

BY MELANIE HODGDON

## Creating Consistency

**Even in the best companies,** turnover occurs. This can be a cause for panic (“How can we get out payroll if Lee isn’t here?”) and confusion (“Where would I find the payables report?”) when there are no identifiable processes supported by written procedures—as is often the case.

Documentation brings consistency and predictability to routine processes. Procedures are less likely to be performed erratically, and you avoid having an idiosyncratic “system” that works only for the person who developed it and might not mesh with the rest of the business. With any change in personnel, there will always be a time of transition, but with documentation, it will be a steady, controlled ramp-up for the new hire instead of a chaotic and expensive scramble. Provided with a well-written procedural manual and some oversight, a new employee should be able to produce work that is identical to that performed by his or her predecessor.

### PROCEDURAL MANUAL

The most frequently requested service I perform for clients is creating a procedural manual for office staff. There is a temptation when creating such a document to limit it to a dull list of “click here, file there.” For it to be effective, however, you need a document that explains the purpose of each process, describes how it interacts with other company procedures, and states the intended objectives of each procedure. To this end, I recommend that procedural documents include the following sections:

**1. Overview.** Under what circumstances would this procedure be followed? It is useful to include a specific

example of a situation that the company might encounter.

**2. Objectives.** What will this procedure accomplish, and why are the objectives important?

**3. Procedure.** What specific steps must be followed?

These three sections become the headings on a Word document, and as I begin fleshing them out, I write the Overview and Objectives without reference to specific software.

For example, when creating a procedural manual for QuickBooks users, I focus the Overview and Objectives on an issue, such as making job-related purchases using debit cards and what to do when returning materials for a credit to the debit card. Mention of QuickBooks comes in only in the Procedures section.

You may be tempted to assign the writing of these instructional documents to those responsible for carrying out the procedures. But keep in mind that not all workers excel at documentation. You might request that they start by making a list of the procedures that they perform routinely. Select one procedure for them to write up, and then have somebody who is *unfamiliar* with the process review it to see if it makes sense. There’s no point in having an employee produce instructions that make sense only to people who already know how to do the process being described.

Documenting routine procedures is just as important as making backups of your critical files. You will appreciate them when Lee quits—and you need to run payroll!

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