

# Effective Record & Filing Management

“Learn the best practices in managing your record and filing management system that will increase your performance efficiency”

## Objectives

Upon completing the course, participant will be able to

- Understand the role and importance of data control
- Understand the importance of effective document control function for the success of an organization.
- Grade records and data in terms of importance (high, medium and low importance)
- Know which record to maintain and what can be skipped
- Classify the degree of confidentiality of record
- Design a record management system based on exclusivity depending on degree of confidentiality
- Find solution to the common data maintenance problem
- Store data with various highly efficient types of methods
- Create a filing system that is robust in terms of ease of filing and maintenance and also can be retrieved with high speed and accuracy.
- Discover alternative options to data management approach.
- Learn to be pro-active in your daily working function
- Develop good communication skills to ensure success in carrying out your duties with high professionalism
- Learn good 5S Practice towards effective record management (based on the 5S model)
- Discover factors to be considered prior to choosing effective and appropriate data storage system

## Learning Process

This training will be conducted using a mixture of various approaches to accelerate and enhance the learning process. Trainer will conduct individual and group workshops on relevant topics to encourage hands-on approach to records maintenance and management. Participants will also review the current practice at workplace to identify room for improvement under the guidance of the trainer. Trainer will also create opportunity for knowledge sharing among the participants and also with the trainer to further improve and optimize the records management and filing system in the participant's respective organization.

Active learning activities are included to allow participants to engage actively in the learning process. The active learning activities are such as:

- Interactive group discussions
- Group & Individual work
- Case exercise
- Educational games
- Brainstorming

## Who Should Attend

Managers, executives, officers and supervisors involved in data recording and maintenance, document control centre, and data storage & maintenance systems.

## Program Outline

Module 1 The importance of effective records maintenance and filing mechanism for the success of the organization
Module 2 Understand the types of filing system - Centralized, Semi-Centralized and Un-Centralized Filing System <i>* Individual activity - Analyze your current filing system and records</i>
Module 3 Effective methods to differentiate vital and non-vital records <i>* Individual activity - Differentiating types of records</i>
Module 4 Introduce types of filing methods <i>* Group work - Case exercise on filing mechanism</i>
Module 5 The importance of the document control function to the organization
Module 6 Identify the degree of confidentiality of records and methods to manage these classified records
Module 7 The difference between follow-up and follow-thru in record filing and management system <i>* Group discussion – Data recording and management protocol</i>
Module 8 Handling customer's information <i>* Individual activity – Reviewing your current practices</i>
Module 9 Tactful communication for effective data management <i>* Game - Communication Skills</i>
Module 11 Choosing the records storage system for your organization
Module 12 Overcoming common problems faced in records maintenance and filing system

## The Expert Profile

Kalpana Devi Pathmanathan

**Ms. Kalpana**, a BSc Chemistry (Hons) Graduate from University of Malaya and a Certified Quality Engineer from American Society for Quality, Ms. Kalpana is a vibrant individual with deep passion for educating and enlightening individuals with sound knowledge which will transform their careers in specific and life in general.

A strong believer in the power and wealth of knowledge, Ms Kalpana has extensive experience in both the manufacturing and service industry. Her appointment to lead various engineering departments in multinational companies at a young age is evidence to her outstanding work performance and leadership skills. Her experience as a Quality Assurance Manager in her previous organization provides her the advantage to understand the importance of continuous education and human resource empowerment for the growth of an organization.

Due to her deep passion to spread her wings to the service industry, Ms. Kalpana took up the challenge to redesign and re-launch an ailing insurance scheme with policyholders of over 100,000 which was in red for many years and was at the verge of being discontinued. Ms. Kalpana successfully re-engineered the ailing scheme within a short period of time. She re-launched the scheme and there has been no turning back for the scheme since. He re-engineered scheme has operated successfully to date bringing in a lucrative profit margin for both the insurer and marketing agency and provides excellent service for the insured.

Due to her deep passion for educating others, Ms. Kalpana tutors undergraduate and post graduates on engineering subjects, statistical knowledge and also accounting for decision making in her free time. Due to her extensive experience in various industries, Ms. Kalpana is able to adapt versatility in her training material and approach. Ms. Kalpana's training sessions are delivered in a highly communicative, high spirited environment which keeps the participant's energized and open to learning.

Her ability to deliver the essence of the training in a fun relaxed way creates a comfortable environment for the participants to learn and absorb the fundamentals of the program. Her vibrant and dynamic approach keeps her participants alert and inspired throughout the training sessions. Ms. Kalpana was recently invited by The American Society for Quality to Philadelphia, Pennsylvania to serve as a judge in the International Team Excellence Award.



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## Workshop

\* Fees includes workshop materials, refreshment, lunch and certificate of attendance but excludes Bank charges & VAT per payment

Session	Date	Venue	Normal Fees	Early Bird Deadline
	<input type="checkbox"/> 4th-5th August 2010	The Legend Hotel, Kuala Lumpur, Malaysia	RM 1290	9th July 2010
Discount	Early Bird Registration <input type="checkbox"/> 5%			
	Group Registration <input type="checkbox"/> 3 or more at 5% off <input type="checkbox"/> 5 or more at 7% off <input type="checkbox"/> 8 or more at 7% off			

## Schedule

08:30 Registration  
09:00 Workshop Begins  
10:30 Coffee & Networking  
10:45 Workshop Resumes  
13:00 Networking Luncheon  
14:00 Workshop Resumes  
15:30 Coffee & Networking  
15:45 Workshop Resumes  
17:00 Workshop Ends

## Organization Details

Organization Name \_\_\_\_\_

Address \_\_\_\_\_

Tel \_\_\_\_\_ Fax \_\_\_\_\_

## Participant Details

Name	Job Title	Email	Direct Line
1.			
2.			
3.			

## The invoice should be directed to

Name \_\_\_\_\_ Job Title \_\_\_\_\_

Email \_\_\_\_\_ Direct Line \_\_\_\_\_

## Authorising Manager's Details

Name \_\_\_\_\_ Job Title \_\_\_\_\_

Email \_\_\_\_\_ Direct Line \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

\*The booking is invalid without a signature.

After complete this form,  
please fax it to (603) 40235716

**CANCELLATION & SUBSTITUTIONS:** This registration may only be cancelled in writing not later than two weeks before the workshop begins. The booking may not be cancelled nor any fees refunded thereafter. A substitute may be named at any time before the workshop begins.

**HOTEL ACCOMMODATION:** Accommodation is not included in the workshop fees. Room Reservation can be made by delegates directly with the hotel. To enjoy privileged room rates, please contact the Hotel directly and state that you're attending an event organised by GIN (Global Intelligence Network).

The Legend Hotel, Kuala Lumpur  
Tel: (603) 4042 9888  
The Summit Hotel, Subang Jaya  
Tel: (603) 8023 3000

**NOTE:** It may be necessary for reasons beyond control, to change the content and timing of the event, speaker(s) or venue. Every effort will be made to inform the participant of the change. Global Intelligence Network should not hold liable for any cost arising from this change.

**PAYMENTS:** An invoice will be sent upon receipt of your registration. Please note that full payment must be received prior to the event in order to be eligible for attending. Walk-in delegates with payment will be admitted on a space available basis. Payment may be made via cross cheque / bank draft / electronic transfer, made in favour of:

Global Intelligence Network (M) Sdn Bhd  
268-2-1, Wisma Mutiara Genting,  
Jalan Ayer Jerneh Off Jalan Genting Kelang,  
53300 Setapak, Kuala Lumpur,  
Malaysia.

Details for Telegraphic Transfer:  
Bank: RHB Bank  
Branch: Setapak, Kuala Lumpur  
A/C No: 26405800003737  
Swift Code: RHBBMYKL

For electronic transfer, Please email / fax your transaction slip to us as proof of payment.

