

## Procedure Writing: Principles and Practices

Douglas Wieringa, Christopher Moore, and Valerie Barnes. 1998. 2<sup>nd</sup> ed. Columbus, Ohio: Battelle Press. [ISBN 1-57477-052-7. 243 pages, including index. \$34.95 (soft cover).]

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*Procedure writing: principles and practices* should prove to be a classic reference source for procedure writers and the discipline of procedure writing. The book is not a how to guide on the process of writing procedures; but rather, a melding of theory and practice on communicating written procedures as a product.

This book is for any serious procedure writer, including the novice, seeking principles, ideas, and rationale on procedure writing style. It is especially useful for procedure writers using the more traditional approach to communicating a procedure as a stand-alone document and with a hierarchical outline format of steps. The book is a must for any procedures group to have available as a reference source when making judgments about communication style or even to use as a basis for developing a procedures group style guide.

Originally written for procedure writers of the United States Department of Energy, *Procedure writing* has applicability to procedure writers in other situations. Writers of business policies and procedures will find the book useful, even though the book does not address the distinction of “policy” and “process” both of which are often linked to business procedures (or instructions). Also, the book does not address communicating the interrelationship of action among work roles (or departments) such as the commonly used *playscript* procedure.

The book has 22 chapters organized into five parts. Each chapter begins with an illustration of a procedure identifying the application of key points of the chapter. The book is well written and edited; however, additional subheadings in many places would make information access easier for the reader. Throughout the chapters, the authors conveniently locate excellent examples with clear explanations of points being presented. The book has a useful glossary and index. The authors’ bibliography contains more than 125 sources that they cite in the book. These sources date from 1928 to present, most within the past 25 years. The sources represent dissertations, journal articles, conference proceedings, books, and style guides on such subjects as reading, psychology, technical communication, human factors, writing styles, and grammar.

Part One, The Basics, introduces the reading process of procedures—a subject rarely dealt with in other books on procedures communication. It also introduces the writing process of procedures by identifying seven steps: planning, investigating, organizing, writing the draft, reviewing and revising, testing, and maintaining.

Part Two, Writing Basic Steps, covers syntax (the way words are arranged), vocabulary, level of detail, and numerical information. Under syntax the authors provide a concise review of grammar applicable to procedures writing which is likely to be very helpful for the novice. The authors introduce the term “essentialize” (p. 40) to determine what information is truly necessary to support readers and include in a procedure. When addressing level of detail, the authors seem to refer more to the amount than the level of information to include.

Part Three, Format and Organization, defines step format as “the way steps should look” (p. 83). The authors emphasize mechanical features, such as ragged-right margins and considerations for font type, size, and style. When organizing the steps of a procedure, the authors advocate a hierarchical step-numbering system (similar to outlining) with a maximum of three indentations and the use of Arabic numerals only. They do not address a procedure’s length (number of steps or sub-steps), nor provide any guidelines for wording a procedure’s title. They recommend the use of a cover page for each procedure, implying a traditional approach of a stand-alone document, rather than an integrated (unified) set of chapters in a procedures manual. They address format and organization for communicating procedures only on paper.

Part Four, Writing Complex Steps, contains chapters on conditional statements; logic (including decision) tables; and warnings, cautions, and notes. Part Four includes a chapter with an excellent classification of situations for using cross-referencing, which is important to understand especially for a procedure written as a stand-alone document in a collection with other procedure documents. The authors also present an excellent classification (along with descriptions, guidelines, and examples) of the functionality for special types of procedure steps, such as verification, continuous, time-dependent, concurrent, and reminder steps. They dedicate an entire chapter to flowcharts for procedures that contain many decisions. The flowcharting chapter does not provide principles for using, wording, or selecting a font type, size, or style for all recommended symbols. It does address layout, benefits, and research on flowcharts versus text. For the benefit of a business or quality management procedure writer, the chapter does not have pointers on flowcharting procedures with multiple doers (individuals or departments).

Part Five concludes with helpful points and reminders about procedure writing as a craft, limitations of procedures, and knowledge of the writer versus user.

Through their very extensive research, application of their research, and fine attention to detail, the authors have written a book that makes a significant advancement to the discipline of procedures writing as an art. Although *Procedure writing* best addresses the needs of technical procedures writers who write a procedure as a stand-alone document with steps in an outline format, other procedures writers can certainly benefit from the many principles and practices presented.

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*Raymond E. Urgo, principal of Urgo & Associates, has 20 years’ experience specializing in the discipline of policies and procedures. His experience in this discipline includes consultant, author, speaker, and judge. Urgo teaches policies and procedures at UCLA Extension. He founded and was first manager of STC’s Policies & Procedures Special Interest Group.*