SUCCESSFUL POLICIES & PROCEDURES WRITING PROJECTS – PROVEN STRATEGIES

By **Juliet Kontaxis**

"Juliet Kontaxis and the Benchmark Technologies team have been helping clients develop procedures manuals for over 20 years. Their methodology is detailed in Rapid Documentation of Policies and Procedures: The Handbook."

Benchmark Technologies International

411 Hackensack Avenue

Suite 804

Hackensack, NJ 07601

Email: info@btiworld.com

Phone: 1 (800) 265-8254

1 (201) 996-0077

Putting together a procedures manual seems like it should be fairly straightforward, doesn't it? Frequently, however, procedures documentation projects stall or fail. In very simple situations, developing a procedures manual can be fairly straightforward, but many situations are not very simple.

Drawing upon our experiences as consultants specializing in the development of procedures manuals, this article outlines key strategies critical to the success of any procedures documentation project. How do we define success? A successful project is conducted efficiently and produces a valuable resource for the organization.

Understanding these key considerations will go a long way to ensuring that your procedures manual project is successful!

1. ENSURE YOUR PROJECT HAS AN OWNER (EXCLUDING YOURSELF!)

Projects which lack an enthusiastic management sponsor or owner will not be successful. A procedures manual project needs a champion who can ensure that the project has the resources and commitment it needs. Discovering that support is inadequate midway through the project should be avoided. The project sponsor is also involved in signing off on key aspects of the project - so there should not be any surprises at the end of the project.

2. SELECT A METHODOLOGY BEFORE PROJECT KICK-OFF

Anyone who has not developed a procedures manual previously needs a methodology. The methodology governs the approach - what needs to be done, how, and the order in which stages are completed. Most of the data for the procedures will probably be collected either via research and/or directly from subject matter experts (SMEs). Unless the manual is being written by the SME, you'll need a robust data collection process.

What are the best ways to acquire a methodology and data collection process? Depending on your capabilities and experience, developing your own methodology and process may be an option. If not:

- Check with people in your organization who have successfully developed procedures documentation previously.
- Research books and/or courses on the subject.
- Engage a consultant as a guide. Consultants with demonstrated subject matter expertise and experience can provide guidance and project management resources, or deliver the entire procedures manual project.

3. CLEARLY DEFINE THE SCOPE OF THE PROJECT

Before you start a procedures manual project, you need to define the scope of the project - that is, what will be documented. The scope includes not only the process(es) and department(s) which will be covered, but also the level of detail required and whether policies, exhibits and related references will be incorporated.

What are the best ways to ensure the scope is defined at the beginning of the project?

- Understand and document the purpose and audience for the procedures documentation, and get sign-off by the project sponsor.
- Upon sign-off, mock up what the final procedures manual will look like, including sample procedures, and decide how exhibits and related policies, processes and information will be referenced.
- Review the mock-up with the project sponsor and key impacted stakeholders, and obtain their sign-offs.

Involving the project sponsor and key stakeholders in defining the approach at the start of the project helps to avoid problems later on - ensuring your project is efficient!

4. DEVELOP AN ORGANIZER AND TEMPLATE PRIOR TO DATA COLLECTION

The organizer for the procedures manual is essentially its Table of Contents. The template for the manual determines the look and usability of the final document. While it may seem counter-intuitive, it's best to develop a good draft of the Table of Contents along with the template at the start of the procedures manual project. As you collect data, you populate the template with the data. This approach greatly speeds up the development process and the populated template becomes a tool for easily tracking missing data!

5. ENSURE CHANGE MANAGEMENT RESOURCES ARE AVAILABLE POST-PROJECT

The value of the procedures manual as a resource for the organization will be short-lived and limited if the manual is not maintained. Effective change management of the manual requires dedicated resources and should be addressed at the beginning of the project to ensure that resources will be available. Effective change management includes assigning a procedures manual "owner" and establishing a process for ensuring updates are timely and are communicated to stakeholders. Today web-based systems are available which greatly facilitate the distribution of manuals to stakeholders and the management of changes.

CONCLUSION

Now that you have read through the strategies, it's probably clear that there's a common theme - the importance of planning your procedures manual project before you start writing the manual.

If you would like further details on the strategies outlined in the article, please visit: http://www.rapiddocumentation.org.