Direction

The Newsletter of the STC Policies & Procedures Special Interest Group 1st Quarter 2010

Manager's Report—by Dawnell Claessen

It must be springtime!

I am excited and optimistic about the future. I am especially upbeat and optimistic about the future of STC and of our SIG.

After several months of waiting and wondering what our membership counts would be after membership renewals, we now know that we lost members, but not nearly so many as were once feared. As of March 30, 2010, our membership count is 566, down at least 200 members from 2009.

However, as the SIG's leader, I am comforted by the fact that every single one of those 566 members made the conscious choice to pay the extra money and join our group. I am also aware that this puts a responsibility on STC and on SIG leaders to maximize the value returned to our members through SIG activities. I pledge to do everything I can to make that happen. I hope all SIG members (yes, all 566 members) will drop me an email or make a list serve post to tell me what you want from the SIG. Let's work at managing expectations!

Volunteer Recruiting News

Speaking of membership, I am thrilled to announce and welcome our new Membership Manager, Emily Kowal. You will find an introductory post from her on our ListServ, as well as reports and other information from her in this issue of Direction. Emily, thank you for volunteering and welcome!

Other Opportunities to Volunteer

P&P SIG is STILL actively recruiting volunteers! I want to make this very easy for you. If you don't feel you want to take on a position, volunteer to take on a task just to see how it goes. For example, we are looking for a SIG Co-Manager, but if you don't want to take that on, maybe you volunteer to research new resources for our resources web page. Email me if you're interested in helping out.

Conference Update

The Tech Comm Summit is coming up fast! I hope to see you in Dallas May 2-5, 2010. P&P SIG will hold our annual business meeting at lunch on Monday. We will also have a table at the Welcome Reception on Monday. The SIG networking even offers a breakfast this year – be sure to buy your ticket in advance. The SIG will be putting on a Progression Session of Topics in Policies and Procedures on Wednesday.

Watch the list serve for news and announcements about the conference and SIG activities.

Volunteers Needed for the Conference

Do you plan to attend the conference in Dallas in May 2010? Volunteers are needed for one or two conference activities. Your SIG needs your help and there are various ways you can help while networking and enjoying all the conference has to offer.

In This Issue:

I am offering tickets to the Wednesday morning SIG network breakfast as volunteer recognition. If you are interested, please email me and we'll discuss the details and responsibilities.

Don't Forget the P&P SIG Discussion List

Need the ListServURL? http://www.stcsig.org/pp/resources/listserv.php.

Breaking the Hard Copy Habit

By Suzanne Quigley

As policy and procedure writers, we know the documents we're creating are needed and meaningful in the day-to-day operations of the company and so they'll be read. Or will they? I recently experienced the challenge of getting staff to read and use our new online P&P.

I work at a company that oversees the daily operation of a state funded insurance program. Between complying with the Health Insurance Portability and Accountability Act (HIPAA), other regulations and the internal processes involved with membership enrollment, eligibility, and appeals, there is more than enough documentation to go around. Staff need to be kept current in all of these areas.

In the past, our organization achieved this via "the binder," a book containing hard copies of all relevant documentation. But this method was cumbersome, especially when it came to updating and distributing revised documents. And sometimes, necessary documents never even made it into "the binder." They'd get passed out and pinned up on cubicle walls. In an attempt to get everyone on the same page, we purchased a document library system.

We thought we'd covered all the bases…

Prior to rollout, we made sure that we had management's buy-in for the document library. We felt it was important that everyone use the new system from the top down. Simple and easy to use, this web-based application would give everyone access to the most current policies and procedures. I daydreamed about how staff would be in and out of the library all day, every day, and efficiency would soar.

We implemented the online system in phases: the first group was Customer Service . Prior to the rollout, we determined which documents were crucial to them on a regular basis, loaded these into the library and stored them under the 'document type' "Customer Service Material". During training, the customer service representatives were told about this library, and that other documents could be found listed under very specific document type search fields such as policy, procedure, letter, and call guide.

Then reality hit…

Making documents readily available doesn't automatically mean people will use them. Even though staff was receptive to the concept of the online document library, old habits die hard.

And since they already had a method for accessing documentation, they weren't about to change overnight. Besides ensuring that we had categorized the documents for easy retrieval, we implemented the steps below to encourage staff to break out of the old "hard copy" habit:

- **Disable the print option.** Allowing users to print documents defeated the goal of encouraging onscreen use. Removing this ability nudged users to become comfortable with accessing the electronic version only.
- **Streamline the document search process.** Make sure the categorization and labeling of documents is organized in a way the audience is likely to relate to.
- **Provide an easy-to-use, customized user manual.** Although the document library system we're using is a simple one and came equipped with Help, we created our own reference guide which focused on specific steps staff needed to take to perform certain tasks. We believed the best way to move through the learning curve was to provide the clearest instructions possible, ones that spoke specifically to our business.
- **Keep staff abreast of new or revised documents.** Whenever I created a new policy and procedure or updated an existing one, I would email managers of the various departments to alert them. In turn, the managers inform their staff and ask them to review the document.
- **Track document usage.** The document library system includes a reporting feature. One report details document utilization, which tracks users' access of documents. Management reviews this report to see whether staff accessed the announced documents and to see who, in general, is using the library.
- **Make using the library 'rewarding'.** Using the documentation utilization report, we were able to see who was accessing the system. For those users who took quickly to using the library, we would recognize them with small awards. Free lunch passes, extra break time – anything to make staff want to use the system.

Our approach to a successful transition was two-fold: remove options that encourage old habits and provide new ones that educate, assist and encourage users to adopt new habits. Research shows it takes 21 days to form a new habit. After implementing this plan do we expect everyone to be a convert by day 21? Probably not. But with time, perseverance and perhaps some tweaking, staff should be well on their way.

Suzanne Quigley is a Documentation Specialist at Public Sector Partners, Inc. in Massachusetts. Ever versatile, she's also a part-time, freelance copywriter. Visit her Web site at www.catalog-copywriter.com.

Member Profile: Keith Mullen

Direction : What drew you to the field of P&P?

Keith : After graduation from college and getting married, I moved to Pennsylvania in 1981 without a job or even a real plan in mind, except a vague notion of writing a best-selling novel some day! So, my first stop was at a job agency in Tamaqua, Pennsylvania where I found a bulletin board posting for a technical writing position. Almost 30 years later, I'm still a technical writer with a vague notion of writing a best-selling novel when I retire someday!

Direction : Can you briefly describe your business background, Keith?

Keith: When I first applied for a job as a technical writer, I had no experience and no portfolio of writing samples, so I had to write a set of instructions for arc welding to prove I had an aptitude for the job. Although I knew nothing about welding, I did well enough to land the job, and I was immediately put to work writing training programs for the Boilermakers Union's apprenticeship program. Over the next decade, I wrote training programs for auto-related companies such as Subaru, MAACO, Alfa Romeo and Purolator. I was hired by Alcon Laboratories in 1990 and documented manufacturing processes for several years before being promoted to Documentation Department Supervisor.

Direction : Tell us about your work – responsibilities, challenges.

Keith : When I was first hired, Alcon had three separate change control systems: one for engineering documents, one for manufacturing processes, and one for quality control. One of my first projects was to combine these into one change control system. We called it the Document Approval Request (DAR) system. Then we had to combine the many Word and Excel logs into a database to facilitate data entry and automate most of the record and report generation processes.

Although DAR is essentially a paper based system with wet ink approvals, we created a web site integrated with our database that allowed users to search for effective documents based on document attributes and display and print not only the controlled documents but the related DAR records as well. This allowed us to eliminate binders of documents in non-production areas.

Direction: What do you like most about your job (past and/or present)?

Keith : Writing a good sentence is personally rewarding. Writing a whole paragraph of good sentences is something to be proud of. Stringing together enough paragraphs full of good sentences just might communicate a message worthy of consideration. The challenge and reward is the same, regardless of the topic.

Direction : What advice do you have for someone who wants to get into P&P documentation?

Keith : I would recommend looking for opportunities in the pharmaceutical and medical device manufacturing industries. The FDA regulations and ISO guidelines for quality systems creates a constant need to document policies and procedures and to write validation documents on product and process development activities.

Direction : What's the biggest communications challenge you face in your industry or specialty?

Keith : Balance. A writer not only has to meet the information needs of his intended audience (typically someone with a job to do) but must present the information in the leanest manner possible so that valuable time is not wasted trying to locate or comprehend the information. However, regulatory pressures tend to fatten publications with information intended for another audience: government, third party, corporate and internal auditors. The quality outcomes of your processes are the best indicators of the quality of your documentation; resist writing for the wrong audience.

Direction : Tell us a bit of personal information about you – e.g., hobbies, where you live, your family, or other information to help us get to know you.

Keith: My wife of 30 years, Mary Ann, and I have 4 grown children who still spend time with their parents. The many years of coaching and cheering at basketball, soccer, baseball and wrestling have come to an end; so, to fill the void, we have taken up country line dancing and are having a blast dancing with other parents that we used to spend time with on the side lines or in the gym.

You can contact Keith at Keith.Mullen@AlconLabs.com.

Use Our Resources to Learn About Books on P&P

By Emily Kowal

If you've just joined the Policies and Procedures SIG and you're new to the profession, you might think about getting some books to help you learn more about the policies and procedures specialty.

Get Started on the P&P SIG's Website

Our Web site will help you decide where to begin, direct you to books that may be best for you, and even give you the opportunity to help others find useful resources.

You can find a list to help you start your polices and procedures library on our Resources web page. These books explain everything from creating policies and procedures systems to illustrating differences between policies, procedures and work instructions.

Take Advantage of Our Book Reviews

You may wonder how to decide whether or not the books will help you in your work. Some of our members are kind enough to write reviews of books they read about policies and procedures, technical editing, and any others that they think might be useful for our profession.

In our newsletter archives, you can find reviews of People Skills for Policy Analysts (Q2 2009), Technical Editing—The Practical Guide for Editors and Writers (Q3 2008), The Basics of Process Mapping (Q3 2007) and Microsoft Word for Medical and Technical Writers (Q1 2008).

These reviews are written by and for policies and procedures professionals. Read the reviews then decide whether you want to add the book to your library.

Do Your Own Book Review!

After looking through the resources page and the archives of our newsletter, and maybe researching policies and procedures books online, you may find an interesting book that hasn't been reviewed yet.

If you write your own book review, the SIG will even buy the book for you! You won't have to spend your own money and you can support other members of the profession through your research, even if it turns out to be a book that they should steer clear of! You can also add a nice piece of writing to your professional portfolio.

Last But Not Least...Use the P&P SIG's ListServ

Now, what if you need a book that covers a topic more specifically, or you'd like more suggestions on books to read? Go ahead and ask your question on our ListServ discussion group. Someone will surely have some suggestions for you. And maybe some of our more senior members can recommend books that aren't already listed on our Resources page so we can add to it!

After using the Resource page on our Web site and finding out what other members think of different books, you'll be ready to start building – or adding to – your policies and procedures library.

Emily Kowal is our newest P&P SIG volunteer...see the Announcements page to learn more. You can contact her at ecelaric@gmail.com.

More Book Reviews Wanted — And We'll Pay for the Book!

Is there a book about technical communication you'd like to own? The P&P SIG will pay for your copy if you qualify for our book review program. How does it work? Up to four times a year, the editors of Direction will refund the cost of a qualified book on receipt of a book review and a purchase receipt.

Book selections must be approved by the SIG Co-Managers based on applicability for our readers and to some extent, price. The book must also be available for purchase by other members (i.e., still in print).

Email your proposal to lois.marsh@bmo.com including the title, author, price, and ISBN number.

Announcements

Emily Kowal Joins the SIG Leadership Team

A warm welcome to Emily Kowal who recently joined our SIG's volunteer team.

Hello! I've volunteered to help the SIG with welcoming new members and by creating some educational materials for the Web site.

I'm a procedures analyst working for Walgreens Health Services, a division of Walgreen Co. I write a little, but mostly I edit policies, SOPs, forms, standards, and templates. Because I help many departments, I've been exposed to a wide variety of policies and procedures.

Before Walgreens, I spent a year teaching English at three high schools in Japan. I have an M.A. in rhetoric and professional writing and a B.A. in English with a minor in Linguistics.

In my free time, I enjoy reading, writing, playing video games, making music, knitting, and shooting a longbow once in a while. I live just north of Chicago with my awesome husband, Jim, and our cat, Sif.

Do you have any ideas for welcoming new members? And what kinds of educational materials would you like to see?

Any suggestions are welcome! Email me at ecelaric@gmail.com.

Emily Kowal