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WRITING PROCEDURES MANUALS FOR COMPLEX ORGANIZATIONS: 5 SECRETS FOR SUCCESS

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."

As consultants specializing in the development of procedures manuals, we often hear from organizations after they have reached a roadblock in their attempts to write a procedures manual. Our experience tells us that the root cause of the roadblock is typically the complexity of the organization's processes.

Processes within organizations are becoming increasingly complex as a result of a variety of factors including automation, globalization, customized service offerings, and outsourcing. These complex processes frequently require high levels of expertise and coordination; involve numerous stakeholders and decision points; and occur over long periods of time. As a result, it can be tricky to write a procedures manual for an organization with complex processes.

Drawing upon our experiences, this article reveals 5 secrets for writing a procedures manual for a complex organization. Understanding these 5 secrets will help you avoid roadblocks in your procedures manual project.

1. FOCUS ON THE "BIG PICTURE"!

If the activities of the organization or group are complex, it's essential to have a comprehensive, high-level understanding of all the activities before designing the manual. Not understanding the "big picture" is analogous to the six blind men feeling different parts of an elephant and coming to totally different conclusions about what the elephant is. An incomplete understanding of required activities at the beginning of a procedures manual project can lead to delays, because the manual may need to be re-designed as a fuller picture develops.

2. START AT THE TOP!

What's the best way to get a comprehensive high-level understanding of all activities? Start at the top! Search existing documentation for descriptions of activities, and begin constructing a list of activities and a getting a sense of how activities are performed. Then set up a meeting with the most senior-level person in the organization or group, who should have a reasonably good understanding of the activities. Review the list of activities with this individual and fill in any blanks in the big picture.

3. STAY AT THE TOP!

Don't have one person with a good understanding of the big picture in the organization?

Identify the most senior-level people responsible for a group of activities and review the list of activities with each of them. While senior-level people can be challenging to access, they are generally the best sources for comprehensive and reliable information. Collecting high-level information from the mid or junior levels of the organization tends to provide only partial views of the big picture, which slows the data-collection process and results in less reliable information.

4. ORGANIZERS RULE!

The more complex the procedures are, the more critical it is to have a comprehensive, flexible organizer to house the procedures. Complex organizations are generally fairly dynamic, so an organizer should also facilitate updates to procedures. We have discovered that Process Maps work extremely well for organizing complex procedures. By way of a simple example, we have learned through big-picture analysis that an organization sells widgets via catalog, online and to stores. The "Order Fulfillment" process consists of several sub-processes (or activities) shown on the Process Map below:

- **1.0 Order Fulfillment**
- 1.1 Capture Order
- 1.2 Arrange Payment
- 1.3 Ship Order
- 1.4 Collect Payment

Since orders are received and captured in various ways, "1.1 Capture Order" can be organized into the following sub-processes:

- **1.0 Order Fulfillment**
- 1.1 Capture Order
 - 1.1.1 Capture Order: Catalog Order
 - 1.1.2 Capture Order: Online Order
 - 1.1.3 Capture Order: Store Order
- 1.2 Arrange Payment
- 1.3 Ship Order
- 1.4 Collect Payment

And since catalog orders may be received by mail or via phone:

- **1.0 Order Fulfillment**
- 1.1 Capture Order
 - 1.1.1 Capture Order: Catalog Order
 - 1.1.1.1 Capture Order: Catalog Order: Phone Order
 - 1.1.1.2 Capture Order: Catalog Order: Mail Order
 - 1.1.2 Capture Order: Online Order
 - 1.1.3 Capture Order: Store Order
- 1.2 Arrange Payment
- 1.3 Ship Order
- 1.4 Collect Payment

Using a Process Map as an organizer easily enables categorization of procedures. If the organization decides to sell to distributors, a new sub-process could easily be added as "1.1.4 Capture Order: Distributor Order," if necessary. Additionally, users of the manual can easily access specific procedures such as capturing a catalog order received via mail.

5. VERIFY, VERIFY, VERIFY!

Before collecting any procedural information, verify the Process Map with all stakeholders. Stakeholders include those senior managers who provided big-picture information, as well as individuals directly or indirectly involved in the processes. Verification provides a completeness check and ensures all stakeholders are on board with the organizer. This should simplify and streamline procedural data collection and procedures writing!

CONCLUSION

As organizations become more complex, writing procedures manuals can be tricky. Developing an effective organizer for procedures ensures completeness, accessibility and maintainability of complex procedures.

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