

Writing a Procedure - Making Sure Things are Done Without Mistakes and Omissions (Article adapted from -"Mind Tools Club")

Procedures – and their close cousins, policies – can be a real pain in the neck. 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? Policies guide the way people make decisions and 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 (ie. 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).

How Do I write A Procedure?

Step One: Gather Information

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

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.
Example: "Add to the Cancellations tab on the spreadsheet" rather than "Supplement the existing records on the spreadsheet with these new ones."
- Use the active voice.
Example: "Place the file in the administrator's inbox" rather than "The file should then be placed in the administrator's inbox."
- Use lists and bullets.
- Don't be too brief, or you may give up clarity.
- Include pictures and diagrams to give the reader a visual reference.
- Write at an appropriate reading level.

Step three: Proofread and edit. Try the procedure out and have others test it too.