

## 9 Steps for Developing Policy/Procedure Manuals

Use the following steps to jump-start the policy/procedure manual development process:

1. **Obtain and review format and style standards for your organization's manuals.**
2. **Gather and analyze information:**
  - **Review existing manuals** to gauge the effects of the new/revised policies/procedures on big-picture decision making and other policies/procedures. Seek input from other department managers and supervisors. This review will help eliminate redundancies or conflicts between policies/procedures and may highlight other areas for improvement.
  - **Gather information from knowledgeable people:** Human Resources and Legal personnel, managers, supervisors, technical trainers, etc.
  - **Gather information from written sources:** existing training materials, manuals, industry forms, federal and state regulations, white papers, professional publications, vendor information, safety reports, blueprints, etc. Select current, authoritative sources.
  - **Answer these questions about your topic:**
    - What questions will managers, supervisors, and employees have?
    - What are the most common errors made or misunderstandings?
    - According to safety reports and vendor information, what precautions and reminders need to be listed to prevent accidents and damage to equipment and documents?
    - What is the most complex information? Do we have enough information to ensure understanding? If not, what further information is needed?
3. **Prepare the rough draft:**
  - **List key issues or required tasks.** As needed to fill in any gaps, prepare a question list for knowledgeable people.
  - **List any hazardous conditions, materials, and activities.**
  - **As applicable, list required safety practices; list materials and equipment.**
  - **List words for inclusion in the glossary.**
  - **List clarifying examples. Generate rough illustrations.**
4. **Review the draft for accurate and complete content.** Make any necessary additions or changes.
5. **Review the draft for mechanics**—punctuation, spelling, usage, grammar, and sentence structure. Review the corrected draft to ensure changes have not affected content accuracy.
6. **Assemble the manual with its accompanying forms, appendices, etc.**
7. **Have a fellow expert and an intended end-user review the manual without explanations by the writer.** Mark sections where more or clearer information is needed.
8. **Rewrite sections requiring revision.** Review final draft for content and mechanics.
9. **Establish a review and update procedure.** Keep a log of manuals so that all copies can be located and kept up to date. Decide how to collect revision ideas throughout the year. Review the manuals at least annually and update them as necessary.

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