

10 rules for ***Writing Good*** ***Procedures***

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How to write good procedures

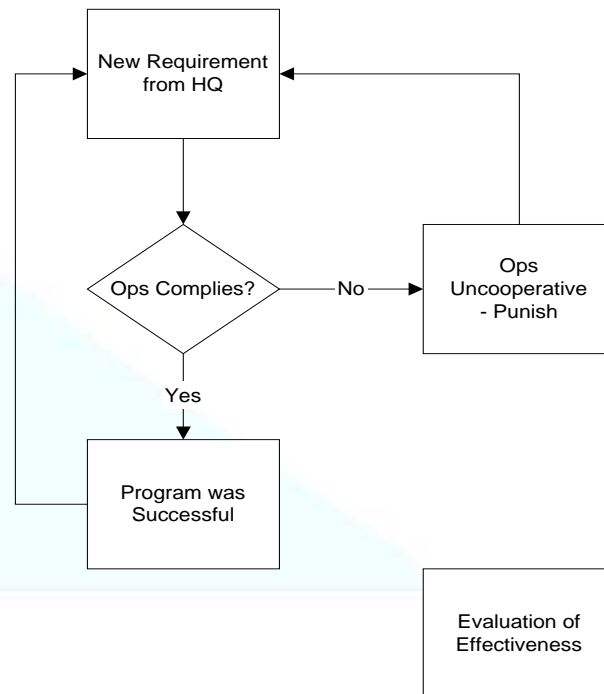
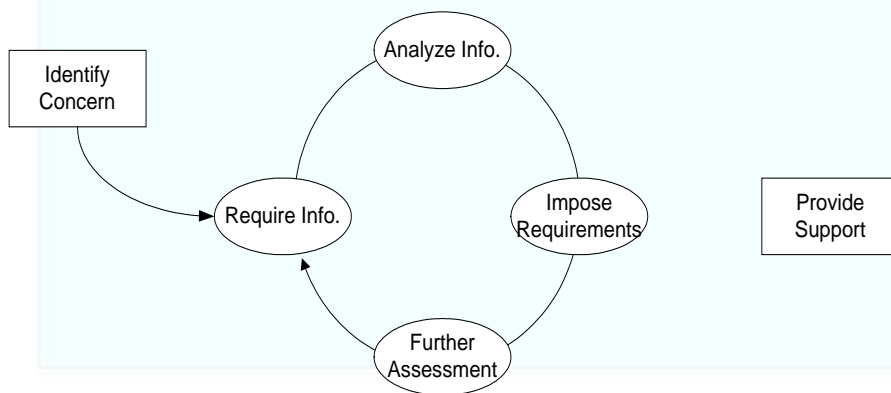
1. Get the users involved
2. Outline, Diagram & CTQs, esp. the Scope
3. Don't "should" on your procedures
4. Deductive style (start with the end)
5. No storytelling
6. Be specific (more or less)
7. Protective, But Not Legalese
8. Anticipate revision control hazards
9. Don't Misuse Misused expressions
10. K.I.S.S. (Keep It Simple St....)

Get the users involved!

- **YES, it takes longer!**
- **YES, it's harder!**
- **But, it makes procedures that work and the users will use!**

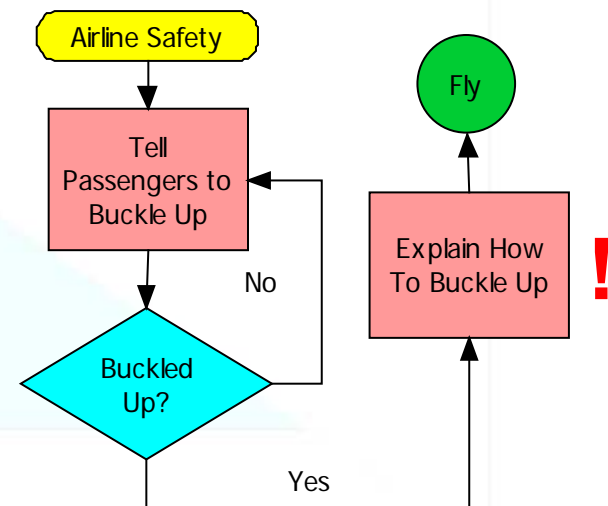
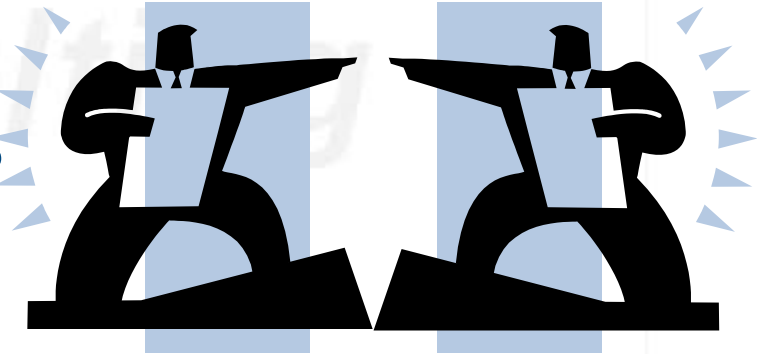
How we determine effectiveness?

The model of support Operations sees?



Outline, Diagram & CTQs, esp. the Scope:

1. Flowchart it
2. Start w/the Main Points
3. Scope:
 1. What business(es)?
 2. What personnel?
 3. What locations?
 4. What circumstances?
 5. What limitations?
 6. Exceptions
 7. Think globally



Don't "should" on your procedures.

1. "Shoulds", "mays" & "try tos" are optional – Procedures are about requirements.
2. If you feel the urge to write "should", what you're about to write probably shouldn't be in a procedure . (See "No Storytelling")
3. "Nice to dos", BMPs, etc. go in footnotes or appendices.
4. If you want it done, use "shall", "must", "will".

Use Deductive Format (the end comes 1st)

- State what you want done,
- then by whom,
- then how,
- and then lastly, if at all, why - explanatory material.
- We're not building up to a climax; we're writing a procedure (see "No Storytelling").
- Try to put the "whys" into footnotes or appendices.

It was a dark and stormy night . . . Zzzzzzz

No Storytelling



1. Frustrated novelists need not apply
2. Forget what you learned in literature class
3. Keep commentary out or put it into footnotes so the procedure stays concise. Procedures provide instruction; textbooks provide explanation
4. Leave out explanations that don't instruct the user, e.g., "It is sometimes necessary for the Acme business to...blah blah" – who cares?!
5. Leave out training material; it goes in training documents, not procedures.
6. Stick to the subject. Adding unrelated instruction is pointless. Ask, "if I were looking for this information, would I look for it in this procedure?"

Be more or less specific

- Make instructions precise. The statement that “ladders must be non-conducting” applies to all ladders, everywhere and under all circumstances, unless qualified by surrounding text.
- Be specific about required documentation, e.g., “such and such must be documented” or, even better, “such and such must be documented on this or that specific form.” (Specify the exact form & where to get it.)
- Avoid vague language, e.g., “as necessary”, “as applicable”, etc.

K.I.S.S.

- Write it. Then re-read it and take out unnecessary, extra, redundant, superfluous, not needed material.
- Take out grandiose florid esoteric obscure wording.
- Avoid jargon. If unavoidable, explain it parenthetically or in footnotes.
- But... Spell out abbreviations on 1st use, e.g., Lockout/Tagout (LOTO)
- Leave out buzzwords – unless they provide a line of sight to the customer.
- Use simple language. Consider how what you write will translate to other languages (e.g., the word “incentivise” will have to be translated back to English before it can be translated to other languages.)

Make it Operational & Protective, But Not Legalese

- We need to focus the utility of our procedures on the Operations users.
- **Operations, EHS and Legal all have the same goal of protecting the company's interests, employee safety & the environment.**

But:

- > Legal will generally find it acceptable if they have to spend a long time to find the clause they're looking for in our procedures – as long as it's in there.
- > Operations needs information “just-in-time”. We need them to focus on making, selling, supplying, servicing. Our job is to make it easy for them to be compliant, protect the employees & the community.
- **We can do both** – satisfy Legal and make it easier for Operations.
 - > Writing procedures with utility for Operations as a goal will make it easier for the lawyers and for Operations to comply – and protect the company.
 - > The other way around risks making it tougher for the folks doing the work to do it the way we need them to.

Anticipate revision control hazards

- Avoid regurgitating regulations or standards; direct your readers to the originals
- Make external references general. If some external reference changes, you may not know and if you do, you have to revise.
- Use cross-references to other procedures rather than quotes. If a quoted section changes in the source, you may not know and if you do, you have to revise your document to match.
- Avoid citing the revision of a cross-referenced document unless necessary (e.g., in contract documents).

Misused expressions & other pet peeves

- “i.e.” vs. “e.g.”
 - i.e. means “that is”. It’s specific. If you write i.e., followed by a list, you are limiting the users choices to only those items on the list.
 - e.g. means “for example”. It is not specific & limited. If you want to leave the options open, use e.g.
 - If you can’t remember, write “that is” or “for example”.
- Historic vs. historical
 - “Historic” means something that “made history”
 - “Historical” simply means it happened in the past.
 - If you want the event you’re writing about in the same class as Exxon-Valdez, use “historic”.
- Affect vs. Effect.
 - Affect is a verb; effect is a noun. When you affect a situation, you have an effect on it.
- Your vs. You're
- Its vs. It's

Get the users involved!

- They know the operations that you're trying to control better than you.
- If they don't feel ownership, they won't follow the procedures.
- We support; they make the money that pays our exorbitant salaries!
- Road test (esp. w/someone who doesn't routinely do the tasks involved)
- It's iterative.

