

Word Alchemy

the transformation of documentation

Processing The Process

tips for writing
clear and concise
Procedures

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You have just been given the daunting task of writing your organization's procedures. I feel for you, I do. There's possibly no worse job than having to put to paper the rules in such a way that they're not ambiguous and muddled and don't cause more problems than they solve.

However, there are some tricks to writing policies and procedures that I've learned over the years – things that will make the job easier and leave you with your sanity in tact.

Getting Ready

1. From the start, be clear about your purpose. Are you trying to set down the policies that govern your organization, or describe the steps needed to do the work? Policies and procedures are different; according to bizmanual.com, "A policy is a guiding principle used to set direction in an organization. A procedure is a series of steps to be followed as a consistent and repetitive approach to accomplish an end result." Hence, if you are directed to write a procedure, ensure you are not setting policy but simply describing how to do something.
2. Make sure you understand the guidelines your organization uses for procedures. In the US, Sarbane-Oxley legislation has specific requirements for accounting procedures. In manufacturing, procedures are needed for ISO 9000 Quality conformance. The FDA requires Good Manufacturing Practices (GMP) or Good Laboratory Practices (GLP). In some cases, the organization simply wishes to employ 5S or Six Sigma practices. Knowing what forms your procedures must comply with will help you organize all of the 'extra' stuff that may be required, such as overview statements, definitions, references to policy, etc.
3. Narrow your focus. Your written processes should describe ONE process, be it submitting travel expenses, submitting office supply orders, registering conference attendees, booking orders, or scheduling activities. You might use some of the same tools in each process, but each result is different, and at some point the paths diverge. However, don't make the mistake of saying you'll write a procedure on all the things you must do with a particular program. You might do event planning, activity scheduling, and conference registrations all from Microsoft Outlook, but each of those are different processes.

Defining the Process

1. Enter the process with a beginner's mind. You may have done a procedure a thousand times, but approach it as if it were your first time. If possible, get the assistance of someone who has never done the process before to be your test subject. They will be able to spot tasks that you do subconsciously.
2. Interview several people. If five people do a particular process, ask each of them how they do it. You will learn not only several ways to do something, but also how much tribal knowledge there is. Your job then is to take all five processes, find the best version, and perhaps even get a bit of agreement among the five to say 'yes, this is the best way for us to do this'. If they can see how their own tips and tricks make the work better, then they will be more likely to follow the new procedure and abandon bad habits.

Example: Rob and Mike are both buyers for a clothing store, and part of their job is issuing purchase orders. Rob knows the budgeting system inside and out and knows just where to

go to see his budgets. Mike is a purchasing whiz and figured out the shortcuts to filling purchase orders without extensive typing and backtracking. By following both employees, you could glean the best of both, so that there is neither arduous budget checking nor time-consuming purchase order writing. The result? Happier Robs and Mikes, and a procedure that's written down, not in someone's head.

3. During the interviews, ask a ton of questions. Why do you do that? How did you get there? What's it for? Where does it go? The interviewee may look at you as if you have grown three heads – surely you must know, you work here too. However, by getting the answers, you will hear the tribal knowledge and be able to write a more complete process.

As a side benefit, you may also discover that some processes just need to be stopped. Consider the case of Rosemary, whose job it is to print engineering drawings. Every time she prints one, there is a form she fills out by hand with data from the printed drawing – part number, project identification, engineers' and checkers' names, dates, and so forth. She then types all of this information into a database, which prints a piece of paper with the information on it. When other people look up drawings, however, they do not look at the forms or the database, just at the drawings. Why does she do triple work? Because no one told Rosemary to stop doing the old process when the new ones came online. By spending the time asking the why's and wherefore's, the process writer was able to eliminate two cumbersome steps and a load of wasted paper.

4. If something is produced that is not used in this procedure, ignore it. At best, make a reference to its being needed elsewhere (say, another procedure), but for the most part, don't address it further. If it's not used anywhere else, of course, consider eliminating its output.

Writing It Down

1. Remember the cardinal rule of Procedures: one action per step. If you say "In the logbook, enter the part number in the index and the designer in the personnel section," you have put two steps into one. It's much better to outline each step separately. However, this goes get tricky with computer processes – you don't want to list four steps to get to a menu option, for example. Instead, consider steps written like this: "To change printer options, on the Menu bar select File>Print...>Options." This way, they can see the path you're taking them on to do the one task.
2. Use simple, direct language. Consider these two examples:
 - *"It may be noted that under certain conditions alternative names may be added."*
 - *"Use alternative names when necessary."*Which is stronger? More understandable? The second, of course. Procedures are directives. Do this. Do that. Do the other thing. While holding your left foot up, do the fourth thing. The instructions are easy to follow. Use active commands. If your procedures are littered with 'should's, it's time to edit.
3. Be as detailed as possible. Don't just say hold your left foot up, tell them how high (3 inches, 1 foot, as high as it will go).
4. Test the process. Once you have it all written out, find your test subject and ask them to follow the procedure step by step as you watch. Your tester will find the stumbling blocks – the missed steps, the awkward wording – and help you refine the procedure.
5. Test the process again. This time, take it to the people who will be doing the process and ask them to follow the procedure step by step as you watch. They will often discover the one thing they forgot to mention, or the pitfalls of certain actions. Again, use their experience to refine the procedure.

6. Flesh out the rest of your procedures document. Whether or not you are making your procedures ISO 9000 compliant, you will want the following additional information on your procedure:
 - simple, descriptive title (“Preparing Work Orders”, “Issuing Invoices”)
 - simple, descriptive statement of purpose (“This procedure describes how to prepare drawings for print.”)
 - definitions list; define any task- or industry- specific words and acronyms
 - tools needed list; this should include the computer programs, specific books or logs
7. Get someone to proofread your procedure, and make sure any computer commands and url references are correct.

Finishing Up

Writing the procedures is only part of your process. Once the procedure is complete, it must be implemented; sometimes training may be required. This is not meant to discourage you but rather understand that a process piece is only useful when it is used.

Procedure writing is time-consuming. Procedures can’t be written in a day. They require some testing, some conversations, and attention to detail. As always, when planning writing projects that are out of the scope of your employees’ work statements, consider hiring a freelance writer who specializes in processes and procedures.

No matter how you plan to process your processes, whether in-house or with the help of an outside professional, your organization will run more smoothly and efficiently with written procedures in place.