



## How to Write Procedures

### Why Write Procedures?

Procedures play an important role in any company as they are an outline of business processes by which employees learn and by which management makes decisions. Well thought out procedures reduce confusion, increase consistency and eliminate mistakes by detailing how work is to be done and what is expected of employees (and Management). They also help capture key business knowledge (that may solely exist in each employee's head) and create a back up for key positions/processes.

### What is a Procedure?

A procedure is a step by step set of instructions for performing a specific task. The task can be physical, such as installing a security system, or mental, such as calculating the profit margin on a product or service.

Procedures tell users "how":

- How to do a task, such as creating an invoice.
- How various parts of a task relate to one another, such as how a loan application passes through a bank.
- How a task was done. Users can then verify what happened. For example, a market researcher can review the procedures another researcher used to determine if the analysis was valid.
- How a task will be done. Users can then use this to create a project plan and timeline.

### How to Write a Good Procedure

#### Preparation:

Step 1: Provide a purpose statement. State the goal of the procedure as clearly as possible. For example: This procedure tells you how to set up a new user in the accounting system.

Step 2: Provide an overview of the procedure and an estimate of the time needed to complete the procedure.

Step 3: Identify any prerequisite knowledge and skills needed.

Step 4: Highlight any safety issues or other precautions.

Step 5: Add a list of equipment, supplies or parts needed for the procedure.

#### Writing:

Step 6: Writing the procedure.

- Limit each step in a procedure to one task. Then present the steps of the procedure. Begin each step with a number. The number tells employees the sequence for performing the steps.
- People can only handle a limited amount of information at any given time, so limit the length to about ten steps. If your procedure has more steps, break them into a "mini-procedure" within the larger procedure. When writing it, indent the mini-procedure within the step of the main procedure. To differentiate the steps of the mini-procedure from those of the main procedure, begin each step of the mini-procedure with a letter instead of a number.
- Begin each task with an action verb that tells employees what to do. For example: Subtract expenses from revenues. Keep the language simple. Define unfamiliar terms or company specific jargon.

Step 7: Include tips and help hints. Provide anticipated problems and how to address them.

Step 8: Add diagrams, models or anything that may aid understanding of the process.

#### Follow up:

Step 9: Test pilot your procedure. Is it understandable and complete? Does it result in repeatable, efficient and effective performance?

Step 10: Inform the employee of any performance standards to be met when the procedure is undertaken.

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