Communicate Virtually Anything
Communications solutions for virtually any organizational challenge

8 Tips on Writing a Great Procedure

Large or small organizations cannot afford to give people the wrong instructions; these 8 tips can help you write a great procedure.

1. **Know where the procedure fits in the entire process**

   Before you start on this specific procedure, list out all of the procedures you expect to include in this entire group. It will give you a better perspective on how all of these things fit together. It might also identify a "how to" in the process that you hadn't thought of before you saw them all listed out. If you are looking at the list and you don't know how you get something specific completed, you are missing a procedure.

2. **Know who you are writing it for**

   Is this for a scientist running a complex microscope, a new user running a software program, the guys on the line making gym mats or your cousin who is supposed to set up the cash drawer? Know something about who you expect to use the procedure to pick out the right language and correct level of detail.

3. **Give it a great name**

   Now that you know where it fits and who you expect to use it, give the procedure a name. A great name. The name should be active and as straightforward as possible. It should also completely describe what the procedure is for. If you are describing the steps on how to repot a plant, give it something snappy like "Repotting a Plant." While you are writing a "how to," don't give in to the temptation to use "how to" in the title. If you have a list of procedures and they all start "how to" it's really hard for people to find the specific procedure they are looking for.

4. **Tell them what this is for**

   Introduce the procedure with an explanation of what they are going to do with this information. Even if the title is short and to the point, you still want to reinforce what you are covering. Again, be specific. "Use this procedure to ..." is a great place to start. If you are introducing a new concept, you might also need to do a bit of extra explaining. Again, take the explanation to the level of detail your user needs to complete the task or get their job done.

5. **Explain what they need before they start**

   List out everything a user needs once they start before they start. If they are going to need a shovel at step 3, tell them in a prerequisites section. If in step 7 they need to check an on-line report, they will need to connect to the internet – so don't let it be a surprise – they might not be working at a machine that has internet access. By setting the prerequisites, you make it easier and more efficient for people to get their job done. It's possible they needed to have completed a procedure before this procedure. If so, let them know that, too. The goal is to give them whatever they need to make this procedure work.

6. **Make sure the procedure only covers one thing**

   A procedure has a number of steps someone has to follow. When you are writing the steps, make sure the steps all are pushing to complete this one procedure. Don't wander off in the middle and start to help a person complete a different procedure, even if they are sort of the same and you are thinking "as long as you are doing this procedure you can also do that, too." If these are the steps to repot a plant, don't talk about pruning unless pruning is a step.

7. **Make sure each step is one action**

   Each step should cause something to happen. Entering something at the computer and pressing the Enter key is a step, what the computer then displays is not a step. Digging the hole to repot a plant is a step, having the plant be more healthy is the what happens but is not a step. Whenever possible, give the people using your procedure a physical tie to the action. A screen print, a photo, a diagram. The overall goal is to help someone get this procedure completed in the shortest amount of time and eliminate any questions.

8. **Give them the result and any next steps**

   When the procedure is complete, tell them what they have completed. This can be a rehash of what they use the procedure to accomplish, and helps establish the boundaries. Then, when it makes sense, tell them what they might be doing next.