Reminders

Letters to the editor are always welcome.

Send your comments to:

Kathy Craddock,
Steps & Specs Editor
103 Blueridge Road
Carrboro, NC 27510

The deadline for articles for the March issue of *Steps & Specs* is February 15.

E-mail Kathy at dizsuitsme@aol.com with articles.

Your Turn

Steps & Specs invites you to share your expertise with our readers. If you have thoughts or suggestions about the following questions, please speak up and let us know:

What type of font should I use in hardcopy documentation?

Should I use the same one for online documentation?

Send replies to:

Kathy Craddock,
Steps & Specs Editor
103 Blueridge Road
Carrboro, NC 27510

or e-mail dizsuitsme@aol.com

Membership Report

This quarter's membership report reflects changes to the P&P SIG's membership since September.

The membership continues to grow and now stands at 1,131. Of that number, 67 are new members since September.

If you have any questions regarding your P&P SIG membership please contact Candie McKee at candie_mckee@yahoo.com.

Do you know someone who wants to join the P&P SIG? You can find information on the SIG's Website at:

http://www.stc.org/pics/ppsig/www/index.htm

Steps & Specs
Kathy Craddock, Editor
103 Blueridge Rd.
Carrboro, NC 27510

The mission of the Policies and Procedures special interest group 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 SIGs and professional organizations in areas of common interest.

Vol. 6/ No. 4/ December 2000

Steps&Specs

The newsletter of the STC Policies and Procedures Special Interest Group

STC society for technical communication

Documenting Procedures, How Many Steps Is Enough?

by Tara English-Sweeney

Have you ever documented a particularly grueling procedure? You research, write, read, revise and repeat. Just as you finish, you're feeling pretty good. Then, you start to wonder. Was there a way I could have done this better? Or, maybe, just maybe, I did this the best way possible.

This article grew out of a message I posted to TECHWR-L (a discussion forum for technical communication topics). It summarizes a discussion about the maximum number of steps a procedure should have. A slightly revised version of my original message follows:

> I have always tried to maintain a reasonable number of steps in procedures so as not to intimidate the reader. However, in my current project, there is a procedure that takes 19 steps to complete. Users navigate through several screens, completing multiple fields along the way. They cannot exit in the middle of the procedure, nor can they successfully pick up from where they left off.
>
> I have condensed the number of steps quite a bit. For example,
>
> 1. Complete the fields as shown in **Figure 1.4 Presentation Information**, below.
>
> In the **Presentation Name** field, type a name for the presentation.
>
> In the **Presentation Type** drop-down list, select the type of presentation you are creating.
>
> In the **Topic** field, type a description of the topic to be covered.
>
> In the **Presenter** field, type the presenter's name.
>
> [The screen capture of the Presentation window goes here.]
>
> 2. Click **Next**.
>
> Normally, if I had a procedure that required 19 steps, I would break it up into several shorter procedures. For example, I might consider creating two separate procedures, one that covers steps 1 - 9, and another that covers steps 10 - 19. In my current project, that just does not make sense to me.
>
> My questions to all of you TECHWHIRLERs are:
>
> What do you think about a procedure that has 19 steps?
>
> Do you limit the number of steps in a procedure?
>
> If so, how do you handle it in a situation that seems unavoidable?

I compiled the flurry of responses that I received into the following summary. Several people approved of the "one numbered step per window" method, as demonstrated above. I took Sharon Burton-Hardin's suggestion to move the "Click Next" instruction up, so that it is included in the previous step. As Burton-Hardin said, "I have found that this chunking makes sense to the users because they get a new step as they change screens, which is a logical chunk to them." Others suggested using a table to list the fields and their descriptions.

The majority of respondents believe that procedures should contain as many steps as necessary to complete the task. Others indicated that longer procedures tend to

Documenting Procedures, continued on page 9

In This Issue:

Steps & Specs is published quarterly by the Society for Technical Communication's Policies and Procedures Special Interest Group.

Editing/Design/Layout

Kathy Craddock
919/966-7904 (office)
919/968-6489 (home)
dizsuitsme@aol.com

P&P SIG Team Leaders

Audrey Cielinski Kessler, SIG Manager and LISTSERV
330/677-8598 (office & fax)
330/677-1168 (home)
audck@aol.com

Candie McKee, Membership
818/557-0805
(home/office/fax)
candie_mckee@yahoo.com

Luette Arrowsmith, Webmaster
312/606-5563 (office)
708/681-4595 (home)
larrowsmith@usg.com

Kathy Craddock, Special Projects
919/966-7904 (office)
919/968-6489 (home)
dizsuitsme@aol.com

Raymond E. Urgo, Immediate Past Manager and Information Request Coordinator
323/957-9317 (office)
rurgo@aol.com

Send contributions to:
Kathy Craddock
103 Blueridge Rd.
Carrboro, NC 27510
dizsuitsme@aol.com

Society for Technical Communication
901 N. Stuart Street, Suite 904
Arlington, VA 22203-1822
703/522-4114 (office)
703/522-2075 (fax)
http://www.stc-va.org

Articles accepted for publication are subject to editing for clarity, style and space.

Manager's Column

by Audrey Cielinski Kessler

Change. Sometimes we ask for it. Sometimes it simply befalls us. But in either case, change can be a good thing. It can bring with it new faces and fresh ideas, a new perspective and the prospect of greater achievements.

And so it is with the Policies and Procedures SIG. As you can see from the staff box at left, three team-leader positions—newsletter, Web page and membership—have changed hands over the past couple of months. From all indications so far, each is in very capable hands.

The now former newsletter editor, **Luette Arrowsmith,** is the SIG's new Webmaster. She has plans for upgrading and enhancing the site to make it more useful and beneficial to the SIG's members. If you have any ideas for Web content, e-mail Luette at larrowsmith@usg.com.

Kathy Craddock, who also heads the special projects team, has assumed the role of newsletter editor. She, too, has some interesting ideas for beefing up the quality, content and variety of articles in each issue. To make it all happen, though, Kathy needs your input—in the form of an article or brief how-to tips for working smarter or more efficiently or overcoming a P&P-related challenge. I know that all of you have knowledge and expertise in at least one area of P&P communication, even those who are new to the discipline. I urge you to share what you know with the SIG membership. To offer your help, contact Kathy at dizsuitsme@aol.com.

Responsibility for the membership team is now in the capable hands of **Candie McKee,** who had been assisting former membership team leader **Joy Osaka-Lu.** Joy has done an outstanding job of overseeing the preparation and mailing of numerous new-member packets each month, maintaining a database of members' interests and areas of expertise, and keeping tabs on the SIG's changing membership totals provided by the STC office in Virginia. If you would be interested in helping Candie with the monthly mailings or other membership tasks as the need arises, you can reach her at candie_mckee@yahoo.com.

Change. However it comes, however it finds us, always brings with it an opportunity for growth, for something new, even something unexpected. For the Policies and Procedures SIG, I anticipate all this, and more, in the months ahead.

Audrey Cielinski Kessler is the owner of The Write Hand, a writing, editing, desktop publishing and Website design company in Kent, Ohio, a senior member of the Northeast Ohio chapter of STC, and manager of the Policy and Procedures SIG.

Correction to the September Issue of *Steps & Specs*

In the review of Stephen Page's book, ***Establishing a System of Policies and Procedures,*** it was stated that the Capability Maturity Model was developed by the Scientific Engineering Institute. It actually was developed by the Software Engineering Institute at Carnegie-Mellon University. We regret this error.
The Editor

Job, continued from page 10

upstage a client or cause embarrassment or, worse yet, an adversarial relationship.

So there you have it. I showed two young editors how they could make the boring more interesting if they chose to do so.

What I did in my set of circumstances may not work for you in yours. I hope I have shown you one way in which boring, routine tasks can be made more interesting and at the same time help you build your reputation as a knowledgeable, supportive member of the team who adds value to the end product.

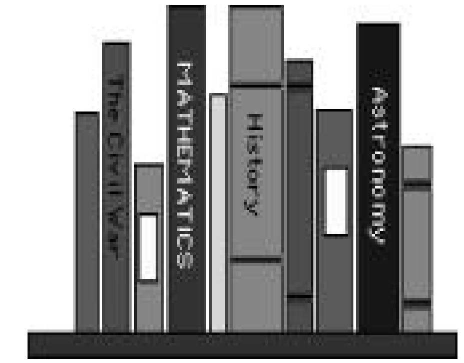
Dan Wise, a technical editor for the Southern Building Codes Congress International in Birmingham, Alabama, has been a technical communicator for 45 years. Wise holds a bachelor of science in Industrial Administration from Iowa State University and a master's in business administration from the University of Alabama in Birmingham. Dan is an associate fellow of STC, was honored in 1981 with a Distinguished Technical Communication award and in 1995 with a Distinguished Chapter Service award.

Coming in March

Watch for the information about the Policies and Procedures SIG and its participation at STC's 48th Annual Conference held in Chicago, Illinois in May 2001. The March issue of *Steps & Specs* will have information about P&P presentations, the SIG's annual business meeting, ways to get involved with fellow P&P communicators at the conference and tips and hints to make this a great conference.

All coming in March 2001!

Happy Holidays!



Book Review

Achieving 100% Compliance of Policies and Procedures

by Luette Arrowsmith

Stephen Page's "*Achieving 100% Compliance of Policies and Procedures*" is a high-level guide for the novice procedure analyst. The book is divided into three parts. Part one incorporates the theories of Dr. Edward Deming, an expert known in the manufacturing world for his theory of continuous improvement. Page applies Deming's theory to the creation and maintenance of policies and procedures. Part two focuses on designing and carrying out a compliance plan which includes system audits to identify system failures and operating deficiencies in business processes. Part three discusses incorporating identified improvements and achieving cost savings.

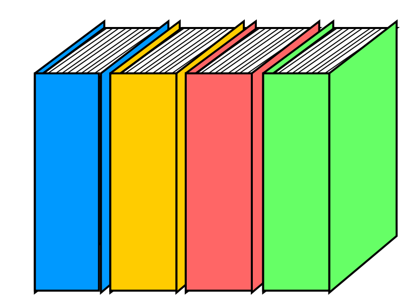
The book is designed to improve the knowledge and competencies of the novice procedural analyst by providing checklists that are useful when planning or incorporating policies and procedures into the working environment. Page refers to it as his "how-to" book for measuring the effectiveness of policies and procedures. Page argues that policies and procedures determine the organization's percentage of compliance. If need be, says Page, the policies should be reviewed and changed in order to minimize noncompliance.

Page uses Deming's theory of continuous improvement to demonstrate how the system works for creating and maintaining policies and procedures and provides useful steps for applying the theory to your organization. Page uses his business experience at Qwest in Dublin, Ohio, as a case study throughout the book.

If you are just starting out in your career as a procedure analyst Page's book is just right for you. The book also has a helpful audit process if you are looking to incorporate such into your own processes.

Visit http://www.companymanuals.com/compliance/index.htm for more information.

Luette Arrowsmith is the project leader for technical communication at USG Corporation. Luette's involvement with the P&P SIG has spanned five years. She now serves as the SIG's Webmaster.



Making the Job Interesting: One Writer's Approach

by Dan Wise

Throughout most of my 21-year career as a technical communicator for a large utility company, I was responsible for, among other things, editing engineering and administrative procedures written by engineers and methods analysts. I found ways to make what could have been a tedious job interesting and was quite surprised to overhear a conversation between two of our younger editors. It went something like this:

Young Editor No. 1 (YE1): This job is killing me. It's sooo boorriinngg! All I do is check spelling and grammar. I'm about to die of boredom!

Young Editor No. 2 (YE2): Yeah, me too. The last procedure I got had exactly *one* minor change in one paragraph. Took me all of 5 minutes to take care of it.

YE1: "Do you suppose we'll ever get to do something interesting?"

YE2: [with a chuckle] "I don't know. I might just go ahead and die before I find out."

After a couple of other exchanges in this game of *Ain't It Awful!* I poked my head around the cubicle partition and told them, "You two just don't know how to play the game if you find it boring."

By flowcharting the procedure, I was able to determine whether process flow was orderly from A to B to C.

I got a couple of "Huh?" responses and then proceeded to tell these two what I routinely did with procedures to stave off boredom—and add value to the procedure. I took the procedure that had only one minor change in it and showed the two young editors that more than five minutes of work was needed to "make it right."

Procedures written by engineers and methods analysts, in this company at least, were often written on the basis of the author's personal experience (that's the way I do it) or as a result of the analyst interviewing one or more engineers (or others) who actually did the work. In both cases, the author's understanding of the procedural steps was not always perfect. I found that the documented procedure was incomplete in some cases, defied logic in others and was outright wrong in a few. And changes to procedures were not always thought out thoroughly or examined for their impact on other sections of the same procedure or on other procedures that dovetailed.

How did I determine this? Flowcharting.

By flowcharting the procedure presented to me for editing, I was able to determine whether process flow was orderly from A to B to C, etc. and whether steps or responsibilities were duplicated, as well as whether branches led to dead ends or sailed off into infinite space.

I well remember one such instance. A methods analyst brought a "finished" procedure to the Publications Department for editing and publication. My flowchart showed that three different staff positions had been assigned the same responsibility and that three copies of the documentation forms vanished into space. When I first presented these results to the analyst, the response I received was, "well, that's the way the people at the plant site wrote it."

The analyst then studied my flowchart, was satisfied that it was accurate and agreed that there were problems. The draft procedure and my questions were sent back to the author. Six months later, plant engineering still had not resolved the issues, but they had agreed that my flowchart accurately portrayed the text of the procedure. They just hadn't decided how to correct the conditions I had questioned.

Flowcharting showed three different positions had been assigned the same responsibilities.

Did I earn my salary? I believe I did. Did I have fun doing it? You betcha!

My job was always so much more than routine checking of punctuation, spelling and grammar. I took responsibility for verifying other people's work. Most of them appreciated what I did. I often saved them embarrassment by catching flaws before management found them or before they turned up as an audit finding from a client's Quality Assurance Department. I also helped my department grow in stature by building confidence in my clients.

One caveat, though. I'm sure most, if not all, of you have had drilled into you not to approach your client aggressively or antagonistically. My approach was always to ask questions in an effort to gain a clear understanding of the situation. Usually I was able to ask questions in a friendly or neutral way and let the author come to the conclusion that something was amiss when answers led to still more questions—quite often in the mind of the author. I was content to let the author discover the error or omission on his own. I tried never to

Job, continued on page 11

Member Profile: Sue Wolford

Steps & Specs is pleased to bring back a past newsletter feature, the Member Profile. This month we're pleased to introduce **Sue Wolford**. If you would like to be profiled or know of a SIG member who should be considered, contact Kathy Craddock, *Steps & Specs* Editor, 103 Blueridge Road, Carrboro, NC 27510, 919/966-7904.

S&S: How did you become involved in P&P communication? Was it by design or default (by accident)?

SW: I'd have to say my entrance into the wonderful world of policies and procedures was quite accidental. In a previous work life I worked with the programming staff in helping them pull together their standard operating procedures. They wrote them, and I cleaned them up. Then, they told me everything I did wrong in the cleanup. It was a good lesson.

While the programmers cared deeply about how their code was keyed, they really didn't care if the accompanying text made much sense. They just didn't like anyone making changes to what they'd written, so I'd sneak in some clarification here and there. If I didn't hear back, I knew I was successful.

S&S: Can you briefly describe your background for our readers?

SW: Educationally, my background includes a B.A. in English from Ohio State University and many, many continuing education programs through STC and other available resources. Work-wise, I spent about 19 years in Office Automation before switching over to technical communication. I did a lot of tech comm work in office automation and some office automation work once I moved to tech comm. Each step I took along the way prepared me for the next.
S&S: Where does P&P fit into your organization?

SW: Here at Chase Mortgage, it falls into the risk management world. This puts us on the same team that works with auditors. So much of what we write or rewrite is based on what auditors find when they come in to review our business practices. This gives us a direct line to what the business really needs from policies and procedures.

S&S: And what role do you serve?

My title is manager. I manage the process by guiding the work, providing advice, editing when I can and tracking the documents. I also talk to the users, give them an overview of what we do and how we do it. I also try to build bridges between us and potential sources of information.

S&S: What do you say when someone asks you, "What do you do?"

One thing that makes us good P&P communicators is that we use all our communication skills. Not only do we write for a specific audience, we listen to our subject matter experts as they explain processes.

SW: When people give me the "deer in the headlights" look when I mention technical writing, I tell them I write instructions for people that explain how to do a job. It's like writing software manuals for people, telling them how to do their everyday work.

S&S: How do you define P&P?

SW: Policies and procedures at Chase Manhattan Mortgage Corporation include desk instructions, system information and corporate policy all rolled into one document. Each one of our documents contains information on a single process. We've always mixed the policy information in with the procedures. Our documents explain why we have to process loans a particular way. Then they write the detail on how we carry this out.

S&S: What makes you a good P&P communicator?

SW: One thing that makes us good P&P communicators is that we use all our communication skills. Not only do we write for a specific audience, we listen to our subject matter experts as they explain processes. If they start to explain a complicated process, we pay close attention because this is one area we have to write particularly well. When we explain complex information in easy to read terms, we've hit the jackpot.

Then, we take time to test procedures, to make sure that someone who has never completed the process can follow your written instructions. If one person doesn't understand the process, many, many more will misinterpret what you wrote as well. Testing is a critical part of our success.

S&S: What are the key talents, interests, education and personality characteristics of a successful P&P communicator?

SW: The key to longevity for a P&P communicator is patience and a strong desire to learn what makes a business tick. A sense of humor is a big plus. All of this is contingent on excellent skills in writing and general communication.

While we know what makes documentation good, our customers don't always recognize these traits. All good P&P communicators know they have to occasionally give in to the less than

Member Profile, continued on page 8

Introducing Your SIG Team Leaders and Some New Faces

by Kathy Craddock, Editor

Welcome . . .

The Policies and Procedures SIG is pleased to welcome the following individuals as our team leaders. As always, you are encouraged to participate on any of these teams. Each has a variety of responsibilities and each leader would be happy to have your help. You may contact any of the team leaders at anytime. See page 2 for contact information. We look forward to another great year sharing our knowledge and working together.

Membership Team Leader: Candie McKee
Candie is a senior technical communicator with Netplex Group in Edmond, Oklahoma. Candie also works as an instructor for the University of Central Oklahoma. She has been a member of STC for six years and has been very involved in the Oklahoma chapter, serving "in every position available." Candie brings lots of experience to the P&P SIG having worked in a variety of different aspects of the technical communication field. In the future, she would like to work overseas and earn her doctorate in technical communication. We wish her luck in those pursuits!

Webmaster: Luette Arrowsmith
Luette is the project leader for technical communication at USG Corporation. Recently her work has focused on putting many of the company's corporate policies on the Intranet. Luette's involvement with the P&P SIG has spanned five years during which she served as co-editor and then editor of *Steps & Specs* and now as Webmaster. Luette lives outside of Chicago, Illinois, and enjoys life with her family, taking pictures and writing poetry.

Newsletter Editor: Kathy Craddock
Kathy is a Web Documentation Specialist in the Information Technology group of the University of North Carolina Health Care System in Chapel Hill, North Carolina. She specializes in the design, development and maintenance of Web delivery of divisional standards, policies and procedures and maintain the organization's intranet Website. Kathy is a senior member of the Carolina chapter of STC, has been active in the P&P SIG since it formed in 1994. Kathy is looking forward to continuing her work with the SIG in this new role.

Thank You . . .

In addition to welcoming these folks in their new roles I want to thank the following for their work in the past months.

Joy Osaka-Lu
Joy worked on the membership team since 1998 and served as team leader since 1999. Joy is a freelance writer in Glendale, California. During her work with the P&P SIG Joy and SIG manager Audrey Cielinski Kessler developed the new member survey, a welcome packet and a new-member database which is used for several different purposes.

Susan Sereno
Susan has been active in STC since 1993, the year she earned her master's degree in technical and professional writing from Northeastern University. Currently, Susan is vice president of Moreira Consulting and specializes in Web objects development. As a member of the P&P SIG, Susan served as the production and layout Specialist for *Steps & Specs* and is looking forward to working with SIG Webmaster Luette Arrowsmith on the updates and new design of the SIG's Web site. In her free time, Susan enjoys spending time with her husband and two-year-old, Jackie.

Kris Henige
Kris served as Webmaster from 1997–2000 and also served as the PR Liaison from 1999–2000. She is a technical communications manager at Parker Hannifin Corporation in Cleveland, Ohio, and currently serves as vice president of the Northeast Ohio Chapter of STC.

Luette Arrowsmith
Luette took over as editor of *Steps & Specs* early in 2000 after serving as co-editor. Luette worked on the redesign of the newsletter and continued the tradition of entering *Steps & Specs* in the STC Newsletter competition. Winners will be announced in the spring and be on display at the 48th Annual Conference in Chicago in 2001.

Join in on the conversation and stay in the know.

Communicate with fellow Policies & Procedures SIG members by joining the P&P SIG's LISTSERV.

See page 6 for details on subscribing and posting your questions and suggestions to the list.

Documenting Procedures, continued from page 1

be more difficult and intimidating. I was reminded by several people, including Jason Willebeek-LeMair that ". . . Miller's seven +/- two rule shows that people hold five to nine objects in short-term memory. It has nothing to do with documentation . . ." Although Miller's rule does not apply to most documentation situations, it reminds us that chunking information into smaller units makes it more manageable. However, the only real way to know if your documentation is effective is to test it on real users.

If you are writing for less technical people you might consider ways to break up a long procedure.

Although there are no hard and fast rules, you can apply some guidelines to writing procedures. These may not decrease the number of steps, but they may help increase your chances that each step is a necessary one.

Know Tour Target Audience

This is valuable information. If you are writing for technical people who are comfortable with long or difficult procedures, a 45-step procedure will not be daunting to them. On the other hand, if you are writing for less technical people, you might want to consider ways to break up that 45-step procedure or at least make it seem like there are fewer steps. Tim Altom suggests that if you cannot pinpoint your target audience,
". . .break the task down into smaller steps. That way skilled users can breeze through them, while novices can benefit from the granularity. . . ."

Break Procedures Into Logical Chunks

There is no rule of thumb for chunking. Simply determine the most logical place to break. The earlier example demonstrated this by starting each step at a new screen. This seems to work best when the reader can understand the logic behind the segmentation of the procedure.

Begin Each Logical Chunk With the Number *1*

Although the total number of steps does not change, the last number the user sees is not quite as large. As Geoff Hart suggests ". . . when you start each new chunk, you still have the same total number of steps, but each chunk looks less intimidating because it ends with a smaller number on the last step."

Keep the User Informed

If your readers must complete a large number of steps in one sitting, tell them so and then provide the estimated time to completion. Also, tell your readers up front what they will need to complete the procedure (for example, an internet protocol address or a serial number).

Suggest Changes

As technical communicators and champions for our users, we often see ways to simplify procedures. Whether you tell the application developer, the engineer, or your boss, suggest ways to improve the user's experience, if possible.

Tell your readers up front what they need to complete the procedure, for example, an internet protocol address or a serial number.

Test Your Documentation

Many of us, including myself, write documentation and never get feedback from real users. I am willing to bet that it is not that we don't want to hear what our users have to say. Other things get in the way, such as corporate politics or people who think of documentation as a "nice to have." However, testing your documentation really is the *only* way to measure the usability and effectiveness of your documentation.

For further reading on this topic, please see the following:

Hart, Geoff. 2000. "Ten Technical Communication Myths." *Technical Communication*, V. 47, No. 3 or http://www.raycomm.com/techwhirl/tenmyths.html

Miller, G. A. 1956. "The Magical Number Seven, Plus or Minus Two: Some Limits on our Capacity for Processing Information." *Psychological Review* 63, no. 2:81-97.

Norman, Donald. 1993. *Things That Make Us Smart*. Addison-Wesley Publishing Company Inc.

TECHWR-L archive (search for the subject "number of steps per procedure").

Special thanks to the following people for their responses: Tim Altom, Dan Brinegar, Kathy Craddock, Hedley Finger, Sharon Burton-Hardin, Paul Hanson, Geoff Hart, Brent Jones, Steve Jong, Lisa Kemp, Chuck Martin, Bill McClain, Tom Murrell, Dan Roberts, C. Spurr, Scott Turner, Jason Willebeek-LeMair, Richard Wollt

Tara English-Sweeney is a senior sechnical writer and analyst at Novadigm Inc. (www.novadigm.com) in Mahwah, NJ. She has worked in various roles as instructional designer, computer-based training (CBT) developer, project manager, and product manager since 1993. Tara joined STC in May 2000.

Hints and Tips, continued from page 7

Procedures manuals also provide "proof" of how a task should be executed, establishing a common way of getting things done.

Tip: Consistency in P&P Manuals

Consistency in policies and procedures manuals is 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.

Question: What should be included in an introduction?

The Introduction of a procedures manual typically contains the following: a statement of purpose and function (brief); the relative place and importance of the procedures in the organization's structure; a tutorial on the subject matter the procedures document; how the manual is organized, formatted and intended to be used; and whom to contact if the reader has questions about the manual. For updating purposes it is often easier to use a person's title rather than a specific person's name. Make sure that you keep the introduction brief; typically the introduction is only one and one half pages.

Tip: Updating Policy and Procedure Manuals

Some policy and procedure manuals are several hundred pages long. Updating these manuals without reissuing the entire document can present a challenge. 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 umbers 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 updates pages. And be sure that the manual uses a binding method that allows for easy insertion of new and removal of existing pages.

Question: When and How Should Placekeeping Aids be Used?

Placekeeping aids are used in procedures documentation to help the reader keep track of which steps have been performed and which steps have not yet been completed. A format for a typical placekeeping aid is the checklist. A checklist includes a box or a line is placed to the left of each step. As the user completes the step, a check mark or some other symbol in that space.

Do you have a hint or a tip you'd like to share with other members of the SIG? Send them to *Steps & Specs* Editor, 103 Blueridge Rd, Carrboro, NC 27510 or email Kathy Craddock at dizsuitsme@aol.com

Audrey Cielinski Kessler is the owner of The Write Hand, a writing, editing, desktop publising and Website design company in Kent, Ohio, a senior member of the Northeast Ohio chapter of STC, and manager of the Policy and Procedures SIG.

Member Profile, continued from page 3

perfect demand of the customer. That's when the sense of humor really helps out.

S&S: What advice would you give someone who wanted to get into P&P documentation?

SW: Look at the field again and determine if this is really, really where you want to be. How much abuse can you take? If you have a high pain threshold, find yourself a mentor who can help you get started. How to find the mentor? Network, network, network.

In job interviews, I always tell writers if you don't absolutely **love** to write, you'll hate this job in a few months. If you can deal with all the problems of uncooperative or generally ignorant subject matter experts, if you can deal with people who intentionally lead you down the wrong path, if you can wade through everything to find the truth about how to perform a function, have we got a job for you!

It's a lot of aggravation, but it's also very rewarding. But the rewards aren't always tangible. You and your boss may be the only ones who know what an incredible job you do.

I was at dinner with a group of friends last week when someone asked who had a job that they loved. I was the only one who raised a hand. As sick as that sounds, I love to play the games to get to the information I need. I love to follow office politics to see who my next source of information will be. I love to network.

***Sue Wolford** is a graduate of Ohio State University and currently serves as the policies and procedures manager at Chase Manhattan Mortgage Corporation in Ohio. **Sue** is a member of the Central Ohio chapter of STC, where she has served as Public Relations chair, vice president, president, and now immediate past president.*

Telegraphic Style - An Often Unknown, Yet Useful Writing Technique

by Raymond E. Urgo

During the 1980s while working in the aerospace and defense industry, I learned of and used the technique referred to as "telegraphic style" for documenting business and technical procedures. This technique was one procedure department's required standard for writing all procedures and instructions. Although I don't always use it today, I address it in my communication courses on procedures, processes and flow diagramming. Most of my participants have neither used nor known about this technique.

Telegraphic style is a technique of eliminating a word or words necessary for complete grammatical construction, but understood in the context. (Don't confuse this with merely eliminating unnecessary words.) An example is: "*if possible*" for "*if it is possible*." Typically the articles "*a*", "*an*" and "*the*" are frequently eliminated from the grammatical construction.

The formal or grammatical word for telegraphic style is "*ellipsis*" or "*elliptical*" style. The name "*telegraphic*" is more commonly used because it resembles the construction and sound of the wording typically found in a telegram. Most telegrams have somewhat cryptic worded messages because of the need to save the expense of being charged by the number of words in a message.

Telegraphic style can be used in any phrase or sentence construction. If used, I generally recommend the technique be applied for writing procedures or instructions only--not policies, standards or concepts. (I define procedures and instructions as a series of step-by-step statements written in the second person, telling someone how to do something to perform a specified outcome.) Further, if telegraphic style is used, it should be applied consistently throughout a procedure or instruction as long as it does not compromise the reader's interpretation of the message.

Telegraphic style has its advantages and disadvantages. One advantage is that it may produce a speech pattern referred to as staccato. A staccato effect has abrupt, distinct elements or sounds which may give the reader a certain rhythmic momentum to read to. A definite advantage is saved space, especially in procedure tables, lists, and flowcharts. (Saving space should not be a primary reason for using it.) A disadvantage is that at times it may cause some reader misinterpretations of the intended message. Also, some readers may find it too cryptic.

I welcome readers' insights, knowledge or experience on the history, application, or value of telegraphic style.

The following table compares regular and telegraphic styles applied to the first six steps in a procedure for processing a leasing application.

Step	Regular (Nontelegraphic Style)	Telegraphic Style
1	Receive the application, and verify it for the required information and the appropriate fee.	Receive and verify application for required information and appropriate fee.
2	Forward the application and the fee to the corporate office for review and further processing.	Forward application and fee to corporate for review and processing.
3	Order a credit-check report within 24 hours of receipt of the application.	Order credit-check report within 24 hours of receipt of application.
4	Deposit the application fee within 24 hours (or next business day) of receiving the application.	Deposit fee within 24 hours (or next business day) of receiving application.
5	Contact the current or prior landlord to confirm knowledge and good standing of the individual.	Contact current or prior landlord to confirm knowledge and good standing of individual.
6	Upon receipt of the credit report, decide whether to accept or reject the applicant according to the property's criteria for new tenants.	Upon receipt of credit report, decide whether to accept applicant according to property's criteria for new tenants.

Raymond E. Urgo, principal of Urgo & Associates, specializes in procedures consulting for organizations. He is the founder of STC's Policies and Procedures SIG and now serves as assistant to the president for SIGs. He can be reached at rurgo@aol.com.

Let's Talk! All You Need to Know to Subscribe, Post and Use the Policies and Procedures LISTSERV to Your Advantage

Source: Audrey Cielinski Kessler

The Policies & Procedures SIG LISTSERV debuted in 1998 as another way for SIG members to pose questions and problems to the SIG community and exchange ideas related to, what else, policies and procedures communication. There are approximately 130 active subscribers and there's always room for more. The topics that have appeared range from writing and editing to training, management concerns, software recommendations and evaluations, and formatting policies and procedures documentation. Let's not stop with these! Topics are endless. A reminder though, topics should pertain to some aspect of policies and procedures.

Follow the instructions below to subscribe and post messages and then, let's talk!

To Subscribe:

Option 1:

Send an e-mail to subscribe-stcppsig-l@lists.stc.org [note that the character before the "@" is a lowercase letter "L"—not the number one]

Option 2:

1. Send an e-mail to lyris@lists.stc.org
2. In the body of the e-mail, type the following: subscribe stcppsig-l <your name> [note that the arrowhead brackets are not part of your entry and that the character after the hyphen in the list name is a lowercase letter "L"—not the number one]

To *Un*subscribe:

Option 1:

Send an e-mail to unsubscribe-stcppsig-l@lists.stc.org [note that the character before the "@" is a lowercase letter "L"—not the number one]

Option 2:

1. Send an e-mail to lyris@lists.stc.org
2. In the body of the e-mail, type the following: unsubscribe stcppsig-l <your name> [note that the arrowhead brackets are not part of your entry and that the character hyphen in the list name is a lowercase letter "L"—not the number one]

To Post to the List:

1. Send an e-mail to stcppsig-l@lists.stc.org
2. Type a subject title.
3. In the body of the e-mail, type your message.

Hints, Tips, Questions and Answers

Source: Audrey Cielinski Kessler

Tip: Getting Reluctant SMEs to Respond

We've all heard these lines before, "I'm swamped . . . I have a million other things to do . . . I'll have it to you tomorrow . . . ." Still tomorrow comes and the information you need doesn't arrive when promised if at all.

So how do you get reluctant SMEs to give you the information you need when you need it? Threats and physical harm are neither wise nor effective in getting what you want. A better approach is one that emphasizes teamwork and cooperation. Trying a gentler approach, perhaps one that shows empathy for the expert's predicament, the equal importance of your predicament and a willingness to work with the person to minimize the inconvenience of both parties. This cooperative approach isn't a guarantee of something that will work and you may have to resort to firmer tactics to get the information you need to meet your deadlines. Cooperation is still worth a try. And who knows, if it does work you may just endear yourself to your SME for life.

Question: Why are Procedures Important?

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.

Hints and Tips, continued on page 8

Upcoming . . .

Introduction to Policies & Procedures Communication
(Web-based course)

Offered Through:
The University of California at Los Angeles Extension

Intructor:
Raymond E. Urgo

Dates:
January 25-March 22, 2000

Fee:
$550.

For a catalog or further information:
Call 310/825-4192 or visit http://www.unex.ucla.edu

HELP WANTED

Policies & Procedures SIG Newsletter Team

Steps & Specs is published quarterly and can always use extra help and suggestions. We need volunteers to solicit, and write, articles on policies and procedures topics and write reviews of newly published books about policies and procedures documentation. We also need help in the following areas:

> production, layout and design
> researching useful Websites
> contributing hints and tips

If you are interested in being a part of this award-winning publication, contact **Kathy Craddock** at dizsuitsme@aol.com or 919/966-7904 for more information.

Policies & Procedures LISTSERV Team

The P&P SIG LISTSERV team needs someone to be responsible for archiving posts. This person would work with the LISTSERV manager to archive past posts and make them accessible to subscribers. If you have this experience, or if you've been looking for a way to get the experience and don't have a LISTSERV to work with, here's your chance. Interested? Contact **Audrey Cielinski Kessler** at audck@aol.com or 330/677-8598 for more information or to volunteer.

Policies & Procedures SIG Website

If you visit the site, http://www.stc.org/pics/ppsig/www/index.htm and and receive and error message, don't panic! The Web site is currently under revision, and suggestions for content are welcome. Contact **Luette Arrowsmith** at larrowsmith@usg.com to share your ideas or to volunteer.