

all things
ADMIN

TOP 10 TIPS for PROCEDURES



1

Create your procedures before you need them. Your documentation will be more complete if you aren't under a deadline.



Make a list of everything you do each day. Don't assume anything is too small or unimportant to be included on your list.

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Always use a template. This keeps typed or handwritten procedures consistent in layout and format.



Keep blank procedure template forms easily accessible. As you work on things throughout the day, grab a form and jot down the steps as you complete them.

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Make your procedures easy to read. People are more likely to read a bulleted list of commands than complete sentences, especially if they are in a hurry.



A handwritten procedure is still a documented procedure. Your procedures don't have to be perfectly formatted, they just need to be functional and available to the people who need them.

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Use your smart phone camera to capture visuals. Pictures, videos, and audio are all great for adding detail and clarity to your procedures.



Work on no more than five procedures at a time. That's one procedure per day for a week — it's manageable and motivating.

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Create your procedures in print and digital formats for disaster recovery purposes. Paper procedures are helpful if there's no power or internet. Digital files are necessary if you don't have access to your workspace or building.



Keep your procedures binder within arm's reach. You need to be able to access it without getting up to retrieve it from a shelf or file drawer.

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