Investing for the Best in Procedures Documentation

by Raymond E. Urgo

Editor’s Note: This article was written for people who oversee policies and procedures documentation rather than for those persons who write and edit such material. The information it presents, however, should be of interest to both groups.

Every business—from the local delicatessen to the multinational corporation—functions according to standard operating practices, which frequently are referred to as policies and procedures, processes or standards.

While not all companies choose to document their business or technical operating practices, they are increasingly investing in this arena. Why? Because documented policies and procedures (P&Ps) are being used in response to the increasing needs for training and other performance-improvement strategies within the organization.

Two factors driving these needs are changes in technology and changes in organizations (e.g., downsizing, reengineer-

ing, Total Quality Management, ISO 9000).

Unfortunately many companies investing in documented P&Ps are either under-, over- or misinvesting in their approaches. Many first-time efforts are so short-sighted that some industry experts see a new market for P&P documentation: “re-dos.”

During 1992, for example, 47 percent of American companies failed ISO certification because of inadequate P&P documentation. The following are two key problems with procedures documentation investments:

- Top management’s lack of commitment to enforcing P&P efforts appropriately
- Organizations continued use of 17th century principles of rhetoric to communicate information in the industrial era

The challenge, then, is to communicate complex business practices effectively but in simplistic ways suitable for the information era. Consider the following six pointers for getting the most from your investment in procedures documentation.

Implement a P&P Development Process. To successfully launch and maintain a P&P effort, your organization must have a P&P development process in place. Too often, organizations invest in initial development without concern for future maintenance. Information not maintained loses integrity, and employees avoid using it (for good reason).

The P&P development process should identify the roles and responsibilities for initiating, owning, communicating, revising and approving procedures as practices and documentation.

Maximize P&P Talents. Be sure your P&P talent is working with the latest methods, techniques and tools. The role of your P&P talent should not be that of scribes passively writing what others say happens. Instead the role should be that of information architect and information developer.

Allow your talent to “learn the business” by being part of work improvement efforts. A growing trend is to consolidate P&P efforts with training. Done properly, companies can save time and money with reference-based training.

Document for Online Communication Media. Even if your organization has no plans

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Focus on the Purpose of P&Ps. The primary purpose of documented P&Ps is to provide the curriculum for organizational training and future consistent reference for users. By focusing effectively, procedures communication will significantly improve performance for the individual and the organization.

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.

STEPs & Specs is published quarterly by the Society for Technical Communication’s Policies and Procedures Professional Interest Committee.

Editor:
Audrey Cielinski Kessler

P & P PIC Team Leaders:
Raymond E. Urgo, PIC Manager
213/876-2186 (office)
213/876-2086 (fax)
rurgo@aol.com (E-mail)

Audrey Cielinski Kessler, Newsletter
216/677-1168 (home)
216/677-8598 (office)
216/677-8598 (fax)
AudCK@aol.com (E-mail)

Nancy Ford Demeter, Pub. Relations
517/789-9007 (home)
517/788-3550 (office)
517/788-6594 (fax)
nfdemeter@aol.com (E-mail)

Jerry A. Laing, Membership
818/444-5529 (home)
818/454-1010 (office)

Diane Whitmer, Programs & Projects
816/537-5922 (home)
816/482-5292 (office)
816/672-2025 (fax)

Send contributions to:
Audrey Cielinski Kessler, Newsletter
2013 Brookview Drive
Kent, OH 44240-4204

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to communicate its procedures online, now may be the perfect time to begin. Why? First, research shows that what we have learned about communicating effectively online can be applied to paper-based documents while making the latter even more useful to readers.

Second, your organization eventually may want to communicate online and will need to prepare its information for the transition.

Many organizations simply “dump” their procedures documentation (which had been developed exclusively for hardcopy purposes) into an online system and then announce that they have online communication. But they are wrong. What they have is hardcopy communication that is only stored and accessible online. The information was not designed for the new media nor for such technological features as hypertext.

Which allows for interactive reading.

Use Structured and Analytical Writing Approaches. A structured writing approach develops information into modular units. It allows more than one person simultaneously to develop a document, which accelerates the development process, and allows users to access the information faster. With an analytical writing approach, writers replace prose-based information with lists, tables, scripts and flow diagrams to preinterpret information for the user. Preinterpreted information reduces the amount of reading, increases comprehension and reduces the chance of user errors.

Document the User’s Job. Document information to be task oriented according to business processes. By comparison, traditional approaches are subject oriented according to business functions, leaving users to assemble information on how to perform their job.

Member Profile: David K. Farkas

by Bonnie Zepka

Where are policies and procedures documents headed in the future? Online, says David K. Farkas, associate professor in the University of Washington's Department of Technical Communication College of Engineering.

Farkas bases his prediction on the fast-changing nature of P&P documents. Policies and procedures change so fast, Farkas notes, that keeping them current in hardcopy form is almost impossible. He adds that it’s not uncommon for the information to be outdated before the pages come back from the printer. Online information, by contrast, can be updated and retrieved easily to reflect the latest content changes.

Going online offers other benefits as well, says Farkas. These include “superior” user access to information, elimination of printing costs, easy distribution over computer networks, more design options than with printed documents and a greater sense of fulfillment for writers.

“What is impossible in print,” Farkas noted, “can be done electronically. In my experience, few writers who have become comfortable writing online in

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PIC Public Relations Team Gets New Leader

Nancy Ford Demeter was named by P&P PIC Manager Raymond E. Urgo as the PIC’s new Public Relations team leader.

Nancy is director of administrative and technical services for Commonwealth Cultural Resources Group, a cultural resources management firm in Jackson, Michigan. She also is a supplemental instructor at Jackson Community College, where she teaches business communications and technical writing.

One of her first tasks as team leader will be to create and produce an informational brochure for distribution in May at the STC conference in Seattle. Next will be the development of long-range plans for the team.

If you have any suggestions for P&P PIC public relations activities, you can reach her by phone at 517/788-3550 (office) or E-mail her at nfde-meter@aol.com.

P&P Moderators Needed for STC Conference

If you are interested in moderating a discussion on policies and procedures or the P&P PIC at the STC conference luncheons in Seattle, Washington, this year, contact Diane Whitmer at 816/482-5292.

PIC Mid–FY 1995-1996 Budget and Expenses Summarized

The financial health of the P&P PIC for mid–fiscal year 1995-1996 has been diagnosed as “good.” Revenue of $1,850 and expenses of $757 yielded a balance of $1,092.

Member Seeks Info on Teaching and Use of Online P&Ps

Member Gail Lippincott is looking for information from other PIC members about online P&Ps for an undergraduate course, “Procedures and Policy Manuals,” she will be teaching at the University of Minnesota as a teaching assistant. Gail also is interested in talking with members who have taught P&P courses. If you can help, call Gail at 612/624-9729.

P&P Sessions Slated for STC Conference

Five P&P sessions are scheduled for during the STC conference in Seattle, Washington; the last item listed is a postconference session:

- Developing Internal Procedures Online (Monday)
- Networking luncheons (Monday and Tuesday)
- Video: A New Approach to Writing Procedures (Monday)
- P&P PIC meeting (Wednesday)
- Topics in P&Ps (Wednesday)
- Flowcharting Performance-Based Processes and Procedures (Thursday)

Publication of Member Survey Results Delayed

Fifty percent of the PIC’s members have returned the membership survey forms mailed to them several months ago. Because of a delay in publishing the directory, you still can return your completed form.

If you did not receive one or need a new one, send a self-addressed stamped envelope to Jerry Laing at 11244 LaRosa Drive, Arcadia, California 91006-5928. Deadline for the receipt of survey forms has not been set.
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.

Bonnie Zepka is a freelance writer in Louisville, Kentucky, and a member of the Kentucky chapter of STC.