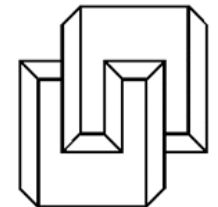


Addressing the Debate of Future Tense in Policies & Procedures Communication



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URGO

About Raymond Urgo (Mr. P&P)

- Age 7: Wrote neighborhood club rules, played telephone company
- Age 27: Methods & Procedures Analyst, New York Telephone Company
- Age 40: Founded Urgo & Associates, management consultancy in P&P
- Professional career mission: To define and promote P&P Communication as a discipline and a way to transform organizations



What You Can Expect in Today's Webinar



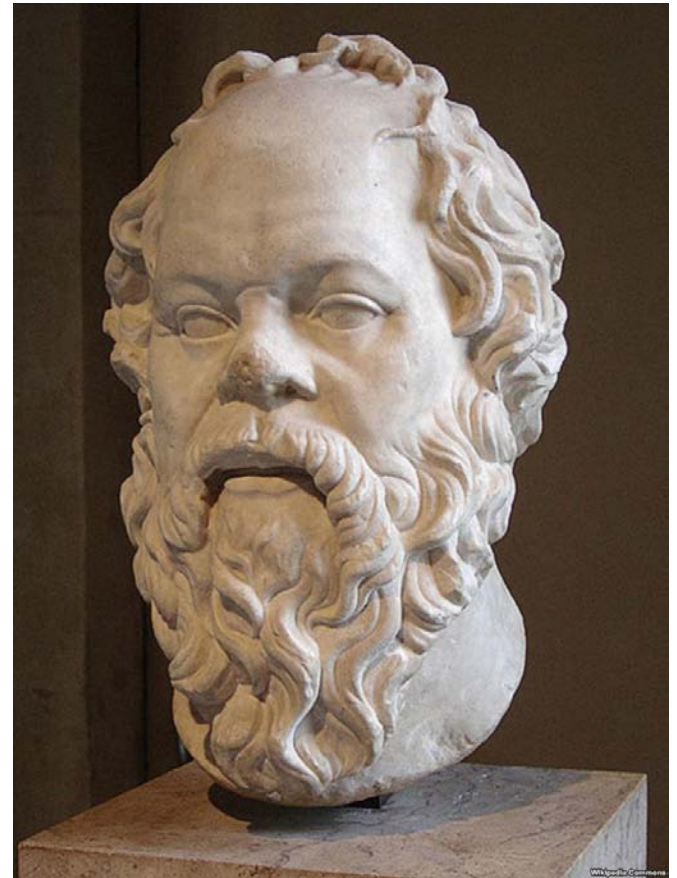
- How severe and serious is the debate
- Review of “shall” and “will”
- Recommended rules and examples for using the present and future tenses
- Four reasons or causes for using the future tense inappropriately
- Related article and reference sources for this webinar
- Your questions and comments

Free P&P resources AND a Special Offer!

Teach vs. Think

*I cannot teach anybody
anything,
I can only make them
think.*

Socrates
(469 - 399 BC)
Athenian Philosopher



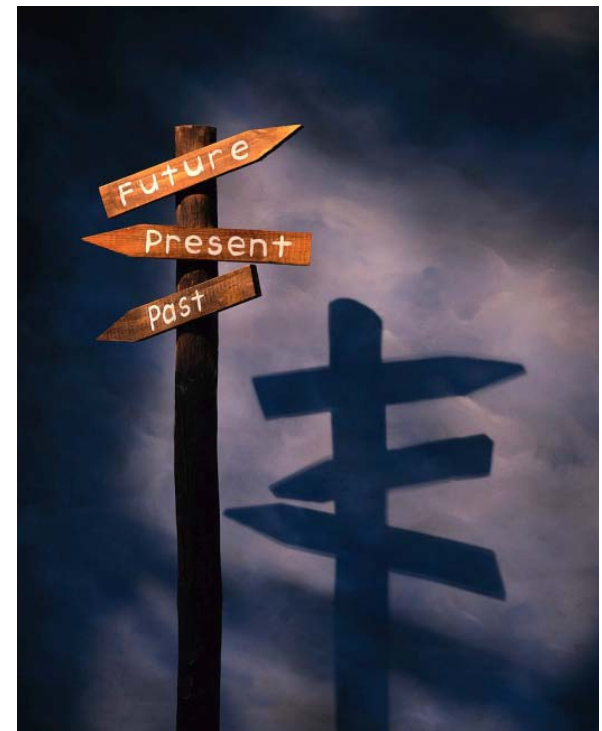
Poll of Audience

Which of the following best describes the use of future tense in your organization's P&P content?

- a) Less than 15%
- b) 16% to 50%
- c) 51% to 85%
- d) More than 85%
- e) Don't know or not applicable.

Present Tense vs. Future Tense: How Serious a Matter in P&P Communication?

- Not a serious matter.
- It's a "house rule" matter of
 - when to use future tense and
 - how to use future tense.
- The answer is in applying common sense and style.



Review: What Are “Shall” and “Will”

Shall and *will* are auxiliaries to verbs used to denote futurity. (Their cousins are *should* and *would*.)

Shall is used with 1st person:
I / We / Our *shall verb* ...

Will is used with 2nd and 3rd person:
You / He / She / It / They *will verb*...



We *shall guarantee* our products for 90 days.

Acne *will refund* your purchase within 90 days.

Advice for Recommended Rules on Use of Present vs. Future Tense in P&P

- Use present tense unless one of the following is intended:
 - futurity
 - a strong promise, or
 - a threat or warning.
- When using future tense, use *will* (not *shall*) regardless of 1st, 2nd, or 3rd person.
- Never use *should*; *would* is not applicable.

Present tense



Future tense



Present tense is more direct because it does not qualify the verb with an auxiliary verb.

Will is less formal and more common than *shall*.

Examples of Futurity, Strong Promise, and a Threat Using the Auxiliary *Will*

Use <i>shall</i> or <i>will</i> to indicate...	For example...
futurity	If you are not satisfied within 30 days, Acme Corporation <i>will</i> refund your money in full.
a strong promise	<p>If you are not satisfied within 30 days, Acme Corporation <i>will</i> refund your money in full.</p> <p>In hiring and staffing, Acme Corporation <i>will</i> not discriminate based on age, race, creed....</p>
a threat or warning	Violators <i>will</i> be prosecuted to the full extent of the law.

Reasons/Causes Why Future Tense Is Frequently Used Inappropriately

- Choosing tenses unconsciously.
- Not writing in the user's timeframe.
- Creating an imperial tone.
- Not customizing external-party content for end users.



Reason/Cause: Choosing Tenses Unconsciously

- Many writers write and edit to themselves, not their audiences (users).
- Many writers write and edit according to “HII”:
 - Habit,
 - Imitation, and
 - Ignorance.



“Most writers choose their tenses unconsciously, but several basic conventions exist for selecting tenses in technical writing .”

Quote from the
Shipley Associates Style Guide

Reason/Cause: Not Writing in User's Timeframe

When writing P&P for use by your audience in the future, think and write for their timeframe – the present tense.

Change verb from:

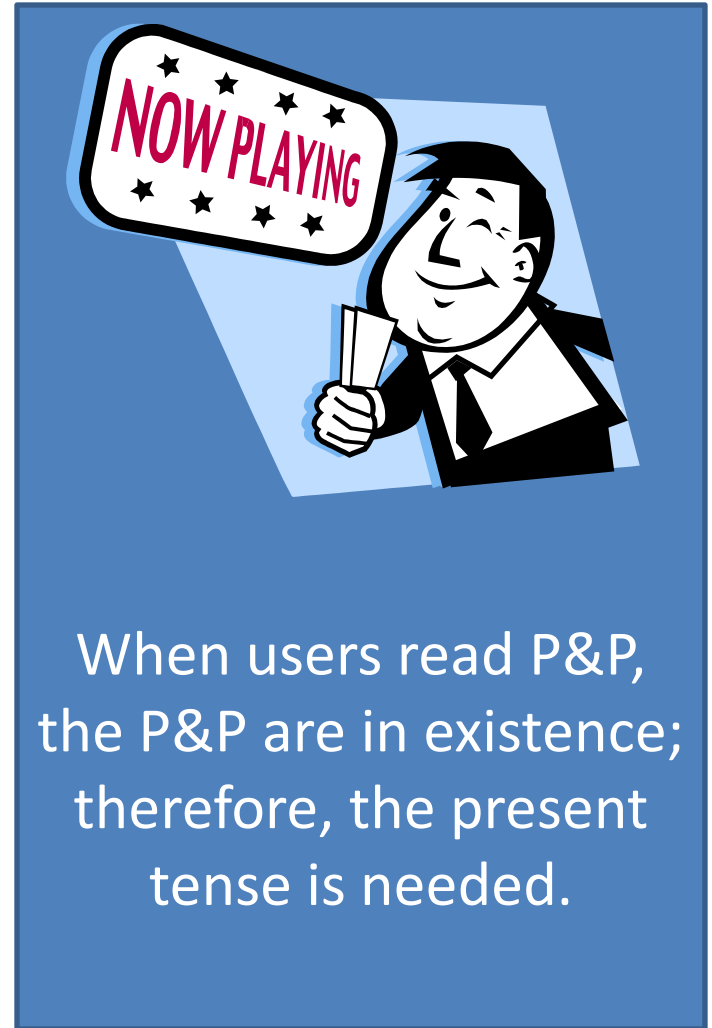
Input your password and then press **Enter**.

Result: The Welcome screen *will display*.

Change verb to:

Input your password and then press **Enter**.

Result: The Welcome screen *displays*.



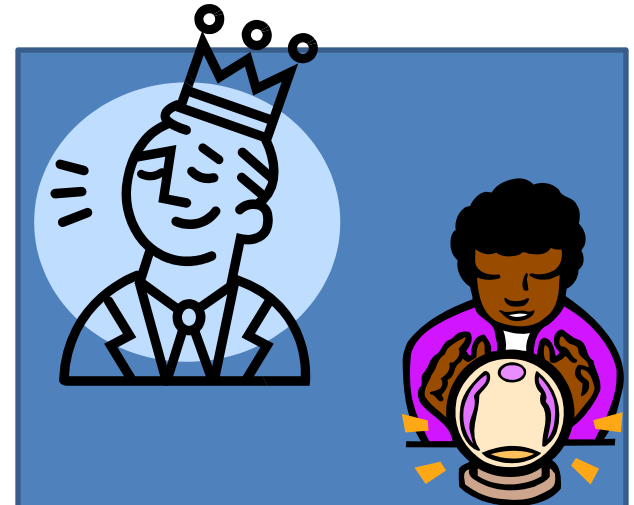
When users read P&P, the P&P are in existence; therefore, the present tense is needed.

Reason/Cause: Creating an Imperial Tone

Using future tense, especially excessively, gives information an “imperial tone” causing P&P to sound legal, bureaucratic, or even biblical.

Example of imperial tone: Thou shall not leave early from work without permission.

Consider: Today’s workplace culture is less formal than 50-60 years ago.



Speak and write *to* users, not *at* them.
Don't sound like kings or prophets writing proclamations to be issued to subjects of the kingdom.

Reason/Cause: Not Customizing External-Party Content for End Users


- External-party content defined



- Role of Intermediary P&P Analyst defined



- Implications if future tense is communicated to end-users:
 - for users
 - for audits



An intermediary P&P analyst takes externally received source content (laws, regulations, standards) frequently provided in future tense, and adapts the content for his end users' needs in the present tense.

Example: ISO's Use of *Shall* and *Should*

- ISO defined
- Use of *shall* and *should* in standards
- ISO does not require organizations to use the auxiliaries *shall*, *will*, *should*, or *would*.



In the ISO Standards, *shall* means required and *should* means recommended.

However, organizations using the ISO Standards are not required to use these or other auxiliaries in their P&P content.

Related Article and Reference Sources for this Webinar

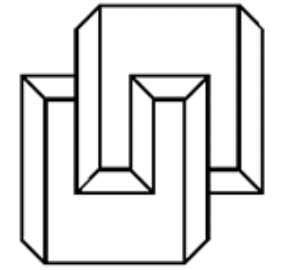
Related article: The following link is to the “Our Resources” page on the Urgo & Associates website: [**The Use of *Shall* and *Will* in Policies and Procedures Documents**](#)

Reference Sources: The following sources were quoted in this webinar:

- Shipley Associates Style Guide
- Leslie H. Matthies
- Ralph Robinson

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- Provide assessments and strategic advice on P&P programs and resources
- Lead P&P content development projects to simplify complex practices and content
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