

## **Suggested Approach to Produce Office Procedures**

Produced by Brendan T with reference to Internet Articles in Bibliography – June 2014

### **Definitions**

First of all a few short definitions so that we all understand terms..

The situation is a person that is driving to a new location. In this situation the person goes through the system of driving, but in order to successfully complete the task of reaching the destination they need a policy, process and procedure.

The policy is the list of rules or the framework for the task. In the case of driving the policy is the rules and regulations for driving.

The process is the outline of how to get to the destination. Imagine the map showing the driver where they are starting and where they are ending.

Finally, the procedure is the list of exact instructions for every turn the driver needs to take to arrive at the destination.

### **Benefits**

From time to time, workers may need to refresh their memories on how to perform certain tasks. Likewise, new employees to an organization will want to learn the ropes as quickly as possible without having to keep interrupting team leaders or co-workers with countless questions

The main benefits of Online Office Procedures:-

1. More easily updated - Policy and procedure manuals that do exist are not always up-to-date and users cannot always find the documents they need to make informed decisions. An up-to-date, on-line system will permit those who use or are directly affected by policies and procedures to have the access they need.
2. Responsiveness - The ability to quickly update and disseminate procedures would enable a company to adapt to changing work practice due to technological advancement or new customer requirements and also to changing business needs.
3. Accountability - Clearly written, available procedures are one of the foundation elements of any system in where individuals and units are held accountable for adherence to company policies and procedures.
4. Accessibility – Online procedures system would be accessible by all relevant parties to which the procedure applied so they could have input into ensuring the procedure was kept up-to-date and reflected best practice.
5. Adaptability – If there is a high-turnover of staff then new recruits could quickly become familiar with the main tasks to be carried out by their role and be able to be productive quite quickly with the minimum of training by team leader.

## Approach

1. A starting point for identifying required procedures is to refer to the job responsibilities of each administrative position and select the main tasks of the role which meet some of the following criteria :-
  - Is lengthy (example: year-end inventory).
  - Is complex (example: benefits administration).
  - Is routine, but it's essential that everyone strictly follows rules (example: payroll).
  - Demands consistency (example: handling a refund request).
  - Involves documentation (example: disciplining a staff member).
  - Involves significant change (example: installing a new computer system).
  - Has a serious consequence if done wrong (example: safety guidelines).
2. There may also be many tasks which typically get done without written procedures. These unwritten ways of carrying out work is possibly passed on by team leaders to staff members in an informal way but could benefit from being put in a procedure. This would also ensure that these informal ways of working are always carried out in a consistent manner by different staff members.
3. Perhaps a good place to start might be less critical area like Administration roles for tasks which fit the above criteria. By doing this, the method of producing procedures can be developed and improved so that other more business critical areas like I.T Support could be tackled later.
4. Once some of the main tasks carried out by selected roles have been identified then the following Procedure Tracking Spreadsheet could be built up for each role so that we know the overall position. This could become an index in an online system where each entry is a hyperlink to the procedure.

	Daily	Weekly	Monthly	Quarterly	Yearly
<b>Administrative Assistant Job Responsibilities</b>					
<b>General Administrative</b>					
Phone management and call routing	Yes				
Calendar Management	Yes				
Filing, record keeping		Yes			
Liaison between VPs, Dept Heads, and public/private officials	Yes				
Correspondence - Letters, Memos, E-mails	Yes				
Check Requests, Expense Reports		Yes			
Equipment requests					
Maintain Dept. Manuals / Processes & Procedures					
Serve as resource person to other depts and staff regarding department procedures					
Office Supplies - Ordering and storage					
Proofing/Editing Documents					
Mail Sorting, Distribution					
Maintain department records / phone lists / contact lists, etc.					
Promotional Material - Ordering and storage					
Website updates (intranet, Internet)					
Organizational Charts					
Payroll processing					
Special Projects					
<b>Meeting / Travel / Event Planning</b>					
Travel Planning - Air, Car, Hotel, Entertainment					

5. At this stage, most of the important tasks that need to be made into a procedure are identified. It is now necessary to decide whether I would write all of the content myself or assign the first draft to individuals who are well versed in the subject matter. Perhaps this can be decided as the project progresses and we take into account the level of knowledge of experienced staff have about how tasks are done in their particular area.
  
6. Assuming I would produce some of content – I would start to gather the information by sitting with long-time staff member while they go about performing the task. I would also meet with other content experts as well as people who hold key information i.e stakeholders, technical staff, and people who will use the procedure. As the procedure writer, I would try and obtain a clear understanding of what's going on in as much detail as possible. I would then cut down the information to what the end-user really needs to best understand the process by producing a mind-map.
  
7. Once info gathered for procedure, I would then sit-down at computer and write out the steps in a simple template like the one below.

PROCEDURE NAME:	
ROLES PERFORMED BY:	
CATEGORY:	
DESCRIPTION:	
CREATED BY:	
DATE:	
OTHER NOTES:	

To keep procedures succinct and easy to use, I would adhere to some of the following tips :-

- Use a template to stay on track and consistent from process to process (as above)
- Go through each task or process step by step (in detail).
- Be specific without being excessively wordy.
- Use command like structure and not verbose sentences.
- Use bullets or numbers as much as possible. Number steps that must be done in a specific order. Use other bullets for non-order specific instructions.
- Provide screen shots where helpful for computer-related tasks with arrows and text boxes (see sample below)
- Have another person try to do the task based only on your instructions. See where any potential gaps exist.

I would use diagramming techniques like Flowcharts and Swim Lane Diagrams and also use Play Scripts to improve the procedure readability.

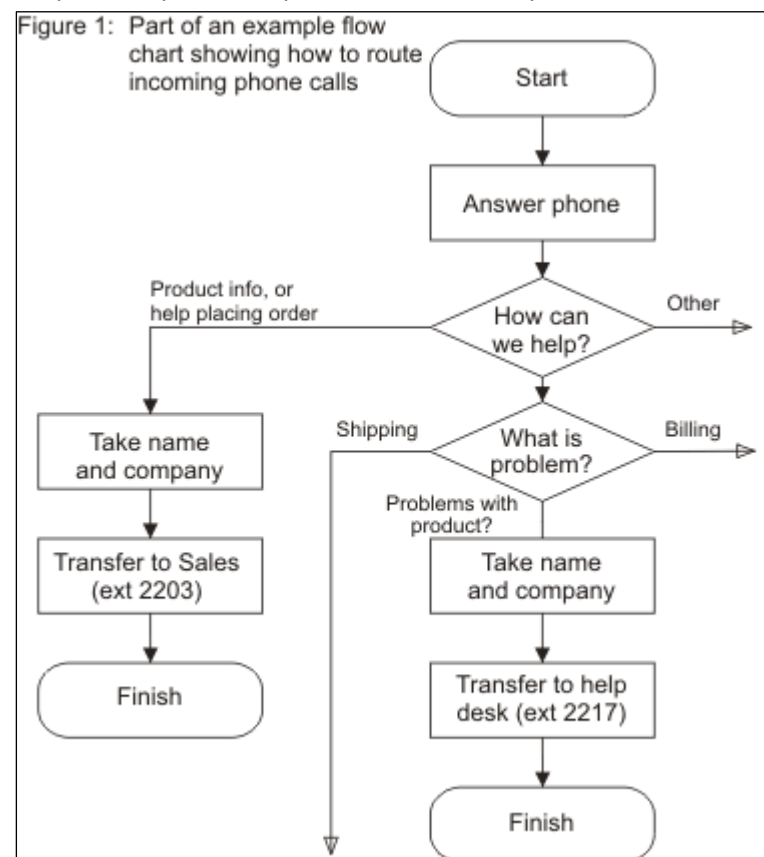


Figure 2: Sample Swim Lane Diagrams where more than one department is involved

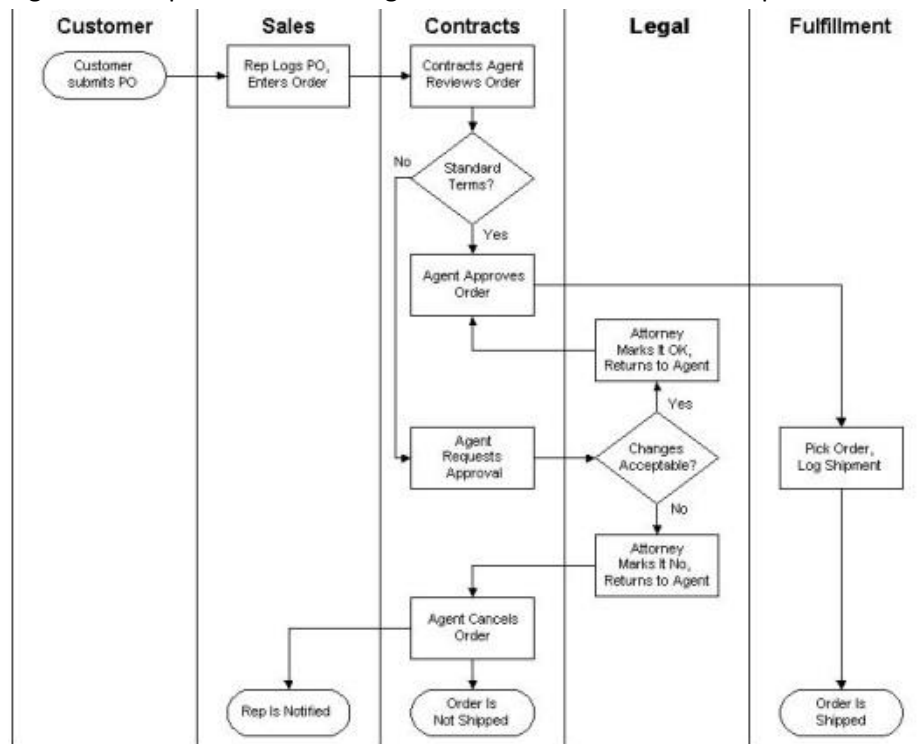


Figure 3: Play Script – may be used where a few people responsible for carrying out task within a process

Person responsible	Action
Writer	Gather information. Write procedure. Show draft to stakeholders.
Stakeholders	Review draft. Submit corrections and comments.
Writer	Create final draft.
Department manager	Approve final version.

8. As the first draft of procedures are completed, I would upload them into a Cloud Based system like Google Apps and provide access to all relevant parties for which the procedure applies. They could then review the procedure and add comments to it and once returned to me, I would then apply changes as necessary to create a first version.

## Document Management System Options

I think in the early stages of developing an Online Procedures System that in order to get it up and running that a simple system is put in place to manage it. So, on one hand we need to allow the procedures to be shared and collaborated on, while on the other we need to control who has access to them and keep track of different versions.

Traditional methods of managing files in a hierarchical directory structure on a network is cumbersome with no viewable history of who has edited which document and limited ways of restricting access. There is also no way of seeing all the changes made to all Procedures on a weekly basis made by their team which would allow a person pick up on the changes relevant to their work.

So here are a few options to consider...

- **Google Docs** - Google Docs is like Microsoft Word and Excel with the exception that it is free and entirely online. The main advantage of this is that it shares changes in real time and you can set permissions of who can read or edit it.

Google Apps standard edition, which includes Google Docs, is free and has a limit of 50 users. It includes email, calendaring, documents, and comes with 7 GB of space per user, which is fairly generous. However, the free version does not come with support or any sort of uptime guarantee so you are basically on your own when it comes to configuration and usage.

I looked into other version that might suit Jobcare like the non-profit versions and Google Apps for Education. The non-profit version is not available in Ireland yet but perhaps Jobcare would qualify for Google Apps for Education as you have a training division.

- **Wiki Software** – A “Wiki” is a website that allows easy creation and editing of any number of interlinked pages using a simple markup language. Wikipedia.com is one such website that uses Wiki software. Wikipedia runs on [Mediawiki](#) but that is probably overkill for a policies and procedures setup.

[Dokuwiki](#) is a simple Wiki aimed at small companies for creating documentation of any kind. It also stores its data in plain text files so you do not need a database. Dokuwiki supports permission based sections so you could give I.T Support access to the technician section, but not to the marketing section and vice versa.

- **CMS Development** - A CMS is basically a Website where the content is updatable with an easy to use backend system and can be changed quickly by non-techie people. The updated content and associated web pages can easily be uploaded to an internal company server and becomes available instantly. One of the most popular and open-source CMS is Wordpress which is well established and has many themes and plugins available for it. When considering this option, the development of the CMS would need to be done by a Web Developer to get it up and running and thereafter the content could be maintained by those who use it.

- With Cloud based computing becoming popular, one Web App that caught my attention is [www.sweetprocess.com](http://www.sweetprocess.com) . I did notice that there is no provision made for including diagrams which I thought was surprising as diagrams give a visual understanding of a process which helps someone grasp it at a higher-level before looking at procedure.

## Bibliography

Ref No	Internet Link
1	<a href="http://www.sweetprocess.com/what-are-the-differences-between-a-policy-a-process-and-a-procedure-why-knowing-this-is-the-key-to-scaling-and-automating-your-business/">http://www.sweetprocess.com/what-are-the-differences-between-a-policy-a-process-and-a-procedure-why-knowing-this-is-the-key-to-scaling-and-automating-your-business/</a>
2	<a href="http://mhcea.com/wp-content/uploads/2013/05/HANDOUT-AdministrativeProcedures-FINAL.pdf">http://mhcea.com/wp-content/uploads/2013/05/HANDOUT-AdministrativeProcedures-FINAL.pdf</a>
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