OFFICE MEETING WORKING FORM

Kate

Office processes meeting - 22 July 2026

Meeting date:		**Time:**	
Present:		**Next review:**	

Purpose: a practical discussion to confirm that office work is running properly, identify anything causing delays or repeated work, and agree actions. This is not a formal ISO management review.

1. GENERAL POSITION AND WORKLOAD

The report covers 80 active office processes. Most controls show regular completion, but there are four overdue rolling tasks or audits and several daily tasks still open. The first check is whether this reflects genuine unfinished work or items that have been done but not closed.

Is the office currently working as it should?

[✓] Yes [ ] Mostly [ ] No

What is causing the most delay, repeated work or frustration at present?

Unavoidable customer amends.

Is the workload fairly distributed between the team?

[ ] Yes [ ] Mostly [ ] No

Are urgent jobs and priorities clear each morning?

[ ] Yes [ ] Sometimes [ ] No

Are any completed jobs still showing as outstanding because the issue has not been closed correctly?

2. CURRENT OVERDUE OR CARRIED-FORWARD TASKS

The report shows older open items relating to PayPal checking, credit-card checking, proforma and payment checking, supplier outstanding-order review, and a housekeeping task. These should be checked as practical work items rather than treated automatically as compliance failures.

Are the older PayPal, credit-card or proforma/payment checks actually complete?

Is the supplier outstanding-order review current, and is anything waiting to be chased?

Are any other tasks repeatedly carried forward instead of being completed or formally reassigned?

Does anyone need help, information or authority to clear these items?

3. TELEPHONES, CALL LOGS AND CUSTOMER MESSAGES

Telephone controls are well established. The report requires calls to be answered promptly, logged where needed, and not left waiting too long for a return call.

Are calls being answered promptly throughout the day, including lunch and busy periods?

[ ] Yes [ ] Usually [ ] No

Are telephone messages and call-back requests being entered clearly in Intrastats?

[ ] Yes [ ] Needs improvement

Are any customer calls waiting too long for a response?

Is it clear who should handle each type of enquiry when the usual person is unavailable?

Are there any recurring telephone or call-routing problems?

4. EMAILS, WEBSITE QUESTIONS AND INCOMING ENQUIRIES

The report includes older website-question processes, although one record states that website questions now arrive through Shopify and email. The practical question is whether every enquiry reaches the correct person and receives a timely response.

Are all email, Shopify and website enquiries being seen and answered promptly?

[✓] Yes [ ] Mostly [ ] No

Is any old website-question route still showing items even though it is no longer used?

Are messages being duplicated, missed or sent to the wrong person?

Do we need clearer shared-mailbox ownership or holiday cover?

No - this is one of the first things to be looked at each day.

5. CUSTOMER ACCOUNTS AND CONTACT DETAILS

Adding new Opera accounts is reported as a strong process, with separate checking of recently created accounts. Earlier checks noted that some sales-lead records contained very little information.

Are new customer accounts being created accurately and checked by a second person?

[ ] Yes [ ] Usually [✓] No

As far as I know this is not something we know to do

Are sales leads and new-account records being created with enough information to be useful?

Sometimes relevant customer details ie. job title, department not added

Are delivery, invoice, telephone and email details being kept ~~consistent between Opera and~~ the internal CRM?

? see above

Are there any duplicate, unusable or incorrectly numbered accounts that need correction?

Yes - merge accs not completed

6. SALES ORDERS, CONTRACT REVIEW AND ORDER CHANGES

The report covers order entry, contract review and scheduled OEM orders. JJ-CCR and rEvo should normally have two to four scheduled orders visible, with matching production orders. Some July tasks appear open despite completion notes.

Are current customer orders being entered and checked without avoidable errors?

Yes - but sometimes taking time to process an order would ~~stop~~ allow time to read memos

Are any orders waiting because customer details, prices, stock, delivery instructions or approvals are unclear?

only occasionally, sometimes we have to check a price with SN if memo says so. Sometimes there is a specific price missing - perhaps because not usually sold to eg export

Are late order changes causing duplicated work for the office or warehouse?

Customers change their orders often. Sometimes as late as when goods have been picked/packed - eg 'I don't want EXW', pay for another proforma for carriage (+ extra bank charges)

Are the JJ-CCR and rEvo scheduled sales and production orders current for the coming months?

Not something I keep an eye on

Are any OEM or repeat customers likely to need chasing for forward orders?

not something I do.

7. AWAITING ACTION TRAYS, PRIORITIES AND HANDOVERS

The report includes regular checks of the Awaiting Action ~~tray~~ and Priority 8 items. These controls are intended to stop jobs sitting without ownership or being overlooked during handovers.

Is the Awaiting Action ~~tray~~ list current, with no old items that have lost ownership?

Maybe someone could have an issue to prompt us to chase 8s? (Sarah used to have this)

Are Priority 8 and genuinely urgent items being distinguished clearly from routine work?

✓

When work is handed to another person, is the next action and owner obvious?

Are there any jobs that move back and forth between people without being resolved?

8. DELIVERY NOTIFICATIONS, SHIPPERS AND CUSTOMER UPDATES

The report shows frequent Viamed, VST and Vandagraph delivery-notification tasks, including daily items that may remain open for several days. Check whether notifications are being sent promptly and whether open records accurately reflect the work done.

Are delivery notifications being sent promptly after dispatch for all three companies?

Sometimes we don't know if some can go. We only def. know to push through UPS + R.Mail. Not VST until told to.

Are any notifications delayed because tracking, shipping or customer email details are missing?

Yes

we need to ask always if ok to send VST notifications.

Maybe w/h could push through all that can go?

Are shipper sign-off and collection records being completed and closed correctly?

cg doesn't always push through

Are customers receiving duplicate, incorrect or unnecessary delivery messages?

I don't think so. Late notifications if anything

9. PAYMENTS, PROFORMAS AND FINANCIAL ADMINISTRATION

The report contains recurring checks for PayPal, credit cards and proforma payments. Some older open items suggest either a backlog or incomplete issue closure.

Are PayPal, card and proforma payments being checked often enough to release orders promptly?

card now shopify. We all get an email from shopify to let us know. Hard to miss
Paypal - email comes to main inbox, up to person on main to forward it to relev. person.
Also AM has issue. → BANK. A day behind unless Zoey is able to forward today's payments to us.

Is it clear who checks each payment route and who acts when a payment cannot be matched?

We ask Helen if we cannot work out who a payment is from ~~as~~ she can see more info than us. We also ask each other.

Are any orders waiting because payment has been received but not identified or recorded?

I don't think so

Are customers being told promptly when a payment, account or credit problem prevents progress?

10. PURCHASE ORDERS, SUPPLIERS AND OUTSTANDING ORDERS

SN

The report includes VST purchase-order logging and supplier outstanding-order reviews. These controls should ensure purchase orders, expected dates and supplier chases remain visible.

Are all purchase orders being logged and updated accurately?

?

Which supplier orders are late, unclear or require chasing now?

?

Are expected delivery dates being passed to sales and customers where needed?

Are supplier acknowledgements, price changes or quantity differences being checked and acted upon?

?

11. SYSTEMS, ACCESS AND DATA QUALITY

Many office processes depend on Intrastats, Opera, Shopify, email, telephones and internet access. The report also identifies older process descriptions that may no longer match current working methods.

Are Intrastats, ~~Opera~~, Shopify, email and telephone systems working reliably?

when an order is updated, eg edit quantity, leading to a different price, i/stats changes it initially, but it does not 'stick'

Are any pages, reports or automated tasks giving misleading or duplicated information?

Does anyone lack the access, permissions or equipment needed to complete their work?

NO

Which old process descriptions or unused routes should be removed or updated because the work has changed?

12. COVER, TRAINING AND DEPENDENCIES

The report flags heavy historical dependency on former or key users and identifies one process with only one trained person. This meeting should establish the real current position and whether daily work can continue during absence.

Which office jobs currently depend on one person knowing how to do them?

Can routine office work continue during holidays, sickness or unexpected absence?

[ ] Yes [ ] Partly [ ] No

Does anyone need refresher training, written guidance or supervised practice?

Are training records showing former staff or people who no longer carry out the work?

What should be cross-trained or documented first?

13. OFFICE ENVIRONMENT, HOUSEKEEPING AND PRACTICAL SUPPORT

The report includes routine office housekeeping such as dishwashing, vacuuming, kitchen checks, shredding sensitive paperwork and virus scanning. These are minor tasks, but open items can indicate unclear ownership.

Are shared housekeeping jobs allocated fairly and actually being completed?

bathroom unassigned

Is sensitive paperwork being shredded promptly and stored securely while waiting?

given to CG

Are kitchen, meeting-room and shared office areas in a suitable condition? ✓

Are virus updates, scans, printers, stationery and other office support items under control?

14. IMPROVEMENTS AND OPEN DISCUSSION

Use this section to record improvements that would make the office easier to run, reduce duplicated effort or improve communication with the warehouse, accounts, sales and management.

What is the one change that would make the office work more smoothly?

Bank processed for the day you are on - not the day after. Full bank access??

Is there anything the team repeatedly works around instead of the system working properly?

Delivery notification emails

discussed
I need to u/date chrome

Is there anything previously raised that is still unresolved?

Delivery notification emails

Is there anything else we need to discuss today?

ACTIONS AGREED

Action	Owner	Target date	Completed

OVERALL POSITION AT END OF MEETING

[ ] Everything working satisfactorily [ ] Minor actions agreed [ ] Significant follow-up needed

Meeting lead: ____________________ **Office representative:** ____________________

Date: ____________________ **Date:** ____________________