



7 Proven Tips For Bringing Your Policy And Procedure Communication Into The 21st Century

Organizations that integrate clear P&Ps into everyday life realize improved quality, reduced training / turnover costs, and a more empowered workforce. (*Results like: 75% error reduction, 50% reduction in employee onboarding time are NOT uncommon*)

So, the *potential* value is there, but there's strong evidence that most organizations never achieve it, especially when **many employees readily admit that they don't trust or read "the official P&P manual"**.

This is extremely disheartening considering it probably took (*insert very large number here*) days or months to create "the official manual".

Even with all the available tools and technologies, far too many organizations continue to give employees manuals and SOPs that only further confuse and frustrate them.

21st century P&P communication is not just about a more modern presentation, but it's also about implementing a **smarter content strategy.**

Giving employees access to Policies and Procedures that use all the latest technology bells and whistles will NOT fix underlying content problems. Bringing your P&P communication into the 21st century redesign is an opportunity to fix your content and underlying strategy. Smart companies will seize this opportunity to do what they should have done years ago: clean up their content.

Part 1: 21st Century Content Strategy Tips

#1. Focus on the desired outcome (warning: may require mindset change)

People often get so consumed with the “work aspects” of writing up P&Ps, they lose sight of WHY they are developing them in the first place. Everyone is told “let’s get this DONE so we can get back to our “real” work”. So, the real value is never communicated to the team, let alone management! This mindset is common in situations where there is no link to economic value.

P&Ps that aren’t furthering performance and profit goals are so last century.

Just shifting your thinking about policies and procedures can mean the difference between having an effective “system” for continuous improvement and hundreds of pages of documents that no one wants to read. Instead of documents, create a “good Policy and Procedure knowledge system” that is **purposely designed** to improve performance, products, and service.

What is the performance outcome you want? What operational problem will this solve? Everything you do from here should serve this end goal. At the end of the day someone ought to be able to use the system to achieve the desired outcome -- without asking for help.

If you follow this approach, you will naturally create content gives your audience what they need and the way they want it.

If your organization has NOT achieved the desired outcome, then your P&P system needs work. Continue improving it until the desired outcome is achieved.

Example: When CompanyA took on a new product line, their Operations Manager was getting called with questions about every order. Orders were delayed. Everyone was frustrated. Solution: create order processing policies and procedures designed so that everyone involved could handle their part without having to ask each other for help or call the Manager. Another goal was to enable a staff member to cover for another staff member if they were out sick. Desired Outcomes: Freed up time, fewer billing errors, 75% reduction in order processing time.

#2. Divide and LINK Policies and Procedures

The strategy for your business might be outstanding—genius-level, even—but unless your employees can understand what it is and how to implement it, nothing good can come of it.

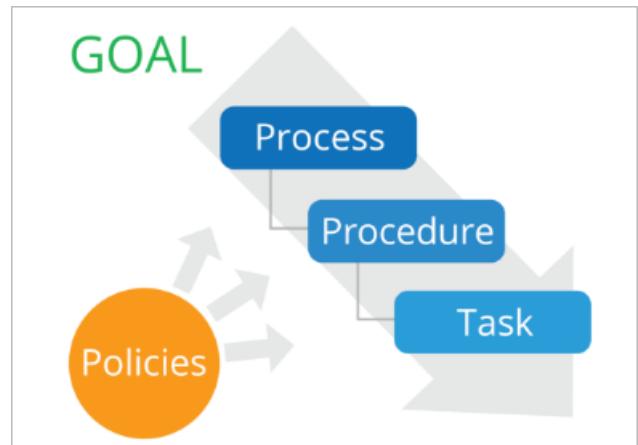
When creating 21st century P&P communication, it's important to understand how policies differ from procedures and why you need both information types. Below are common mistakes to avoid:

- **Creating Policies without corresponding Procedures.** Policies describe what you want to happen. That's a good start, but it's equivalent to saying something like: "It is our policy to be an equal opportunity employer," or "It is our policy, etc., etc." That's it. It's then up to the employees to figure out how to make that happen on their own. This is risky at best, and can often be disastrous.
- **Stand-alone procedures out of compliance with policies.** "How to" questions must get answered somehow. Operations manuals, training guides, workflows, and even Post-it notes all spring up at the corporate, department, or individual level to help employees do their work. However, when work procedures develop without being cross-checked with stated policies your organization will at best be out of sync with itself, and at worst, be noncompliant with legal, regulatory, or internal controls.
- **Everything all mixed up together.** In an effort to address the pitfalls above, many organizations intermix their "whats" and "how tos"—often creating ginormous, labyrinthine volumes of hybrid policy and procedure information. Employees have to wade through an avalanche of detail to find answers to simple questions. It's counterproductive and can lead to big penalties. When everything is all mixed up together, finding quick, clear answers to any question can be nearly impossible.

Dividing and linking is the answer

For best results, divide and conquer. Use policy documents to answer the "What do I need to know?" questions, use procedure documents to answer the "How do I do something?" questions, and then cross-link them.

The benefits of this simple organizational technique are exponential. It accommodates the way people seek answers in daily situations, leading to faster, more accurate actions and better decisions. It is also vastly easier to maintain and keep updated.



For more information on the topic of the difference between Policy and Procedure, refer to our blog topic. <http://www.compose.com/think-you-know-the-difference-between-policy-and-procedure-test-your-knowledge/>

#3 Remove / avoid content inconsistencies -- provide the right structure

Often, when an organization decides to document their policies and procedures, they assign different people to the task who then fire up MS Word or Excel and start writing. They write about this, write about that, and soon they end up with one big mess. How often we've heard the complaint: "every document is a new experience!"

Inconsistent terminology is a major cause of slow-lookup time and makes it difficult to utilize a search engine. Because of this, busy professionals spend hundreds and thousands of hours "cleaning up" inconsistent, hard to follow material.



Inconsistencies happen when there is a lack of planning and when people are using the wrong tools for the job. Many have the misconception that Word styles alone can ensure usability and standardization. In an unstructured environment, there is simply no way to ensure standardized format or consistent terminology. It's impossible to prevent authors from "doing their own thing."

The smarter, 21st century approach is to spend a little more time **at the beginning** setting the right structure and standards and AVOID all the hours and hours of cleanup and re-work later. Use a development tool that provides a pre-built structure (that can be tailored for your organization), has built-in quality controls, and provides authors with needed guidance on policy and procedure best practices.

#4 Reconcile / avoid content duplication – break content up into “modules”

This tip is closely related to tip #3. Over time, especially when many people are involved in the development process and don't have visibility to what everyone else is doing, it's easy to build up redundancies and duplication. This is especially common when policies and procedures are mixed together in the same document. **Someone in one department may spend hours writing up a procedure, unaware that someone in another area figured out a better way to do it.**

Example: One community bank we worked with sent us their policy and procedure content for review. We noticed many gaps and redundancies. One specific example: the list of their account eligibility guidelines was written several times, embedded in different documents. Every time we saw it, it was different! Errors like this result in inconsistent work practices and cause employees to distrust "the official manual."

Again, the key to avoiding this is planning upfront, and implementing a more structured, methodical content strategy. If you are doing a redesign, take inventory of all content assets. Note duplications. Make sure content is broken out into separate documents and that it's easy to get document listings and identify document relationships. Any information that is utilized or referenced by several processes should be broken out into a separate document and then LINKED to related content.

Part 2: 21st Century P&P Content Delivery



#5: Ditch the clunky manuals

Communication channels have evolved, yet, most organizations are still using formats for their policy and procedure communication that were designed for an 8.5 x 11 piece of paper.

Knowledge workers, especially younger employees, will expect a better experience than scrolling through 100-page Word documents or looking up information in an old-style manual that's probably already obsolete.

Modern organizations are moving off paper and to an online Policy and Procedure knowledge system.

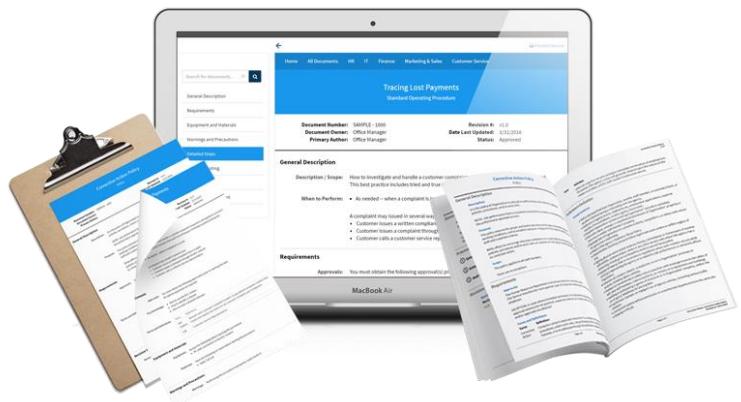
The benefits of online are many:

- Central organization
- Employees have access to everything they need 24/7, no matter where they are located.
- Updates go out to thousands of employees in seconds (no replacement pages!)
- Easier version management
- Integration with other online systems
- Faster lookup (navigation, hyperlinking, search engine)
- Easy integration of video and audio (podcasts)

Even if online is your primary distribution channel, **you may still need paper in some situations**. For example, some of your workforce may not have access to a computer or smartphone. There may be times you need to send information to a stakeholder who doesn't have access to your online system.

Your development method should be flexible enough to provide BOTH online and paper outputs, optimized for each medium WITHOUT the author having to do any re-work or re-formatting.

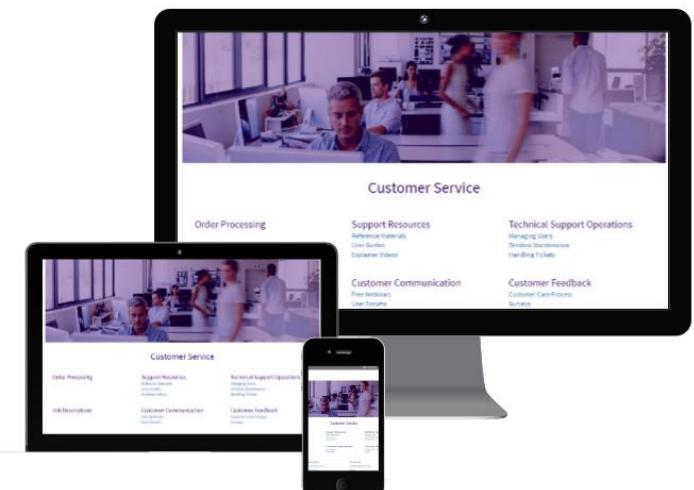
CAUTION: Simply putting Word or Excel documents online "as is" is a big mistake, frustrates users and slows them down. Most documents created by word-processors are designed for one channel only: print. Documents created with general-purpose word-processors have no internal navigation. As a result, even when a user finds the document they want, they are forced to scroll and read the entire thing to get to what they really want.



#6: Design for small screens

The world is going mobile, which means employees will be consuming information on smaller screens including smartphones. If you're still producing old-style static documents, moving into this world will require massive conversion efforts. Even if your organization isn't embracing mobile yet, why not make sure you're ready?

Your development tool or system should generate output that is “**responsive**”, meaning the output adjusts itself to fit any size screen.



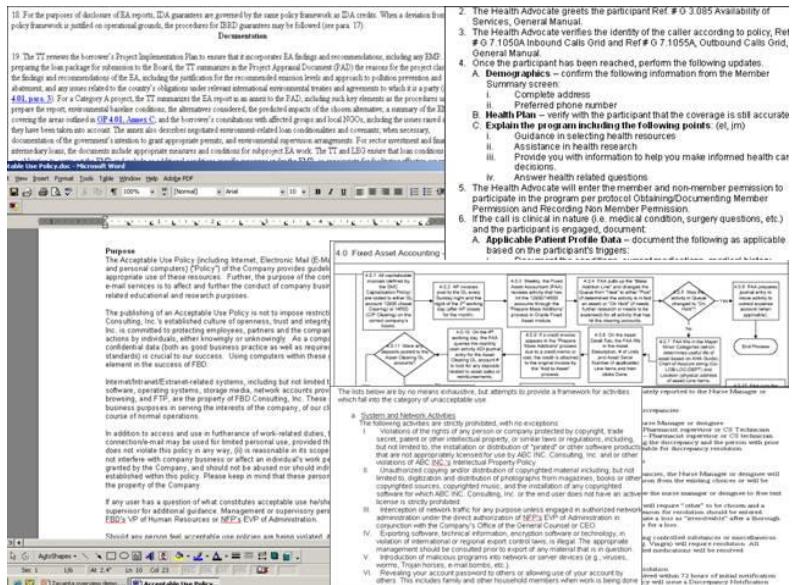
Going “responsive” will mean that some formats people are used to are going to become obsolete.

Use a development system that lets you quickly preview how your output will look like on a large monitor, tablet, and smartphone

Avoid wide formats and tables that become unreadable on small screen or that require a lot of pinching and scrolling to view them

Make sure large images automatically shrink and resize to fit the screen

Check that your site and internal document navigation changes appropriately to fit the screen size. (Navigation methods that work on large monitors may not translate well on small screens.)



#7: Give employees access to EVERYTHING they need



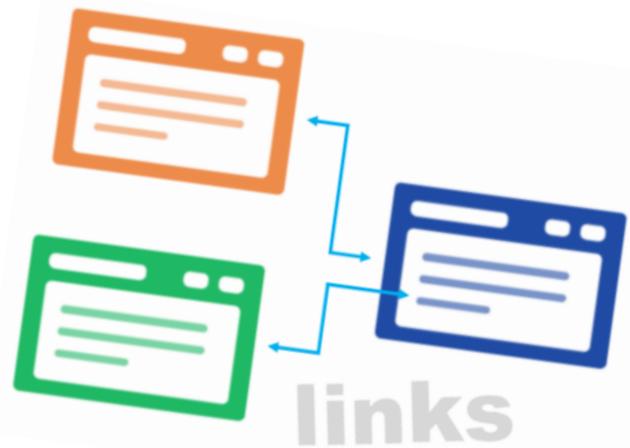
This is where it's time to think beyond the traditional P&P documents. Clear Policy and Procedure content is the foundation of your system, but don't stop there.

What additional information might employees need to achieve the desired outcome?

Your knowledge system may include: high level Processes, FAQs, Job Descriptions, Lists and maybe a Company Dictionary! Why not include contact links to the "resident expert" on a topic so that employees can quickly contact them?

In the online, web world there are no limits to knowledge integration once you understand the power of **LINKING**.

- Now is the time to break those long documents into smaller, easy-to-consume modules and **LINK** them together. Let employees explore the site by clicking on the links.
- Include links to external sources, helpful references.
- Link in forms or spreadsheets at their point of use.



If your Policy and Procedure system is cloud-based, you can insert urls to a specific policy or procedure into other cloud-based systems such as an LMS, ERP, SharePoint, or an HR system.

Consider a Policy and Procedure system that supports Single Sign On so that employees can navigate between your systems with a single log in.

The possibilities for integrating knowledge from multiple sources is limited only by your imagination.

Conclusion

Today's cloud and web technologies enable organizations of all sizes to provide employees a much richer, more engaging experience without having to be a technical guru or rely on IT. And that's a really good thing. But beware of promises that the latest "shiny new object" is going to fix or help you avoid content usability problems. Implementing a 21st century approach means giving top billing to content QUALITY. Good content, that answers employees' questions quickly and empowers them trumps everything else.

About COMPROSE

Since 1987 COMPROSE has worked with hundreds of organizations helping them build P&P systems that are purposely designed to improve employee performance and get their operations under control.



Our cloud-based Zavanta software enables any size organization to capture and communicate their Processes, Policies, and Standard Operating Procedures. We are also the inventors of "Operations Mapping," a proven method for designing clear Process-Procedural-Policy knowledge systems that are mapped to business goals and desired outcomes.

If you'd like to explore strategies and tools for bringing your Process, Policy and SOP communication into the 21st century please contact us!

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