

Documenting Your Organization's Processes

by Dennis Hooper, copyright © 2011, published in the *Houston Home Journal* on Saturday, January 15, 2011

How do you teach new employees in your organization the specific steps required to accomplish their jobs? The probability is that in the first hours of the first day of work, you'll assign the new person to a relatively simple set of tasks. You might pair the new individual with an existing team member.

Once you've made the introductions, you ask the current team member to show the newbie how to perform the job. You leave and the experienced person starts demonstrating what to do. The new person, wanting to fit in and be accepted, watches and duplicates the actions.

Confidence grows quickly. The tasks seem simple enough. Pretty soon, the new person faces a slightly different set of circumstances. Wanting to be a good contributor, the new person either asks, "Hey, what do I do now?" or takes a risk and tries what seems appropriate.

At some point, if the new person wants to perform well, he or she might ask, "Is there a checklist or some set of instructions for what to do if something unusual happens?"

What's the answer to that question in your organization?

Your predecessor or you have probably recognized that a step-by-step description of appropriate actions would be helpful. So you've probably already had some experience with documenting your organization's processes.

Once you realize the value of documenting a "how to" sequence of tasks for one operation, the natural extension is to consider doing something similar for other functions. During your next meeting with the team, you ask everyone to write out the steps that are required to accomplish their jobs.

They look at you like you are crazy. A few people ask some basic questions and you wonder why you feel resistance building. What you've asked seems clear enough to you. You expect that over the next couple of days, you'll be bombarded by a whole flock of pages of written action steps.

Nothing happens. Or maybe a few people hand in a sketchy listing of "then do this" statements. You begin to wonder if what you've requested is worth the effort. You're at a decision point. Do you drop the initiative or do you decide to invest a lot more time and energy than you originally anticipated?

If you are interested in significantly raising the quality of your operations, documenting your processes is worth the effort. You'll want to standardize and organize your documentation. Further, you'll start looking for some education on how other organizations have handled this effort.

You may find yourself frequently torn between wanting to become more sophisticated in documenting your systems and wondering, "Is it really necessary to have our operating procedures written out?" Of course it's not necessary. You functioned before you started this project, right? Lots of other organizations do well without written procedures. Still, you've found value in what you've done so far.

When I work with clients, I encourage them to start the effort of documenting their processes and see for themselves what benefits they discover. One of the first is that employees find it easier to cover for vacations and other absences of their teammates. Of course, training new employees is easier.

Experts in the field of quality have recognized that you have no technical right to expect improvement until you become intentional in analyzing your processes. And the first step to move in that direction is to document the way you execute the work.

Pretty quickly, the areas where poor performance occurs become evident. Desirable improvements (to reduce waste, improve effectiveness and reliability, reduce costs, and improve quality) will present themselves immediately. You'll start making beneficial changes before you even finish documenting.

You should establish some basic expectations as you ask your employees to help with this effort. Very simply, the documentation should describe what you do, and an independent observer should be able to see that what you actually do is what's described on the page. Many organizations begin to accumulate documented procedures in a notebook kept in a central location.

Each procedure should have a descriptive title, a date identifying the most current revision, and the name of the person who generated the documentation. You'll do a lot of updating initially; that reality could contribute to the premature death of your initiative. To keep progress alive, make updating easy, even allowing strike-throughs and handwritten enhancements.

Sometimes employees seem reluctant to put their name on documented procedures. Maybe they are humble or they don't want to be held accountable for what's there. But suggested improvements or questions about what something means may be lost if there is no real human being to approach.

Once you have a year of experience with documenting your processes, you or someone you designate should investigate both the criteria for the Malcolm Baldrige National Quality Award and the ISO-9000 quality standards. The topic of "documenting processes" is far more extensive than you ever imagined!

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