

Investing for the Best in Procedures Documentation

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Every business, from the local delicatessen to the multi-national corporation, functions according to standard operating practices, frequently referred to as policies and procedures (P&P), processes, or standards. While not all companies choose to document their business or technical operating practices, more and more, they are investing in this arena. Why? Documented P&P are being used in response to the increasing needs for training and other performance improvement strategies in organizations. Two factors driving these needs are changes in technology, and changes in organizations, such as downsizing, re-engineering, Total Quality Management, and ISO 9000.

Unfortunately many companies investing in documented P&P are either under-, over- or mis-investing in their approaches. Many first-time efforts are so short sighted that some industry experts see a new market for P&P documentation: "The Re-dos". During 1992 for example, 47% of American companies failed ISO certification because of inadequate P&P documentation. Two key problems with procedures documentation investments are (a) top management's lack of commitment to enforcing P&P efforts appropriately, and (b) organizations continuing to communicate information for the industrial era using 17th century principles of rhetoric. The challenge then is to communicate complex business practices effectively in simplistic ways for the information era. Consider these pointers for getting the most from your procedures documentation investment.

Have a P&P development process. To successfully launch and maintain a P&P effort your organization *must* have a P&P development process in place. Too often organizations invest in initial development without concern for future maintenance. Information not maintained loses integrity and employees will avoid using it for good reason. The P&P development process should identify the roles and responsibilities for initiating,

owning, communicating, revising, and approving procedures as practices *and* as documentation.

Maximize P&P talents. Be sure your P&P talent is working with the latest methods, techniques, and tools. Their role with documentation should not be scribes passively writing what others say happens, but rather information architects developing information. Position their role to "learn the business" by being a part of work improvement efforts. A growing trend is to consolidate P&P efforts with training. Done properly, companies can save time and costs by developing and delivering *reference-based* training.

Document for online communication media. Even if your organization has no plans to communicate its procedures online, now may be the perfect time to begin. Why? First, research shows that what we have learned about communicating effectively online can be applied to paper-based documents while making the later even more useful to readers. Secondly, your organization eventually will probably want to communicate online and will need to prepare its information for transition. Many organizations simply "dump" their procedures documentation (developed exclusively for hard copy purposes) into an online system and then announce they have online communication. Sorry, they have hard copy communication only *stored* and *accessible* online. Their information is not designed for using the new media or such technological features as hypertext which allows for interactive reading.

Use structured and analytical writing approaches. A *structured* writing approach develops information into modular units. The approach allows more than one person to simultaneously develop a document thereby

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speeding up the development process. And for users, they can access information faster. With an *analytical* writing approach, writers replace prose-based information with lists, tables, scripts, and flow diagrams to *pre-interpret* information for the user. Pre-interpreted information reduces the amount of reading, increases comprehension, and reduces the chance of errors in performance by the user.

Document for the user's job. Document information to be *task* oriented according to business *processes*. By comparison, traditional

approaches usually are *subject* oriented according to business *functions* leaving users to assemble information as to how to perform their job.

Focus on the purpose of P&P. The *primary* purpose of *documented* P&P is to provide the curriculum for organizational *training*, and to provide future *consistent reference* for the trained user. By focusing effectively, procedures communication will have significant performance improvement for the individual and organization.

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