

Writing Effective Policies and Procedures: A Step-by-Step Resource for Clear Communication

Nancy J. Campbell. 1998. New York, NY: AMACOM. [ISBN 0-8144-7960-X. 400 pages, including index. \$60.00 (softcover).]

Given the dearth of books about policies and procedures (P&P) communication, Nancy J. Campbell's *Writing effective policies and procedures* is a very welcomed addition to the library bookshelf on policies and procedures communication.

This book best suits the novice to P&P writing, whether or not in a P&P career position. The mid-level P&P specialist following more traditional approaches to P&P communication may find the book a useful resource for enhancing skills and self esteem in the P&P discipline.

The book is structured according to 12 chapters. Each chapter ends with a summary followed by a Tools and Resources section that provides supplementary details to the chapter. Topics covered include defining P&P, where to start, wording, formatting, and concerns for distribution, maintenance, and online communication. The book is a self-contained resource. It provides no citations to its information sources nor offers readers avenues for additional information beyond its covers.

Nancy Campbell writes effectively in a very conversational style. She addresses her audience as though she is teaching them in a class setting—instructing and guiding them through principles, actions, and explanations. Campbell knows the common challenges, thoughts, expressions, and questions of novices to P&P assignments. She aptly responds to her readers' needs not only in what she says but also by how she entitles her chapters, such as Where do I start? Is there a certain format I should use? How do I get them to read this? We haven't used that procedure in years. We're thinking about going on-line.

The author takes us beyond the world of merely knowing about effective P&P writing. Her book is a treasure chest of P&P communication tools in the form of tip sheets, checklists, schedules, forms, guidelines, and instruction sheets. She tells her readers this book is a workhorse meant to be marked up with notes and its forms and tip sheets copied for use and modification. These items serve as a practical way for the novice to get started, perfect existing P&P, and prevent failure in the process.

The author presents an appropriate distinction between *policy* and *procedure* (p. 17-18), although some schools would probably disagree with some points. She does not distinguish between *procedure* and *process*, rather considers a process as a synonym for procedure. This distinction might be helpful for the many organizations that are process oriented in their management operations.

In Chapter 2, Where do I start?, Campbell addresses four steps of P&P development: planning, analysis, research, and prewriting. Regarding planning, she astutely states, "You must develop a

plan, however brief. P&P projects rarely turn out to be simple” (p. 27). The information and techniques for the analysis, research, and pre-writing steps are brief and traditional. The techniques do not address how to conduct a work breakdown, process, or task analysis—a growing need for designing performance-based P&P manuals. For a book that refers to itself as a step-by-step resource, it does not delineate or outline the steps beyond prewriting. Instead, readers are on their own to determine remaining steps (such as writing, reviewing, publishing, and distributing) in the P&P writing process. Fortunately, there are chapters that provide good information and resources for these non-delineated steps.

Chapter 4 addresses wording with the kinds of guidelines and examples commonly found in style guides and books on business and technical writing. The novice to P&P or technical communication may find this chapter’s information conveniently available. Campbell recommends reviewing the chapter’s Wording Tip Sheet “every time you start to write” (p.84). Most writers will probably find this tip sheet more timely to use when ready to rewrite or edit their work. Furthermore, given there are 39 uncategorized tips spanning nearly a dozen pages, writers may find reviewing this tip sheet an impractical way to learn. Most people can barely handle more than 7 items at a time. Even the author makes this point later in the book.

Chapter 5 covers at least a half dozen formats to use depending upon the nature of the material and the needs of the audience. Some formats discussed are outline, playscript, flowchart, matrix, and question and answer.

The book contains information about P&P communication practices related to but beyond the scope of its title “writing effective P&P.” Such practices include notification of new P&P, dealing with an organization’s resistance, establishing revision reviews, and addressing legal matters with P&P. Again, there are plenty of tips and sample logs for implementing these P&P communication practices in an organization.

Although the book contains few approaches that are new or leading edge for P&P communication, it makes a significant contribution to the P&P bookshelf through its collection of tools and resources. These items make this book a memorable resource for getting people started, reminding writers of the do’s and don’ts, providing supplementary information, and triggering new ideas for P&P communication.

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Raymond E. Urgo, principal of Urgo & Associates, has 20 years’ experience specializing in the discipline of policies and procedures for organizations. His experience in this discipline includes writer, analyst, supervisor, mentor, consultant, teacher, author, speaker, and judge. Urgo is the founder and first manager of STC’s Policies & Procedures Special Interest Group.