

## **Writing a Procedure**

### **Making Sure Things are Done Without Mistakes and Omissions**

Procedures – and their close cousins, policies – can be a real pain in the proverbial. Sometimes, they're too tight and restrictive, and at other times, they're vague and lacking in detail. But, if your colleague calls in sick, and you're suddenly responsible for getting the payroll out on time, it's good to have a well-written, detailed procedure to help guide you through.

If done right, procedures can have an important effect on an organization. When written clearly and properly, they can help systems and people function better. If your people know what to do, when to do it, how to do it, and how not to get it wrong, you can reduce frustration and save a tremendous amount of time and effort.

Writing a procedure that is accurate, brief, and readable isn't always easy. But, with a bit of knowledge and practice, you can learn effective procedure-writing skills, and identify great opportunities to improve the quality of the things you do.

### **What is a Procedure?**

Procedures are the workhorses of a company. While policies guide the way people make decisions, procedures show the "how to's" for completing a task or process.

Procedures are action oriented. They outline steps to take, and the order in which they need to be taken. They're often instructional, and they may be used in training and orientation. Well-written procedures are typically solid, precise, factual, short, and to the point.

Many procedures seem "black and white," with clear steps and only one way of doing things: "Complete A, then B, then C." But sometimes you need to be less exact and allow room for personal judgment. When a procedure is too tight, it can cause confusion. Since life isn't always simple and clear-cut, some procedures need to allow subjectivity and individual choices.

### **When Do You Need a Procedure?**

Not everything needs a procedure, so don't create procedures for basic tasks – otherwise they'll be ignored. The number-one rule of procedure writing is to make sure there's a reason to create them: Perhaps people forget to take certain

**actions, perhaps they keep on getting things wrong, or perhaps tasks are so long and complex that people need a checklist if they're going to get things right.**

**A written procedure is necessary only if the issue is important or if there will be a significant benefit from clarifying a process. Before you begin, ask yourself if people really need or want to know about something.**

**You need a procedure when a process.**

- **Is lengthy (example: year-end inventory).**
- **Is complex (example: benefits administration).**
- **Is routine, but it's essential that everyone strictly follows rules (example: payroll).**
- **Demands consistency (example: handling a refund request).**
- **Involves documentation (example: disciplining a staff member).**
- **Involves significant change (example: installing a new computer system).**
- **Has serious consequences if done wrong (example: safety guidelines).**

**In a company, it's typical for many things to get done without written procedures. There are "unwritten rules" and informal procedures. But sometimes these unwritten rules need to be set in procedure. This may need to happen when.**

- **Similar questions are asked repeatedly.**
- **People seem confused.**
- **There are too many ways that people interpret the procedure.**

### **How Do You Write a Procedure?**

**Procedures should communicate what readers NEED to know, not just what they WANT to know. They might need to know how to do the process correctly, faster, or with less waste.**

**They also might like to know why they have to do something a certain way, where they can go for help, and what happens if something goes wrong. Where necessary, make sure your procedures deal with technical issues as well as subjective elements.**

**It's also important that your procedures have the right level of detail. Here are some questions to consider:**

- **Do users have enough information to complete the action?**

- Is there enough information to guide users in using good professional judgment?
- Is the level of detail appropriate for the subject?
- Is the level of detail appropriate for readers?
- How comfortable are readers with the subject?

### **Step One: Gather Information**

**Before you start writing, gather detailed information on the process you're making into a procedure.**

**Talk with content experts as well as others who hold key information – long-time staff members, stakeholders, technical staff, and people who will use the procedure.**

**Take lots of notes, and then sit down with the information and sort it out. As the procedure writer, you want a clear understanding of what's going on in as much detail as possible. From there, cut down the information to what the end-user really needs to best understand the process. (A great tool for organizing details is a mind map ☺. This can help you make sure you've included and connected all the right pieces.)**

### **Step Two: Start Writing**

**When you write the first draft of your procedure, don't worry about exact words and format. The main purpose is to include the information you need. Once you've done that, you can work on the words and organization.**

**Here are some good rules to follow:**

- **Write actions out in the order in which they happen. Start with the first action, and end with the last action.**
- **Avoid too many words. Just be specific enough to communicate clearly.**
- **Use lists and bullets.**
- **Don't be too brief, or you may give up clarity.**
- **Explain your assumptions, and make sure your assumptions are valid.**
- **Use jargon and slang carefully.**
- **Write at an appropriate reading level.**

### **Step Three: Edit**

- **Read your procedure out loud while you try it.**
- **Have someone else read your procedure out loud while you listen and**

### **Key Points**

**Well-written procedures help you improve the quality of work within your organization, help you reduce the number of errors and omissions, and help new people perform complex tasks quickly and effectively.**

**To get the most out of your procedures, follow some simple rules when developing them: Make sure the procedure is necessary. Then write it in a way that's easily understood – using simple, clear words to communicate as briefly as possible.**

**When it comes to how many procedures you need, sometimes the fewer the better. So make sure each procedure is absolutely necessary before you spend time creating it.**