

Basic Requirements for writing Policies and Procedures

1. The tone or language.
2. Write in plain English and be clear and concise
3. Avoid jargon and unnecessary technical terms or overly formal words and phrases
4. Avoid acronyms unless they are well known in the business
5. Keep the language current, in the present tense
6. Use the active voice.
7. Write your policies and procedures with headings, subheadings and bullet points to ensure easy reading.
8. The policy statements are usually structured so they do not say we or you.
 - a. For example, the statement 'the terms of trade will be advised to the customer'. The only time a 'person' is mentioned is when the statement refers to specific actions of a particular person such as the credit manager, not the person name but the position. Otherwise the policy would have to be changed every time there was a change of employee.
9. Write positive statements arranging them in a logical order
10. Insert headings where the topic changes.
 - a. If several departments are involved insert major headings for policies or procedures for a single department otherwise refer to all relevant departments in the scope.
11. Write step by step procedures in logical sequence so the user can follow from start to finish
12. The policy should include the person or position who is responsible in case there is a situation where the policy does not provide enough information for the employee to make a decision
13. Have the document proofread by others to ensure there is clarity in the statements.
 - a. If a statement is ambiguous then employees may place their own definition on the intent of the policy which may differ from management goals.
14. When preparing a policy document, it is helpful to included employees who will be following the procedures for their input, particularly if you are changing the procedures from what has been the norm.
15. Include a purpose for the policy.
 - a. Employees will often respond better if they know why they are doing a task or following a rule.
16. The goal is to keep the document as short as possible and no more than three pages long.

17. The policy only needs to state what is needed to be said.
 - a. Although do not be too brief, or you may give up clarity.
18. Leave out unnecessary information relating to the skills that an employee should have in order to do the job.
 - a. For example, the statement, 'receipts will be entered daily'. You would not describe how to enter a receipt or how to use the accounting software as you will assume the employee knows how to enter a receipt.
19. Some policies refer to other policies and there is no need to reiterate what is in those other policies.
 - a. The employee can refer to those policies if needed.
20. Don't mix up information in your policies with what should be in a job description.
 - a. If the policy is too long and complicated, then employees will avoid it or become confused. It is far easier to have a meeting to discuss a policy if it is brief and concise.
21. Have a separate file for forms, number them and refer to them in the procedures.
22. A Policy should be a living document is so far as business improvement should be an ongoing and continual process.
 - a. Make sure you document and date every time you have a new version and advise all employees of the new version. Otherwise you may find someone making a decision based on outdated policies.
23. All applicable employees should have access to the policies to refer to.
24. The policies in this course are structure in three parts.
 - a. The policy,
 - b. The implementation outline
 - c. The procedures.
 - d. Depending on the policy there may be variations in the structure.
25. Within the policy there is a section called scope where you nominate all the people in the business who you think need to observe the policy rules.
 - a. Much of the time your policies and procedures will include all employees but some may just include the administration and sales employees, and, of course, management.
26. And so everyone knows what is expected of them, a training session should be held so employees know what policies and procedures they should be complying to.