



May 2008 Documenting Procedures

Whether you've been asked to document a particular aspect of your job, write up a technical process, or draft a procedure for training, thinking through the process before writing can be helpful. Here are some general tips to help you the next time you're asked to draft a procedure.

First, think about the specific procedure you'll be writing and the audience who will be reading your work. Will customer service representatives, mid-level managers or executives be following the procedure? Don't assume too much about your audience by using acronyms or abbreviations.

Next, think through the procedure in broad terms. How does the procedure relate to other processes? What skills or knowledge are necessary for an employee to follow the procedure? Are there any safety or privacy issues to address? Will a regulatory agency be reading your procedure? What equipment or supplies are needed for the procedure?

Break the procedure down into a series of steps. The steps shouldn't be so broad that the reader gets lost or so small that the reader is eager to skip some steps. Be sure to use clear, direct writing. This isn't the time to practice your literary skills or show off your vocabulary. The writing should be at the level of the reader or even below.

Think about how you can complement the writing with illustrations, photos, charts, or other visual elements. Bullet points and numbers can help organize the steps. Use a readable font and plenty of white space.

Find out if one person in your company is responsible for maintaining all procedures. Is there an electronic file that organizes all procedures? If not, where do you want to store it and how do you want to distribute it to the people who need to have it?

Consider adding examples at the end of the procedure. For example, if you're documenting how to respond to a customer's complaint, include copies of letters or scripts for a customer service representative to review.

Finally, don't forget to include the date the procedure was written and who wrote it. If it's an updated procedure, consider including the date of the original and the date you revised it. And, mark your calendar to review the procedure in six months or a year.

If you need help drafting procedures or updating training policies, give me a call. I'm always happy to consult on a project or complete it for you.

Karen DeYoung is principal of DeYoung Consulting Services, which provides quality learning experiences for individuals and groups. We develop training materials and activities that advance individual, team, and organizational learning. Our work is done with integrity, reliability, and accountability.

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