiency?

Contact Information

For more information, contact [Name] at [Email/Phone].

Why This Matters Right Now

- ➔ Staffing shortages and retirements are increasing pressure.
- ➔ Growing compliance and reporting expectations demand more time.
- ➔ Same workload, but fewer hours available for core tasks.
- ➔ Efficiency is crucial for survival and maintaining staff well-being.

What Efficiency Actually Means

- ➔ Operational efficiency focuses on doing work with less waste.
- ➔ It's about fewer steps and less rework, not just speed.
- ➔ Effectiveness ensures correct and desired outcomes.
- ➔ Compliance means performing tasks in the right way, every time.

The Goal: Creating Capacity

➔ The ultimate aim is to create additional operational capacity.

➔ Efficiency frees up time to strengthen internal controls.

➔ It improves customer service for staff and departments.

➔ This capacity helps reduce audit issues and staff burnout.

➔ Allows more focus on strategic forecasting and planning.

Common Sources of Lost Time in Business Offices

- Duplicate approvals leading to unnecessary delays.
- Waiting for essential information or sign-offs.
- Manual rekeying of data between different systems.
- 'Workarounds' that become permanent, inefficient processes.
- Too many handoffs between individuals or departments.
- Exception-heavy and paper-based processes.

The CBOK Mindset (Simple Version)

The process improvement cycle



Document

Clearly map out existing processes as they truly are.



Analyze

Identify bottlenecks, risks, and areas for improvement.



Improve & Automate

Standardize processes and automate repetitive tasks where possible.



Monitor & Sustain

Continuously track performance and ensure improvements are maintained.





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Continuously track performance and ensure improvements are maintained.

Process Ownership (A Hidden Superpower)



Keeps process documentation current and accessible.



Monitors cycle time, identifies issues, and tracks performance.



Ensures internal controls are functioning as intended.



Trains others and facilitates essential cross-training.

The Power of Process Mapping

- ➔ Makes invisible work visible, improving clarity.
- ➔ Reveals bottlenecks and redundancies in workflows.
- ➔ Supports effective training and succession planning.
- ➔ Improves consistency across various departments.
- ➔ Highlights risk points and control gaps for mitigation.

What a Process Map Should Include

- Individual steps in the workflow.
- Key decision points and alternate paths.
- Handoffs between different roles or departments.
- Systems and tools utilized at each stage.
- Required approvals and their stages.
- Potential time delays (optional but powerful insight).

Process Mapping Example: Time Worked to Paycheck

- Hourly employee fills out a time card/Salaried employees note PTO
- Building secretary or supervisor reviews and approves
- Payroll enters time into the payroll system
- Business office reviews coding/budget
- Payroll is processed and pay is issued
- Adjustments/corrections are made if necessary

Where This Process Usually Breaks

- Unclear "who approves what"
- Late submission from buildings
- Missing documentation
- Manual rekeying between HR/
payroll/accounting
- Retroactive changes
- Staff chasing information instead of
processing



Controls vs Bottlenecks

Good Control

- HR confirms pay aligns with contract
- Supervisor verifies hours/extra duty
- Segregation of duties between setup and approval
 - Payroll register review before processing

Bad Control

- Requiring multiple approvals with no defined thresholds
 - Waiting for signatures when electronic approval is acceptable
 - Duplicate reviews of the same information
- Approvals happening after payroll is already processed

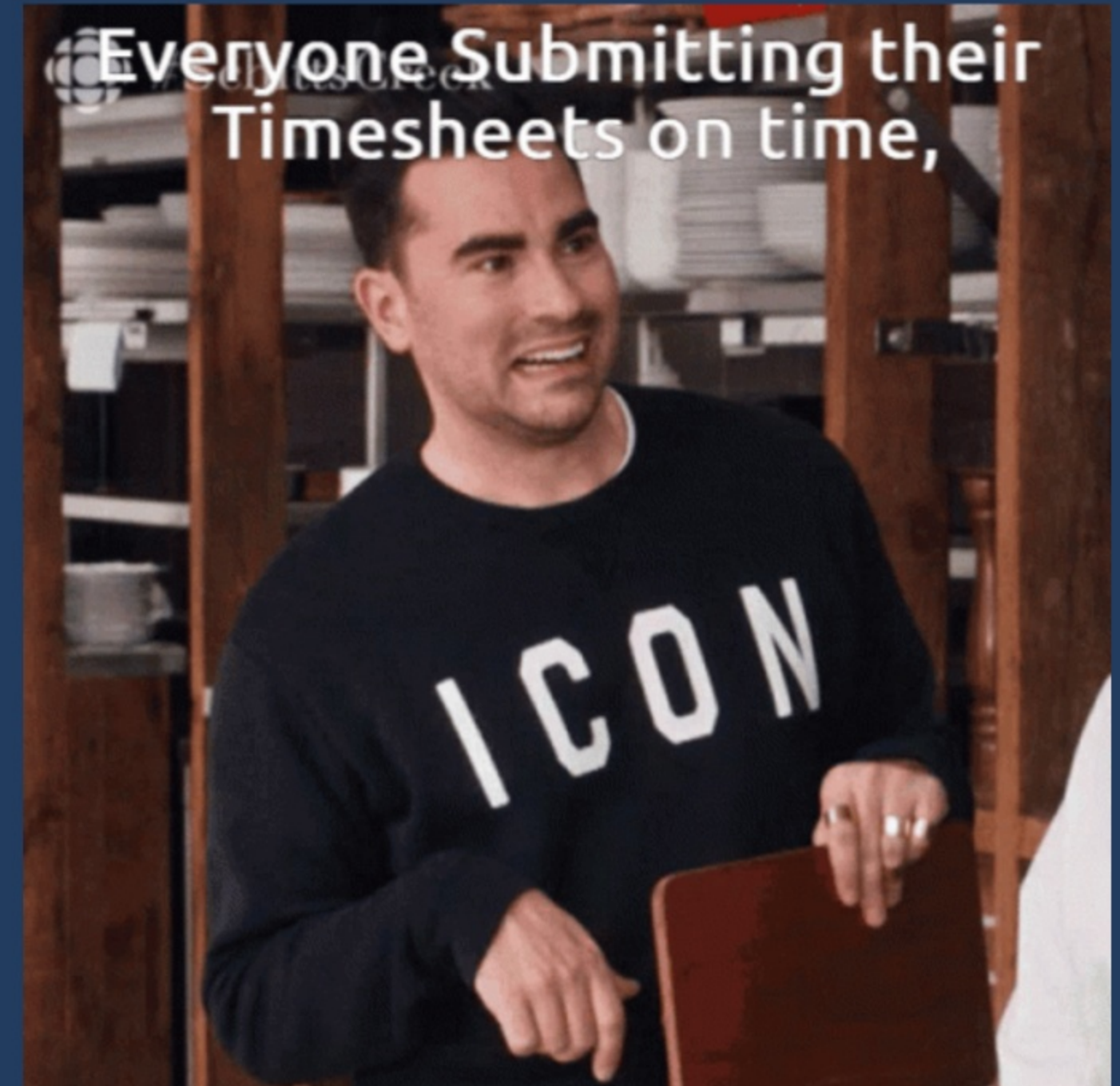
Payroll Mapping Payoff: What to Look For?

- Where delays occur (handoffs, missing forms, unclear ownership)
- Where errors are introduced (manual rekeying, inconsistent coding)
- Where approvals are redundant
- Where communication breaks down
- Where documentation is inconsistent



Payroll Efficiency Improvements

- Standard payroll change form (single intake point)
- Clear cutoff calendar for submissions
- Electronic routing/approval (even if via email or SharePoint)
- Standard documentation checklist by change type
- Cross-training for payroll processing and backups
- Monthly audit of position coding / stipends
- Clear communication loop: “change received / approved / processed”



Quick Poll: What's Your Biggest Bottleneck?

➔ Purchasing/Accounts Payable (AP).

➔ Payroll processing challenges.

➔ Budgeting & amendments.

➔ Grants reporting and compliance.

➔ Cash receipts / student activity funds.

➔ Year-end close procedures.

Process Mapping Tools (Keep it Simple)

- ➔ Digital tools like Visio or Lucidchart.
- ➔ Common office software like Excel or PowerPoint.
- ➔ Low-tech options: sticky notes on a wall.
- ➔ Whiteboard photos for quick capture.
- ➔ Key principle: simple beats perfect for practical adoption.

A Trick That Works: Map the 'Real' Process

Always map what actually happens in practice, not just the official policy. This approach reveals true inefficiencies and hidden workarounds.



Technology Isn't the Solution

Technology is a powerful tool, not the strategy itself. A bad process automated simply becomes a faster bad process. Focus on process first.



Inventory Your Systems

- Accounting/ERP system.
- Payroll system and HR system.
- Purchasing platform.
- Timekeeping solutions.
- Bank portals and grant reporting tools.
- Spreadsheets and 'shadow systems'.

Do Your Systems Talk?

- Are we rekeying the same data multiple times across systems?
- Is data consistent and accurate across all platforms?
- Can exports/imports be automated to save time?
- Do we frequently rely on manual reconciliations?

Decreasing Systems = Increasing Efficiency

- Too many systems lead to data duplication.
- Increased training challenges for staff.
- Results in inconsistent and unreliable data.
- Creates a heavy reconciliation burden.
- Raises the question of 'which report is right?'

Standardization Is the Real Efficiency Hack



Standardized forms simplify data collection.



Consistent coding guidance prevents errors.



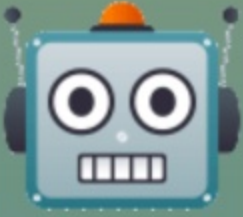
Standardized submission deadlines ensure timely input.



Consistent documentation requirements streamline processes.

Automation Opportunities

What about AI?



Effective Use

- Drafting a first-pass process map outline (steps + decision points)
- Creating SOP templates and checklists
- Summarizing interview notes from staff into "current state" workflows
- Identifying likely bottlenecks (handoffs, approvals, rework loops)
- Generating improvement ideas ("future state" options)
- Writing consistent process documentation language
- Creating training aids ("how to" summaries for new staff)

AI DOs & DON'Ts

DO:

- Use AI to create drafts, checklists, templates, and workflow diagrams
- Keep prompts general (e.g., "payroll change workflow")
- Validate outputs with the people doing the work
- Use AI to standardize wording for SOPs and internal procedures
- Treat AI as a brainstorming partner, not a final answer
- Keep a version history (what changed and why)

DON'T:

- Enter confidential student data or employee information
- Upload payroll reports, vendor invoices, or HR documentation into public AI tools
- Assume AI understands Michigan school requirements or your district policies
- Use AI output without review (AI can be confidently wrong)
- Let AI redefine controls without compliance review
- Replace segregation of duties with "the AI said it's fine"

Rule of Thumb: If you wouldn't email it to the wrong person, don't put it in an AI prompt.

➔ Recurring journal entries for routine transactions.

➔ Electronic approvals for quicker sign-offs.

➔ Standardized workflows for reimbursements.

➔ Automated bank feeds for reconciliation.

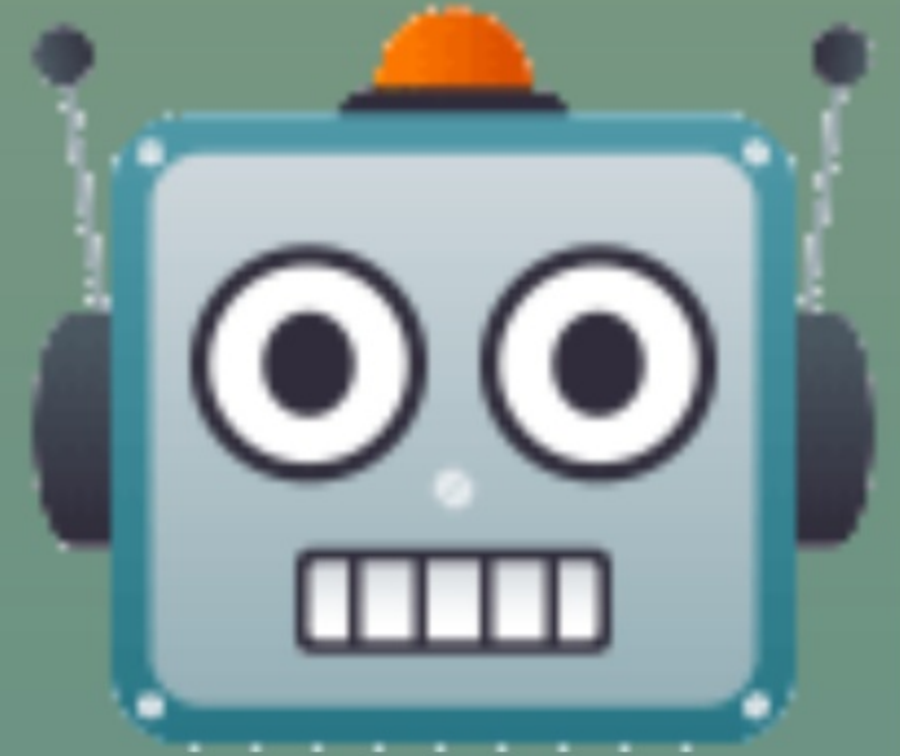
➔ Invoice scanning tools for digital capture.

➔ Automated reminders for close tasks.

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Cross- Training = Risk Reduction

→ Prevents operational stoppages when staff are absent.

→ Eliminates 'only one person knows how' bottlenecks.

→ Reduces year-end panic and workload spikes.

SOPs: Your Future Self Will Thank You

- Keep Standard Operating Procedures (SOPs) short and visual.
- Include screenshots for clarity and easy reference.
- Detail who, when, and where actions occur.
- Update SOPs annually to reflect current practices.
- Store them in a shared, easily accessible location.

Efficiency and Compliance Can Work Together

→ Clean documentation leads to fewer audit requests.

→ Consistent coding results in fewer audit adjustments.

→ Clear approvals reduce audit findings.

→ An organized close checklist prevents surprises.

Measurement: What Gets Measured Gets Improved

- Invoice cycle time from receipt to payment.
- Number of invoices paid late.
- Number of journal entries posted after close.
- Number of corrections/ reclassifications required.
- Time to complete month-end close processes.
- Number of 'emergency checks' issued.

Year-End Close: The Ultimate Stress Test

- ➔ Frequent last-minute adjustments.
- ➔ Missing documentation causing delays.
- ➔ Unclear grant balances and reporting.
- ➔ Inconsistent building submissions.
- ➔ Delayed accrual decisions impacting financial accuracy.

Quick Wins: What You Can Do in 30 Days

- Map one key process (e.g., AP, payroll, cash receipts).
- Create a comprehensive close checklist.
- Eliminate one redundant approval step.
- Standardize one frequently used form.
- Identify one spreadsheet that can be replaced or automated.
- Assign one 'process owner' to a key workflow.

The 'Efficiency Champion' Concept



Gathers and prioritizes improvement ideas from the team.



Keeps Standard Operating Procedures (SOPs) updated.



Leads quarterly review discussions on process effectiveness.



Tracks 2-3 simple metrics to monitor progress.

Common Mindset Traps

➔ 'That's how we've always done it' – resisting change.

➔ 'We don't have time to fix it' – perceived lack of resources.

➔ 'Our software can't do that' – limiting technology assumptions.

➔ 'We tried once and it didn't work' – fear of past failures.

➔ 'We can't change because of audit requirements' – often a misconception.

Discussion Prompts

➔ What process consumes the most time each month in your office?

➔ Where do you consistently observe the most rework?

➔ What is your most common 'missing documentation' issue?

➔ If you could eliminate one step from a process, what would it be?

➔ What's one process you would like to see documented this year?

Key Takeaways

- Fix the process before attempting to automate it.
- Standardization is crucial for reducing rework and errors.
- Process mapping reveals bottlenecks and critical risks.
- Process ownership ensures sustainability of improvements.
- Small, consistent improvements create significant capacity.



Questions & Answers

We're here to address your insights and discuss how to apply these strategies effectively in your business office.



Contact Information

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- Start with a clear purpose
- Identify all steps and tasks
- Assign responsibility for each step
- Document the process in a clear, concise manner
- Review and update the process regularly

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SOPs: Your Future Self Will Thank You

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- Increase accountability

Cross-Training = Risk Reduction

- Increase staff flexibility
- Reduce dependency on individuals
- Improve knowledge sharing
- Enhance team resilience

Efficiency and Compliance Can Work Together

- Streamline processes
- Automate repetitive tasks
- Implement robust controls
- Regularly review and update procedures

Common Mindset Traps

- "We've always done it this way"
- "It's too expensive"
- "We don't have the time"
- "It's too complicated"

Discussion Prompts

- What process changes do you think will have the most impact?
- How can we ensure that our staff is equipped with the necessary skills to implement these changes?
- What are the potential risks of not implementing these changes?
- How can we measure the success of these changes?

Contact Information

For more information, please contact [Name] at [Email/Phone].

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