STEPS & SPECS

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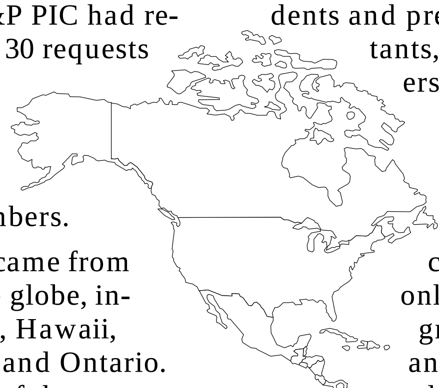
P&P PIC Receives Multiple Information Requests from Readers Worldwide

by Raymond E. Urgo

By the end of the 1995-1996 fiscal year, the P&P PIC had received more than 30 requests for information, referrals and assistance from both STC members and nonmembers.



The requests came from many parts of the globe, including Bermuda, Hawaii, British Columbia and Ontario. Nearly one-third of the requests came from California.

Persons seeking the PIC's assistance held positions ranging from procedures analysts, writers, managers, vice presidents and presidents to consultants, contractors, teachers and students.

The most popular requests were for information on how to bring policies and procedures online, lists of bibliographic references, and the latest trends and practices related to P&P communication.

While it is difficult to know how helpful and effective the PIC was in responding to such requests, we are hopeful that we were able to put people on the right track to meet their needs.

A special thank you is extended to those PIC members to whom information requests were referred. In some cases, we were able to network people with mutual interests who were more than 3,000 miles apart.

As a result of the PIC's correspondence with some of the persons requesting assistance, the PIC—and sometimes STC itself—gained new members.

See REQUESTS, p. 4

PIC Members To Present Panel Discussion at STC Region 8 Conference

Focus Is P&Ps in Today's Business Environment

by Jerri L. Houdayer

P&P PIC members from four different industries in California—car leasing, regional banking, training consulting and P&P consulting—will be presenting their perception of P&P development in a session at the STC Region 8 Conference scheduled for October 25-27 in Southern California.

Raymond E. Urgo (Los Angeles chapter) and **Don Kirtland, Bill Darnall** and **Michelle Anderson** (all of the Orange County chapter) will discuss P&P development and usage in today's businesses, offering real-time information on successful P&P development and usage.

Topics of discussion include the following:

- Trends in P&P development
- Lessons learned in placing P&Ps online
- How to use P&Ps on a local area network
- Synergy between instructional design material and P&Ps

Today's businesses have a greater than ever need for documenting standard methods and for the establishment of guide-

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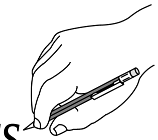


Letters

Congratulations to all who had a hand in the prizewinning newsletter. I've just read the June edition and would like to subscribe. I maintain the Policy Manual at Williams Pipe Line Co. in Tulsa (Oklahoma).

Ellen G. Fly
Oklahoma Chapter

Letters to the editor—positive, negative, indifferent—are always welcome. Send your comments to STEPS & SPECS *Editor, 1638 S. Lincoln Street, Kent, OH 44240-4449.*

P&P PIC Team Leaders Set Goals and Timetable for 1996-1997 Fiscal Year

by Raymond E. Urgo

As the PIC enters its third year, we want to build on the strengths of our past.

Here are the goals that the PIC's team leaders have established for the 1996-1997 fiscal year:

Membership (Jerry Laing)

- Develop a membership database from existing information by 12/96
- Use the membership database to create a membership directory by 2/97
- Use the membership database to create a membership profile by 2/97

Programs and Projects (Jerri Houdayer)

- Coordinate the submission of P&P presentation proposals for the 1997 STC conference by 8/96

See GOALS, p. 4.

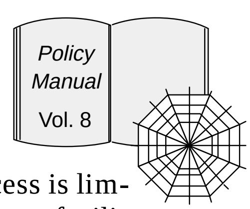
One Company's Solution Is Webbed Policies

by Adrienne Escoe

What does a litmus test have in common with the Web?

Plenty—if you want trim, easy-to-find company policies.

The Aerospace Corporation is celebrating what is possibly an industry first. The El Segundo, California–based company recently pared down its policies and practices to about half their former volume. Then it created an internal Website for fast information retrieval. Although access is limited to company facilities, thousands of employees can now obtain current management and operating guidance instantaneously.



Gone are the dusty, cumbersome, hardcopy manuals, expensive to maintain and obsolete moments after a new policy or practice is released.

"What a relief to not have to hoist multipound volumes about and search for some elusive detail in a policy!" said **George A. Paulikas, Ph.D.,** executive vice president, in a congratulatory e-mail message to the company's implementation team.

How did the team do it? Through the miracle of chemistry.

With guidance from **Adrienne Escoe, Ph.D,** president of Escoe/Bliss Commu-

See WEBBED, p. 3.

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P&P Tip Sheet

How Much Documentation Is Enough?

Too much documentation can be as bad as too little. So how do you know when enough is enough? One way to keep documentation restricted to what is essential is to ask the following questions:

Q1: Should the individuals, with the skills they have, be able to complete the task?

Q2: Does the company have a unique way of completing the task (e.g., unique forms, routines, reporting structures)?

By plotting the answers to these questions as shown in the table below, the need for documentation and training becomes obvious.

Matrix for Determining Adequate Documentation

	Response		
Question #	**Yes**	**No**	**Comment**
1	✓		No procedures are required.
2		✓	No procedures are required.
1	✓		Procedures are required.
2	✓		Procedures are required.
1		✓	Procedures and training are required.
2	✓		Procedures and training are required.
1		✓	Employee should not be in this job.
2		✓	Employee should not be in this job.

Tip Source: **Ralph Robinson,** a senior member of STC's Toronto chapter.
Note: This information originally appeared in the June/July 1996 issue of *Intercom*.

Tips for P&P writers, editors and managers are always welcome. At least one tip will be published in each issue. Send your tips to STEPS & SPECS *Editor, 1638 S. Lincoln Street, Kent, OH 44240-4449.*

WEBBED

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nication, the team used a zero-based approach. Rather than deciding which existing documents could be sacrificed, the team assumed none were needed and added one only if it passed the following litmus test:

- Is it required by law?
- Is it specified by contract?
- Is it necessary for prudent business operations?
- Would any harm come to the company if it were cut?

Streamline the hardcopy manual before taking it online.

Four no's, and the document was history.

The format and wording of needed policies and practices were tightened up for speedy comprehension.

Finally, the team developed the internal Website to replace expensive hardcopy distribution and maintenance.

Few companies understand the true costs of a paper manual. They can add up the obvious expenses, such as printing and paper.

The most expensive part, however, is usually hidden. It's like an iceberg—the part you *don't* see, literally, can sink a ship. Liability, maintenance, inaccessible information are just a few of the costly elements that can affect profits directly.

Few companies are aware of the true costs of producing a paper manual. The most expensive parts—including inaccessible information and liability—usually are hidden and can have a direct negative impact on the bottom line.

But don't just take a manual and put it online.

Streamline the documentation first, then make it accessible electronically. That's a dazzling combination—one that works especially well for economical ISO 9000 documentation.

Adrienne Escoe, Ph.D., *publishes the newsletter* The Escoe/Bliss Insider for World Class Systems and Procedures, *in which this article originally appeared. She can be reached at 310/430-6479.*

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lines and rules by which procedures and tasks are performed.

Businesses are realizing that to make policies and procedures value-added, they need to be acccessible, easily updated and written to the needs of users.

***Jerri L. Houdayer** is a member of the Orange County chapter of STC and heads the Programs and Projects team for the Policies and Procedures PIC. She will be moderating the P&P panel presentation.*

In the News . . .

Look for “Policies and Procedures PIC Fills Unique Technical Communication Niche,” by PR Team Leader **Nancy F. Demeter,** in the October *Intercom*.

GOALS
Continued from p. 2

- Coordinate and promote P&P presentation sessions for delivery at the 1997 STC conference in Toronto, Canada, by 5/97
- Compile annotated resource lists of P&P seminars, books and other items by 12/96
- Encourage members to enter P&P publications competitions and to serve as judges for such events by 11/96
- Explore (and possibly begin) a PIC-sponsored research project in 1997 by 5/97

Public Relations (Nancy Ford Demeter)

- Submit an article about the PIC to *Intercom* by 12/96
- Seek volunteers to promote the P&P PIC at the regional and chapter levels by 12/96
- Establish and maintain a PIC Web page by 2/97
- Establish contacts with other PICs and outside organizations as needed

Newsletter (Audrey Cielinski Kessler)

- Publish four editions of the PIC’s newsletter
- Enhance newsletter quality based on judges’ advice from 1996 STC newsletter competition by 9/96
- Include articles from non-STC sources by 9/96
- Enter newsletter in 1997 STC newsletter competition

Work on achieving these goals is under way. Your input can help ensure their success.

***Raymond E. Urgo** is principal of Urgo & Associates, a member of the Los Angeles chapter of STC and manager of the Policies and Procedures PIC.*

REQUESTS
Continued from p. 1

If you were one of the persons who requested information or responded to a request, we would like to hear from you. We may publish some of the responses in future issues of the newsletter. So share you experience with the informal information-exchange program.

Send or phone in your comments to me or to *STEPS & SPECS* newsletter editor **Audrey Cielinski Kessler.**

***Raymond E. Urgo** is principal of Urgo & Associates, a member of the Los Angeles chapter of STC and manager of the Policies and Procedures PIC.*

P&P PIC Information Requests, FY 1995-1996

Category	Type of Information Requested
Talent	• Position openings • People seeking positions
Documentation	• Samples of P&P documentation • Measurement of P&P document usage • Methods for P&P development • P&P trends and practices
Technology	• Transition to online P&Ps • Electronic forms & computer screens for P&Ps • Software for ISO 9000 documents & flowcharting procedures
Learning	• P&P courses • P&P counterparts in business and industry

QA

Q ***Why are procedures important?***

A Procedures are important for a number of reasons. An obvious reason is that they tell people how to perform a particular task. The task can be simple or complex, but with written procedures in place, there is less chance of human error and possible adverse consequences. Procedures manuals also provide "proof" of how a task should be executed, establishing a common way of getting things done.

Q ***How important is style consistency in policy and procedures manuals?***

A Very important. While it may seem to be nitpicking to worry about such things as which words should be capitalized or lowercased, how certain words should be punctuated (e.g., hyphenated vs. nonhyphenated), how commands and screen titles are denoted, having the little things consistent throughout one document (and among related documents) helps the reader follow (and perhaps also comprehend) more easily the information presented. It's also helpful to have these style conventions documented. You don't want writers and editors to have to thumb through a stack of manuals to find the correct style. Keep it all in one place for easy reference.

Q ***How much detail should a procedures manual contain?***

A That depends on who the audience is and how the document will be used. If you are writing a procedure manual for a complex piece of hardware or software, for example, you are likely to want to include a significant amount of detail. On the other hand, a user manual may not require as much detail, since often a user simply wants to know how to get something done—not all the how's and why's and wherefore's that a technical systems analyst may want and need. Your best strategy, then, is to analyze your audience to determine their needs and the level of detail they require to get the job done.

Q ***My policy and procedures manuals typically are several hundred pages long. What are some efficient ways to keep these current without having to reissue the entire tome?***

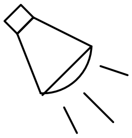
A One way to do this is to publish and distribute update pages for the existing manual that the user can either add to or replace what already is in the book. If the number of update pages is greater than the number of pages the updates are replacing, you will want to use a numbering scheme to keep the page numbers before and after the inserted pages the same as they had been. For updates inserted between pages 3 and 4, for example, you could use a scheme such as 3.1, 3.2, 3.3 before resuming with the existing page 4. Also be sure to issue a new table of contents and index along with the update pages. And be sure that the manual uses a binding method that allows for easy insertion of new and removal of existing pages.

Q ***Is it necessary for the illustrations used in a procedures manual to have an accompanying figure number and explanatory caption and be referenced in the text of the document?***

A If the manual contains only one illustration, a figure number is not necessary, though a text reference to the figure is a good idea. For manuals with several illustrations, figure numbers can help the reader find the referenced item easily. Figure numbers are helpful as well when a cross-reference is made to an illustration that first appeared in the pages preceding the subsequent reference and when more than one illustration appears on the page to which the cross-reference is made. Inclusion of figure captions also is a good idea. Captions let the reader get in a nut shell the point you are making with the illustration—without having to plow through the usually more lengthy explanation in the body of the text.

Source: ***Audrey Cielinski Kessler.*** *Kessler is editor of* STEPS & SPECS*, the owner of The Write Hand and a member of the Northeast Ohio chapter of STC.*

P&P Coming Attractions . . .



Seminars and Conferences for the P&P Professional

October 25-27
STC Region 8 Conference
Costa Mesa, California

Panel on P&P topics; workshop on procedures flowcharting

Contact: Elaine Randolph, Program Chair; 714 / 380-6128 or erandolph@po5.mv.unisys.com

October 30-November 1
Eighth Annual Utility Service (NUS) Procedures Symposium
Clearwater Beach, Florida

"Sharing to Meet the Competitive Future"; about sharing among the nuclear communities and with entities outside the industry

Contact: 800 / 368-2755 ext. 2542

April 1-4, 1997
Procedures in the 21st Century: A Procedure and Trade Show
Colorado Springs, Colorado

Designed to bring together procedures professionals and software and hardware representatives to discuss the needs of procedure users and the new technologies available that may change how procedures will look in the 21st century.

The conference will consist of presentations and breakout sessions.

Space will be provided for vendors to display their products.

Contact: Phoenix Publications, 201 / 989-5455 (phone and fax)

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The mission of the Policies and Procedures professional interest committee is to assist STC members in developing, implementing and managing policies and procedures communication through educational and networking opportunities, STC conference sessions and publications, and communication with other STC PICs and professional organizations in areas of common interest.