

### **In this Issue:**

#### ***Characteristics of a Well-Written Procedure and Work Instructions***

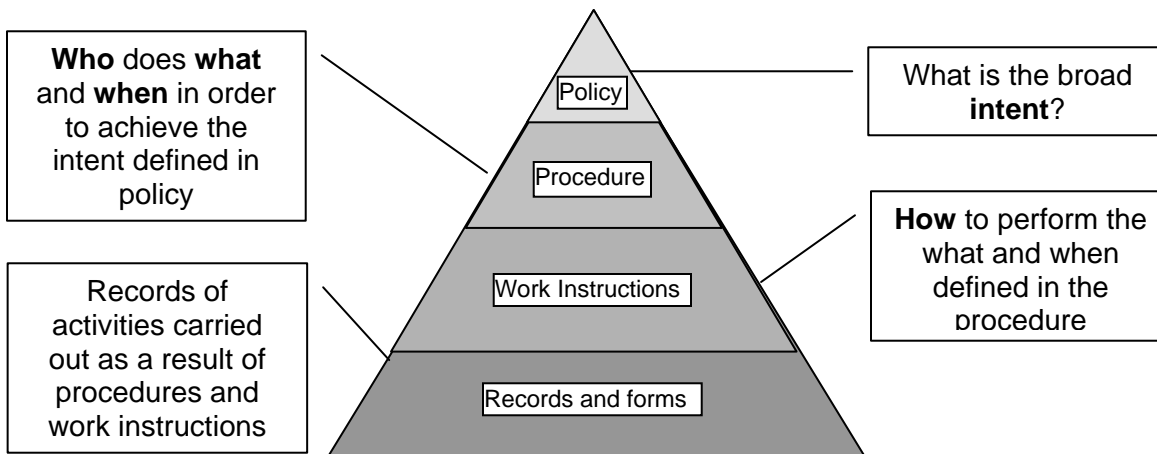
#### ***Sustaining Edge Solutions New WEBSITE***

*Last month our newsletter topic was "How lean is your company's business operating system documentation?" Due to the positive response we received, a number of our readers asked us to discuss the topic of this issue. Thanks to those who responded, and keep submitting those suggestions!*

No matter what your type of business, operating procedures and work instructions exist. Without them your business would be in chaos. Companies registered to international standards such as ISO 9001, know the benefits of what a well written procedure and work instruction can do; reduce process variation, provide employee clarity and understanding of "who" does "what" and, if applicable "when" and "where." These are what a procedure should explain. The following recommendations will allow for an efficient and employee useful procedure.

- Although there may be a few exceptions, most procedures shouldn't exceed four pages. The actual procedure should start with page 1, not on the second or later. You should never have redundant statements within a procedure or between procedures and/or work instructions.
- Procedures should refer to other documents or forms within the body of the procedure.
- Make your forms self-explanatory and if needed, insert examples
- Eliminate Policy. This is a procedure. Policy isn't needed here; you already covered it in the quality manual.
- Vocabulary / Definitions / Abbreviations: These can be addressed in the body of the procedure. When the user is reading the word or phrase in the specific area of concern, understanding and learning of these takes shape much better than having a laundry list as an appendix.
- Procedures should contain electronic linkages to other documents (fact is, your entire documented system should) so that, if necessary, the user is only a click away from reading them and using the right stuff.
- Insert responsibilities into the body of the procedure where the responsibilities are intended to be. Remember, your process as a flow from one action to the next. Having a list of responsible individuals/departments at the start of a procedure invites confusion and lack of organizational accountability.

- For a procedure, include the Purpose, Scope, and Procedure (consisting of responsibility and action), and revision record.
- Organizational documentation can be visualized as a pyramid with four levels.



### Do I really need a work instruction?

There is a simple test as to whether your department needs to develop work instructions - the "hit by a car test."

For example, if a car hit a person such as a departmental administration person, would the procedure provide sufficient information to allow a stand-in staff member to perform the detailed tasks. If the answer is no, then the department needs a work instruction on the process.

The major advantage of work instructions is that they can be used to train new staff. They ensure that all the knowledge that has been gained about a process, is transferred to each new staff member. Work instructions avoid reinventing the wheel.

### How do I go about developing a work instruction?

The following steps can be used in developing work instructions:

1. Understand exactly what the work instruction is about.
2. Review the procedure(s) and decide which areas contribute to enhanced risk of not knowing how.
3. Collect information on what is currently happening, e.g. talk to other departments.
4. Develop the departmental interpretation of the procedure (who does what, when and how).
5. Determine the best format for the work instruction. Check to see if there is an existing work instruction that the information can be added to.

Note: Work instructions are often developed for specific user groups. There may be separate work instructions for others. Each work instruction would only contain information that is relevant to each user group. This approach ensures that staff is not overloaded with information - they only know what they need to know.

Features of well written work instructions include:

- Less is more - avoid excessive wordage
- Include document control - who generated the document, when the document was printed
- Written by users - they are the obvious experts on "the how"
- Easily understood - test them on other users

### Document control

All work instructions should be subject to document control. As a minimum the work instruction should have a date published and who authorized its publication.

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We Have a NEW WEBSITE!  
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[www.sustainingedge.com](http://www.sustainingedge.com)

We are proud to announce that Sustaining Edge Solutions, Inc. has a new website look and design with enhanced information for our clients and everyone interested in improving business performance. More enhanced content coming...check back soon!

We have also acquired another domain name [www.qualityguru.com](http://www.qualityguru.com). Our purpose for this website is to use it as a portal to announce and include white papers, presentations and material, upcoming events of interest, and a quality improvement bulletin board for all to utilize.

***We are asking all our readers to submit ideas to us on what types of information you would like to see on Quality Guru. Here's one:***

1. Would you be interested in posting questions regarding performance improvement methods and ideas of what worked, what did not, thoughts, inquiries, help me questions, and receive answers from the Quality Guru and many others in the bulletin board community involved in the field of quality and performance improvement?

Let us know  
[admin@sustainingedge.com](mailto:admin@sustainingedge.com)

**We want your ideas! Help us improve our value to YOUR BUSINESS !!**

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