Tips for Developing Procedures

Procedures prepare organizations to groom less experienced staff to guarantee that essential management positions are kept occupied when someone leaves. Use a consistent format for all procedures.

Items to Consider

✓ Will employees understand what is expected of them?
✓ Disputes may be resolved by determining whether or not procedures have been followed.
✓ Procedures already in place in case of emergency.
✓ Customers receive a consistent level of services that may increase customer satisfaction.
✓ It provides proof that your organization has strict performance requirements for employees.
✓ It reduces risk to the organization.

Action Steps

1. Find a template that fits your organization.
2. Create written step-by-step instructions on how to complete important tasks.
3. Include the inception date and any revision dates so that there is no mistakes about which version is current.
4. Ensure that the procedure is compliance with federal, state, and local regulations.
5. Set out in clear and simple terms what your procedure is for, how it is to be carried out and by whom.
6. Consider obtaining feedback from employees responsible for following the procedure.
7. Provide guidance for how an exception to the stated procedure will be handled (i.e. emergencies).
8. Keep it simple.
9. Clearly communicate procedure to employees to create buy-in. Acknowledge feedback.
   a. Hold an orientation meeting.
   b. Distribute a copy of all procedures to employees. Include when employees need to sign a copy.
   c. Refer to procedures in employee’s position descriptions.
   d. Post information in common work areas.
   e. Train and mentor employees.
10. Make sure procedures are being followed.
    a. Perform reviews and document results.
    b. Use result to determine positive feedback, training and/or disciplinary actions.
11. Change and update policies as necessary.