

Workflow: Procurement

Toolkit 11.1

Administrative Excellence

target audience

Owners, managers, and administrators.

what it is

Administrative excellence covers all administrative elements of a business, including all records, reports, accounts & finance, human resources records, audits, and information. However, the key aspect of administrative excellence is the importance of **having easy and immediate access to the information you need, to manage your business when you need it**. In short, administrative excellence is the result of a process flow (entailing discipline, completeness, accuracy, timeliness, and good practice) that ensures that you have the required information when you need it, and when others (including 3rd parties, e.g., certification bodies) may need it.

The focus in this toolkit is more on the process and practice, rather than a list of administrative tasks or records.

why it is important

The ability to answer yes to all of the following questions is of the utmost importance:

- Do you know your numbers, i.e., the measures and metrics, data, and management information, that drive your business?
- Do you own your numbers, i.e., you have access to the data, even if you were to change service providers who process/manage the data (e.g., accountants, service providers, market agents etc.)?
- Do you use the information effectively, i.e., analyse, interpret, communicate/share, and act upon it?

It is unlikely that anyone becomes goes into business because they want to be an administrative wizard, but poor administrative practice is a very real threat to your business; at the very least, poor administrative practice can significantly limit your ability to grow and compete professionally. Your aim is also to be professionally competent in the administrative side of your business and to own and use your data and information to improve and to grow.

success factors

- **Completeness** – There are three types of administration which you should master:
 1. General administrative good practice and compliance – This includes administrative processing which any business is required to do, such as:
 - Accounts.
 - HR and payroll.
 - Health and safety records.
 - Statutory reporting.
 2. Administrative compliance specific to the citrus sector – The citrus industry, including the various export markets, places sector-specific and ever-changing administrative demands on the packhouse, such as:
 - Chemical specification and calibration records.
 - Records related to materials such as cartons and pallets.
 - Data required by audits and certification bodies.
 - Data on energy and water use in terms of sustainability requirements.
 - Management of retention samples and the necessary records.
 3. Operation specific – You and your management team require information specific to your operation that enables you to manage effectively, such as:
 - Run rate reports.
 - Daily packing records.
 - Dwell times.
 - Water and power use.
 - Attendance records.
 - Losses and indicators of recurring problems.
 - Etc.
- **Integrated and limited duplication** – Ideally, the administrative and data management requirements of the three above categories (internal and external) should be integrated wherever possible to limit duplication of effort and multiple data entry.
- **Clear data and information definitions** – Data management and processing rules have been developed to ensure that data is captured, interpreted, and communicated in a consistently comparable manner. Compliance to a clearly defined convention and process is vital to ensure that ERP or other integrated systems can process and analyse the data most effectively.
- **Clearly defined process** – Understanding the administrative and information requirements (**What**) will determine the process and practice to meet those requirements, i.e., the **"How"**. The administrative processes need to be mapped with most critical information given priority, and with clearly allocated accountability (**Who**).
- **Availability** – Information needs to be available at the right time (**When**) with a robust process and system to prevent incomplete or late information. Administrative work scheduling

has been done to ensure timeliness all administrative work and that it fits into the operational and review timetable of the business.

- **Communication** – Information needs to be communicated in a way that makes it useful, i.e., the quality of reporting and presentation is important.
- **Good record keeping and administrative 5S (neatness and discipline)** – Reliable and secure recordkeeping is important. This includes:
 - Filing that is logical, chronological, and easy to access whether in paper or in digital format.
 - Compliance to security and information protection requirements (POPI).
 - Secure back up of all information in case of loss. A non-negotiable protocol of regularly (e.g., every Friday) backing up all data and information off-site, either on an external hard drive, a cloud-based repository, or both, must be implemented.

execution steps

1. Define all your data and information requirements. This includes the data definitions and the rules and assumptions informing the data.
2. Map your administrative process, working with a schedule of when you need information and what the process is to deliver it on time. This includes clearly allocating who is accountable for gathering, processing, presenting/communicating, and filing the information.
3. Analyse the gaps between the information you have and the information you need, including how comprehensively it should be presented, and analyse the gaps in your process and your resources to complete the necessary process. It is unlikely that a packhouse will have all the resources required in-house. Nonetheless, do this gap analysis and think how you can still establish the necessary systems to meet your administrative and data requirements. (Refer to [Toolkit 1.2 – Organisational Structure and Capability](#)).
4. Standardise all administrative work (Refer to [Toolkit 3. 6 – Standard Work](#)) and create SOPs regarding data processing, preparation for audits etc.
5. Ensure that all the administrative process flows are documented and fully functional, especially with regard to regulatory and export compliance (agrichemical applications, phytosanitary risk management records, etc.).
6. Compile KPIs for administrative and data management deliverables and assess the effectiveness of your administration with the view to continuous improvement.
7. As you improve, integrate your internal and external administrative and data management processes to minimise duplication of effort and multiple data entry. Use systems that have a proven track record in your industry.
8. Ensure that your administrative processes deliver the reporting and management information required to manage your operation and your business, whether this is information you require on a daily, weekly, or monthly basis.
9. Apply 5S (neatness and discipline) to your administration, i.e., filing, records, archiving etc.
10. Ensure that your back up protocols and systems are in place and strictly adhered to. Ideally this should be automated.

assessment questions

Please Note: There is no minimum / maximum number of questions you can add.

1.	Are all your administrative and data management requirements defined?
2.	Are your key administrative processes mapped, showing how and when they deliver data and information?
3.	Have you assessed the gaps in your administrative processes and have a plan to systematically address these shortcomings?
4.	Is accountability for each administrative process clearly allocated?
5.	Where a service provider is doing the administration and generating data and reports, should and does the packhouse have full access to that data and own the data and information?
6.	Is administrative work standardised with the required SOPs?
7.	Have KPIs been defined that enable you to assess the performance of the administrative functions and activities?
8.	Are you using appropriate technology and systems that improve the efficiency and integration of your administration and data capture?
9.	Does your administration meet the requirements of 5S (neat and well organised)?
10.	Are your back up protocols in place and strictly applied, i.e., at least weekly?

resources

1.	Data / Admin Process Flow Example
----	---