



Touching lives

2011 | Tuscaloosa, Alabama

# LEAN OFFICE CERTIFICATE PROGRAM



*Take advantage of our new lower fees for these courses!*



**Records Management**



**The Lean Office: Setting the Stage for Productivity Improvements**

[training.ua.edu/leanoffice](http://training.ua.edu/leanoffice)



THE UNIVERSITY OF  
**ALABAMA**  
CONTINUING STUDIES

*Touching lives. Creating opportunities.*

# LEAN OFFICE CERTIFICATE PROGRAM

## Lean for Transactional, Service and Administrative Operations: Driving Lean Practices into the Administrative Office

Lean is not just for manufacturing anymore! This certificate program is designed for those who want to improve efficiencies in the office environment. Enormous amounts of waste exist in the office and service environments. Delays, bottlenecks, errors, redundancy and work-arounds are very common. This can lead to low employee morale and stall work in other areas. Non-value work can be as high as 70%!

In this program, you will learn how to use Lean concepts to identify and eliminate waste within your office's transactional and administrative processes. Using Lean principles, you will be able to reduce inefficiency and waste in the office and provide a more satisfying environment for your workforce.

### Who Should Attend

This program is intended for any manager, professional, or office employee interested in improving the effectiveness and efficiency of your office or service operations. Examples of industries that have implemented these concepts are Hospitals, Higher Education, Government, Banking, Human Resources, Sales and Marketing, Purchasing, Finance, Accounting, and many more.

### Certificate Program Requirements

The **Lean Office Certificate Program** can be completed by taking the following courses within two years of the time the certificate program is begun.

<b>Lean Office Concepts for Enhanced Productivity</b>	March 3, 2011
<b>The Basics of Records Management</b>	March 29-30, 2011
<b>Records Retention Scheduling</b>	March 31, 2011
<b>Advanced Practices in Records Management</b>	September 20-21, 2011



# LEAN OFFICE CERTIFICATE PROGRAM

## The Lean Office: Setting the Stage for Productivity Improvements

What is a “Lean Office?” Imagine an office environment free of wasted effort and increased productivity. Imagine an office environment that is efficient and has high employee morale and low turnover—an office that is thriving! Imagine very satisfied customers and well-organized office practices. The University of Alabama’s Lean Office program will help turn these imaginings into reality.

The Lean Office is an information-packed one-day program that will enable participants to apply lean principles to the office environment; provide plans for eliminating waste and focus efforts on value-added activities. Lean Office students will discover ways to speed up their operations by eliminating the time that work products sit idle and will learn the eight areas of waste and how to avoid them in the office environment.

The **Lean Office** course features a successful, dynamic format to ensure you will gain maximum benefit from your participation:

- Modular learning via narrated slide presentation
- Group discussion
- Participant workbook
- Facilitated practice exercises
- Practical work applications

## Who Should Attend

This course is developed for supervisors, managers, and anyone working in an office setting who wants to create an organized and thriving Lean Office environment!

## Deliverables

- Learned lean approach
- Applied knowledge of how to set up a lean office environment
- Learned way for cross-functional teams to communicate and effectively coordinate their improvements

## Program Components

- Overview of Lean - History, Benefits, Tools...Lean vs Six Sigma
- Office Work as a Process Flow
- Office Areas of Waste - Eight Wastes Common to any Type of Business
- 5 S- A System for Cleaning and Organizing Your Work Area
- Just-In-Time (The Pull System) - Producing What is Needed, When It Is Needed
- Kanban - Visual Inventory Control System
- Action Planning for Implementing Your Lean Office - Putting Lean Office Principles Into Practice

# LEAN OFFICE CERTIFICATE PROGRAM

## The Basics of Records Management

A successful Records Management program will enable practitioners to utilize people, tools, and space economically while increasing productivity; promote trust and integrity in situations requiring requests for records or information; and inspire trust in management by exemplifying, through a committed leadership style, the importance of vital records management.

This class will provide participants with a thorough and thoughtful analysis of the following areas:

- Definition of Records Management (RM) and the purpose in having a RM program, regardless of the format of the records
- Concepts of labeling/indexing records, properly filing records, records retention schedules and vital records
- Why retention schedules are key components for the actual maintenance, storage and destruction of records
- Storage systems including the different medias and methods available for maintaining records and retrieving them for customer issues, audits, litigation, regulatory issues, etc.
- The importance of an established records retention program
- The significance of vital records in an organization's disaster plan for business continuity plans



## Deliverables

- The components of a records management program
- The rewards and consequences for having or not having a records management program
- Thorough investigation of proper indexing and filing methods and records storage solutions
- Plan for identification of vital records as part of business continuity plans

## Subjects Covered

Records Management Overview, Labeling/Maintaining Records, Retention Schedules and Benefits, Records Storage & Vital Records (asset & risk management), and Filing/indexing Records

### Tailor-made Training for You

Any of these programs can be tailor-made for your organization and delivered at a location of your choice!

For more information, contact Donna Keene at 205-348-6513 or [dkeene@ccs.ua.edu](mailto:dkeene@ccs.ua.edu).





# LEAN OFFICE CERTIFICATE PROGRAM

## Records Retention Scheduling

The practice of creating and maintaining records retention schedules saves organizations money in several ways—ensuring that records are maintained only as long as they add value or as dictated by business, legal, and regulatory requirements. Money and time are saved by eliminating wasted time, space, and expense in the unnecessary storage of records.

Class participants will:

- Examine the concept and significance of retention scheduling
- Using examples from their own workplaces, create retention schedules and study their application
- Learn how vital records and business continuity fit into retention scheduling
- Become familiar with various records storage options and how to apply retention scheduling with each

## Deliverables

- The ins and outs of the creation and application of retention scheduling
- Examination of different methods for assigning retention schedules
- Analysis of how to store records on site and off site and the proper destruction of records
- Components of identifying vital records and assigning retention schedules

## Subjects Covered

Retention Schedule creation and application, vital records/business continuity and records destruction

---

## Advanced Practices in Records Management

This course will familiarize participants with important records management concepts in areas such as Asset & Risk Management and Records Management Program Development. These advanced concepts will arm managers with tools for ensuring that business will not be lost because of misplaced or destroyed records, while minimizing records maintenance costs and with keys to implementing and maintaining a program for successful records management.

Participants in this class will gain a comprehensive understanding of how to develop and implement a complete records management program and how to implement records management concepts in risk management—including creating a vital records plan and incorporating it into the business continuity/disaster recovery plan.

## Deliverables

- The concepts of identification of vital records
- Step-by-step process of creating a vital records plan
- Analysis of how to incorporate a vital records plan into the business continuity/disaster recovery plan
- Comprehensive outline for developing and implementing a records management program

## Subjects Covered

Asset & Risk Management–Vital Records, Creating a vital records plan, incorporating a vital records plan into the business continuity/disaster recovery plan; components of a complete records management program, including labeling/indexing records, properly filing records, records retention schedules, and storage and destruction of records

# FACULTY INCLUDES

**KAY D. LAWLEY**, has over 15 years' experience in the administration of a corporate-wide records management program (computer generated and hard copy) for business, legal, local, state & federal compliance (includes litigation and anti-trust), business continuity planning (disaster recovery and vital records) and records management training. She has 20+ years of experience in management, internal/external customer service, contract administration, process improvement, data system administration, problem solving and project management as well as developing/maintaining corporate methods and procedures. She has managed profit centers that handled client records and litigation.

Ms. Lawley is former president of the Alabama Chapter for the Association for Information and Imaging Management (AIIM); board member for the Association for Records Managers and Administrators (ARMA); a member of the AIIM Executive Committee Alabama Chapter and the National Association for Purchasing Managers. She is a certified Six Sigma Green Belt.

**DIANNA SMITH, MBA, SIX SIGMA MASTER BLACK BELT**, is Chief Operating Officer and part owner of Donald E. Smith Associates, Inc., a business management consulting firm specializing in process improvement initiatives using Lean Six Sigma Methodology. She is a multi-talented consultant and senior management leader with over 30 years of experience working in industry. She is a dynamic, energetic individual whose expertise in understanding and managing the dynamics of change has saved companies millions of dollars. Ms. Smith is skilled at applying Six Sigma and Total Quality Management principles to corporate process improvement initiatives and meeting facilitation, interventions, project management, team participation, strategic planning, training development and delivery. Dianna delivers Six Sigma Process Improvement courses both Green Belt and Black Belt, Champions Training and numerous leadership courses. She provides application support and coaching of projects. Dianna successfully negotiated with the U.S. EPA regarding environmental self-disclosure issues resulting in a cost avoidance of several million dollars. She successfully managed a massive re-engineering effort to outsource non-core processes for a large telecommunications company resulting in \$22 million saved.

Ms. Smith holds an M.B.A. from the University of Alabama at Birmingham (UAB). She is a Cum Laude graduate of UAB in Business Management. Dianna was selected as one of 2,000 Notable American Women in 1996. She is a recipient of the 2007 Teaching Excellence Award from The University of Alabama, College of Continuing Studies. She is among the first to be certified in The Great Discovery, Coach and Facilitator, The Fourth Generation of Six Sigma in 2008.

**DONALD SMITH, MBA, SIX SIGMA MASTER BLACK BELT**, is the CEO/President and Founder of Donald E. Smith Associates, Inc., an international business management consulting firm specializing in Lean Six Sigma Process Improvement, Total Quality Management, and Leadership Development. Don has extensive experience in directing leadership teams at all organizational levels in the planning, design, and implementation of business process excellence systems, including Six Sigma and Lean Enterprise.

Don is an accomplished and certified Six Sigma Master Black Belt and Black Belt facilitator who has coached process improvement teams at numerous companies across the globe. An active member of the American Society for Quality, Don is a charter member of the Service Industries Division and the Past Regional Counselor for Region 15. He is also a member of the Quality Management Division and the Human Resources Division of the ASQ. Don is a certified Total Quality Management and Quality Action Team facilitator. He has designed and delivered several internal and external workshops stressing TQM awareness and application. At ease in multicultural environments, he has provided services to customers throughout the world.

Mr. Smith holds an M.B.A. from Texas, A&M in Commerce, Texas. He is a recipient of the 2007 Teaching Excellence Award from The University of Alabama, College of Continuing Studies. He is among the first to be certified in The Great Discovery, Coach and Facilitator, The Fourth Generation of Six Sigma in 2008.

# GENERAL INFORMATION

## Registration

The per person registration fee for the programs included in these certificate programs are as follows: 1-day programs, \$595; and 2-day programs, \$995. Fees cover the cost of the sessions, handout materials, refreshment breaks and daily lunches. Lodging is the responsibility of the participant. A 10% discount is available for multiple registrations of 3 or more to any one seminar. (NOTE: Multiple registrations must be processed together for this discount to apply.) A 10% discount is also available for members of the C&BA Commerce Executive Society. Participants who register less than five working days prior to each program date should do so by phone to ensure confirmation of their registration. Treasury regulations may permit an income tax deduction for educational expenses (registration fees, travel, meals and lodging) undertaken to maintain or improve professional skills.

## Certificate Program Requirement Graduation Criteria:

1. Attend all required days of course work within the specified period.
2. Complete all work as assigned.
3. Be present at all class activities. (For a documented emergency a participant can miss up to 1 1/2 hours of the scheduled time and still graduate.)
4. Satisfactorily complete all examinations (70% or better).

## Schedule

Registration/check-in will be from 8:00 to 8:30 a.m. on the first day of each program. Sessions run from 8:00 a.m. to 5:00 p.m. daily with a one-hour break for lunch.

## Continuing Education Unit (CEU) Credit

The CEU (non-credit) has been designed to recognize the efforts made by individuals in approved continuing education programs. The courses have been assigned .7 CEUs for each day of course work. Upon your request and payment of a \$10 fee (per course), you may receive a certificate of completion which identifies the number of CEUs awarded. CEUs will not be awarded for partial attendance.

## Location and Lodging

All programs will be held in the Bryant Conference Center, 240 Bryant Drive, a premier learning facility located on The University of Alabama campus in Tuscaloosa. While at the Bryant Conference Center (BCC), make plans to visit the Paul W. Bryant Museum directly adjacent to the Center. Special conference rates are available at the Hotel Capstone adjacent to the BCC. Rooms may be reserved by calling 205-752-3200 or reserve online at [hotelcapstone.com](http://hotelcapstone.com). On this site, **please use the code "CCS" in the Group Code field and type in the name of the program you are attending to receive your discounted price.** Also, when making your reservation by phone, please mention this program to take advantage of any discounted rates. After registering for the program, you will receive a map with the locations and phone numbers of other Tuscaloosa motels.

## Parking

From I-20/59, take the McFarland Boulevard/US 82 exit and proceed north to the University Boulevard interchange. Exit and turn right. Stay on University Boulevard down the hill and turn left on Second Avenue. Open parking will be on your left, the Bryant Conference Center complex on your right. In addition to the parking lot on Second Avenue, you may also park in the Coleman Coliseum Parking Lot and the Bryant Drive Parking Lot. You will be able to ride a Crimson Route bus from either of these lots to Second Avenue at the Bryant Conference Center. Registered participants will receive upon registration confirmation, a Parking Permit to be displayed inside the participant's vehicle windshield. In the event the Parking Permit is not received prior to parking (in lots mentioned), please call 1-866-432-2015.

## Cancellations and Refunds

If you must cancel, a full refund may be granted up to 10 working days prior to each session's start date. Thereafter, an administrative fee of 25% of the registration fee will be charged against your refund. Refunds cannot be made on the day a program begins, but a substitute participant may be designated. The University of Alabama reserves the right to cancel, postpone or combine class sections, to limit registration or to change instructors. Any money-back guarantee offered on specific programs does not necessarily apply to other programs of The University of Alabama College of Continuing Studies.

## Additional Information

For more information, call Donna Keene at (205) 348-6513; fax to (205) 348-8505 or email: [dkeene@ccs.ua.edu](mailto:dkeene@ccs.ua.edu)

You may write to her at The University of Alabama, College of Continuing Studies, Box 870398, Tuscaloosa, AL 35487-0398.

## Tailor-made Training for Your Organization

These Certificate Programs, or any of their components, can be tailored for your firm or association by The University of Alabama and presented at a site of your choice. The University of Alabama College of Continuing Studies is here to help you tackle your training needs. We are flexible, meeting not only your educational needs, but also your time and location restraints. We use instructors from The University of Alabama and other world-class educational institutions as well as top-notch consultants from around the country, and we have developed training programs for a number of prestigious organizations in the Southeast. For more information about this service, contact Donna Keene at (205) 348-6513 or [dkeene@ccs.ua.edu](mailto:dkeene@ccs.ua.edu)

In order to reach as many interested people as possible, a number of mailing lists have been compiled.

If you receive more than one copy of this brochure, please share it with an interested colleague.



Box 870388  
Tuscaloosa, Alabama 35487-0388

*The University of Alabama is an affirmative action/equal opportunity institution.*

For multiple registrations, please duplicate this form. Brochure ID 14811

☐ Dr. ☐ Mr. ☐ Ms. ☐ Mrs. ☐ This confirms my phone registration  
☐ This confirms my on-line registration

Name First Last M. I.

Preference on Nametag Job Title

Company Phone Email address

Personal Business Phone Fax

Approving Manager

Company/Organization Name

Confirmation Mailing Address

City State Zip

Billing Mailing Address Attn:

Address

City State Zip

#### METHOD OF PAYMENT

☐ Enclosed is a check in the total amount of \$\_\_\_\_\_ made payable to  
THE UNIVERSITY OF ALABAMA.

☐ Charge \$\_\_\_\_\_ to my credit card: ☐ American Express ☐ MasterCard ☐ VISA ☐ Discover

Card # \_\_\_\_\_ Exp. Date \_\_\_\_\_

Authorizing Signature \_\_\_\_\_

## Registration Form

- ☐ **Lean Office Concepts for Enhanced Productivity**  
March 3, 2011 (0514811) \$595
- ☐ **The Basics of Records Management**  
March 29-30, 2011 (0514511) \$995
- ☐ **Records Retention Scheduling**  
March 31, 2011 (0514611) \$595
- ☐ **Advanced Practices in Records Management**  
September 20-21, 2011 (0514711) \$995

### Applicable Fees:

- ☐ \$595/person per session; total sessions marked: \_\_\_\_\_
- ☐ \$535\*/person per session; total sessions marked: \_\_\_\_\_
- ☐ \$995/person per session; total sessions marked: \_\_\_\_\_
- ☐ \$895\*/person per session; total session marked: \_\_\_\_\_

\*(reflects 10% discount as specified below)

- ☐ Organizations sending 3+ persons to the same session in batch registration.
- ☐ Member of the C&BA Commerce Executive Society.

### Optional:

- ☐ CEU Certificate @ \$10 each (for all sessions)

**Note:** The University of Alabama is committed to complying with the Americans with Disabilities Act. Please make your request for accommodation at least 30 calendar days in advance of program date by stating your request here.

---

---


---


---


---


---

#### FOUR CONVENIENT WAYS TO REGISTER

 **Mail form and fee to:**  
Registration Services  
College of Continuing Studies  
The University of Alabama  
Box 870388  
Tuscaloosa, AL 35487-0388

 **Phone in registration to:**  
(205) 348-3000  
Toll Free: 1-866-432-2015

 **On-line registration**  
**available via the internet at:**  
training.ua.edu/lean

 **FAX registration form to:**  
(205) 348-6614

FAX or phone-in registrations must have credit card number and information.