

## Documenting Business Operating Procedures

*By Ann N. Gatty, Ph.D.*

Writing your business procedures is probably the least glamorous part of the business, but it may be one of the most essential. Having a written document that outlines, step-by-step, how you do stuff can save your business time, money, and add value to your bottom line. Committing a process to writing can solve a multitude of challenges. Any process has key steps that cannot be forgotten, and these steps usually have to be completed in a specific sequence. Following the process, using the same step-by-step approach also provides consistency in the results and as the company grows, some of these processes can be outsourced more easily if the process is documented and people can simply follow the directions.

However, sometimes there can be problems if the procedure instructions are poorly written. Staff can get frustrated, time can be consumed, and money can be wasted. Leah Guren, of Cow TC, has developed the Jigsaw Puzzle Theory to describe the three most common causes for procedure failure. These problems are analogous to trying to complete a jigsaw puzzle.

- **No picture on the box.** There is no clear explanation of the purpose or motivation for the task.
- **Missing pieces.** Information, often entire steps, is left out.
- **Extra pieces.** Information that is unnecessary to the task confuses and distracts the user

How do you avoid the Jigsaw Puzzle problems while improving business operations? First and foremost, get someone who is a proficient writer to be responsible for creating the document. Communicate the importance of creating operating documents so that the assignments are taken seriously. Each business operating procedure should have its own documented best practice. People writing operating documents should consider the following tips.

### *Analyze the Use*

This is the first step for creating task-based documentation. Who will be using these instructions? What is their technical knowledge? Where and how are they using these instructions? What is their basic understanding about the tasks that you are describing?

### *Focus on the Tasks*

What is the step by step sequence of tasks that are included in this process? Are there different ways of performing these tasks? Which are the preferred ways of completing the tasks? Always look for methods that would allow steps to be completed either more timely or effectively.

### *Keep it simple:*

The information should be written in clear, simple language. Use clear formatting cues, such as numbers or bullets and avoid lengthy blocks of text. Avoid using words that have more than one meaning and can be confusing. Readers will tend to skim and may miss critical details. Have a person unfamiliar with the procedure try to follow the directions. This will help you clarify where the person finds confusion or completes the procedure incorrectly.

### *Explain the purpose*

Some procedures are obvious, but some require explanations so that the reader understands the importance of a step or steps. Streamline processes by reducing any non-value added tasks and verify that each of the steps has a purpose in completing the process.

### *Layer the Information.*

The procedures can be written in a very simple straightforward manner, but for those who are just learning the procedure, add extra information in a layered format, which could be less visually prominent text that is positioned under the main step. Don't assume a certain level of knowledge. Prepare for people with varying understanding.

### *Add graphics*

Infographics are very helpful for those who learn better with images. The orientation becomes more clear when the reader can see what a procedure looks like. Graphics with directional arrows, or highlighted characteristics can be easier to understand than paragraphs of text.

### *Update regularly*

Things change and operating procedures are no different. Also, people may find more efficient ways of completing a process. As technology changes, review the procedures that are affected. As new steps are included, sift out the outdated tasks that are no longer necessary. Look for more innovative ways to accomplish the business goals with your procedures and, over time some of these operating processes may be automated.

## *About the author:*

**Dr. Ann Gatty** is a partner at Drs. Gatty, LLC, a business consulting firm, helping businesses add value-assets to their businesses. For the past twenty years she and her husband, Gene, have been providing business leadership mentoring and solving HR employment issues. Ann has recently created **The Business Sphere of Excellence**<sup>®</sup> a strategic business planning model used to construct annual and long range business plans helping businesses run more efficiently and profitably.

Dr. Gatty is an expert in understanding and improving the workplace culture which is foundational for implementing any successful strategic initiatives. In order to better explain the importance of employee engagement, Ann partners with Beretta, her Great Dane therapy dog to present her key findings.

For more information about leadership mentoring or building a business to work brilliantly, visit [www.strategicpeoplesolutions.com](http://www.strategicpeoplesolutions.com).