

TOOL 06

My Desk Manual

Your own manual for your job. It becomes your memory, your proof, and your handover file.

Inside

Systems and access · Recurring tasks · Recurring meetings
File map · Procedure templates · Key dates
Office basics · The "If I'm out" page

Build it a little every Friday

Nobody gave you a manual. So you will write one, fifteen minutes at a time, and by Day 30 you will have the guide you wish you had on Day 1.

- ☐ **Days 2 to 5:** Systems and access, office basics.
- ☐ **Week 2:** recurring tasks, key dates.
- ☐ **Week 3:** recurring meetings.
- ☐ **Week 4:** procedures, file map, the "If I'm out" page.
- ☐ **Every Friday after that:** 15 minutes to update anything that changed.

WHY IT WORKS

A desk manual protects you three ways: it is your memory on busy days, written proof of everything you handle, and a ready handover file when you take leave or move to a new role. Many experienced assistants even write one for their own future replacement.

IMPORTANT

Never write passwords in your Desk Manual, or anywhere else. Record where a system is and who gives access. That is all.

FROM 26 YEARS AT THE DESK

In every job, my manual was the first thing I opened on a busy morning. It was also the reason my bosses could go on leave without worrying, because they knew everything was written down.

Systems and access

[illegible]

Recurring tasks

[illegible]

Recurring meetings

Every regular meeting you support, and what you do for it.

MEETING	HOW OFTEN	CHAIR	MY ROLE	WHERE AGENDAS AND MINUTES ARE SAVED

File map

Procedure template

One procedure per page. Write it the way you would explain it to someone covering for you.

Procedure _____

When it is needed _____

Who asks for it _____

STEPS

#	WHAT TO DO
1	
2	
3	
4	
5	
6	
7	
8	

People involved _____

WATCH OUT FOR

Procedure template

Procedure _____

When it is needed _____

Who asks for it _____

STEPS

#	WHAT TO DO
1	
2	
3	
4	
5	
6	
7	
8	

People involved _____

WATCH OUT FOR

Key dates and office basics

KEY DATE OR DEADLINE	WHAT HAPPENS	REMIND ME ON

OFFICE BASICS

Emergency exits	Supplies: how to order
First aider	Post and couriers
Fire warden	Meeting room booking
Guest Wi-Fi instructions	Building opening hours

The "If I'm out" page

Keep this page current. If you are ill or on leave, this is what your cover needs first.

Who covers for me _____

Where my Desk Manual is saved _____

Where today's priorities are written _____

IN PROGRESS RIGHT NOW

ITEM	STATUS	NEXT STEP	DEADLINE

URGENT CONTACTS

NAME	WHY	PHONE OR EMAIL

CALM MOMENT

A complete "If I'm out" page means you can rest properly when you are away. That is a gift to your future self.