

# Procedures manuals: Let's look at good v. bad

Never before has it been more important to have your procedures accessible by the staff. But how do you know your standard operating procedures manual, while being perfectly clear to you, is also clear to everyone else who might need to consult it—including people who don't have your experience, institutional knowledge or understanding of key details?

Let's look at some good examples of SOP manual techniques ... and some bad ones.

## **BAD subject headers**

*Mail*

*Copier*

*Archiving*

*Minutes*

*Reports*

## **GOOD subject headers**

*How to Process Outgoing Mail*

*Using and Fixing the Copier*

*Archiving Documents on the Network*

*Taking Meeting Minutes*

*Steps to Prepare End-of-Quarter Reports*

Get specific where you can about exactly what the manual user is looking for. Words like "mail" or "reports" can mean too many things.

## **BAD process description**

*Put all marketing files on the F: drive when they're done. The folder in there is called Price Grid. There's a subfolder for every year and type. First make sure to name it after whatever the project is.*

## **GOOD process description**

*To archive completed files:*

*Give each a name signifying which project they belong to.*

*Move the file to F:\Marketing\Price Grid.*

*Within this archive, select the proper project year.*

Move sequentially through your process, and when describing its steps, always use bullet points and subdivisions to “stack” them. It’s easier to see the logic this way, and easier to remember.

Use bold or italicized type for emphasis and to highlight more important parts of the process.

**BAD instruction**

*Outgoing mail has to be in the bin by 4:00. If not, it has to be taken to Mr. Wallace. Make sure nothing is creased.*

**GOOD instruction**

*Outgoing mail has to be in the bin by the time the USPS carrier arrives, at 4:00. If this deadline is missed, it has to be taken to the mailroom supervisor (Mr. Wallace as of March 2018). Make sure nothing is creased, as creased letters will jam the sorter and cause delays.*

What we’ve done here is put context into the users’ minds. Now they understand why there’s a 4:00 deadline, and what the ramifications of creased letters are. It’s also explained what Mr. Wallace’s significance is, so if he should leave, it’s understood that the person to see is the next mailroom supervisor, not just anyone.

**BAD wording**

*Using the old system to merge spreadsheets will not work if the data hasn’t been reformatted. Use the new system instead.*

**GOOD wording**

*Using the old system (retired as of May 2017) to merge spreadsheets will not work if the data hasn’t been reformatted. Use the new system (effective October 2018) instead.*

The words “old” and “new” have no meaning in a fluid document like a standard operating procedures manual. Use real dates and times to put everything into its proper time frame and assure the reader that they have the best information available.

### **BAD introduction**

*To put the annual brochure together, ask Sharon what you'll need. She will provide you with all the materials.*

### **GOOD introduction**

*To put the annual brochure together, you will need:*

*A schedule and project file as provided by the project manager.*

*Access to the file "Marketing Brochures" on the D: drive.*

*The physical photo file stored in the Marketing cabinet.*

*As of June 2019, Sharon Burling is a good resource for any problems you might encounter.*

Every procedure should be written as if no one is available to assist; the manual itself needs to do the heavy lifting! List and describe all resources and materials that will be used.

Feel free to "name-drop" employees if they can help, but make sure to alert the manual user as to how recent your observation about their availability and usefulness is.

### **BAD reasoning**

*Accounting doesn't want the admin team contacting legacy clients, even for address confirmations. If you need to do so, submit a request to Accounting via email.*

### **GOOD reasoning**

*As of September 2018, Accounting doesn't want the admin team contacting legacy clients because of the confusion it causes as to who their best information source is. If you need to do so, submit a request to Accounting via email.*

What the second example does is reaffirm the reasoning behind a procedure. Every time we learn a new procedure, we instinctively consider shortcuts. Make sure people understand the logic behind a seemingly illogical procedure so they aren't tempted to work around it and cause a problem. Why wouldn't an admin be able to simply ask for an address? Well, here's it's explained why.

**The common theme around all the above tips is the avoidance of assumption.** Is your binder really helping someone do the job, or just giving them a slight push and hoping for the best?