



Preparing Employee Policy Guides

The ultimate goal in guide preparation is for the finished product to be inspired by and useful to its readers. The purpose is to provide readers with a readable document including specific information, and to be readily understandable and applicable. Creating a guide that works, requires the writers' awareness of needs of potential readers, and an overriding commitment to creating a friendly product that is a functional work tool.

Seminar Objectives:

To examine components of user-friendly guides; to follow the development process in a logical, sequenced, practical manner. Participants will discuss techniques for efficiency and long-term maintenance practices that will keep information credible, reliable, and indispensable to users.

Topics:

- ◆ Benefits of guide development: process, content, format
- ◆ Importance of planning, participation in, and timing of document production
- ◆ Stages of development: sequencing and organizing components
- ◆ Components and features of an ideal system of guides
- ◆ Roles of team members of the policy and procedures committee
- ◆ Defining the guide: context, readership, purpose and content
- ◆ Structuring a preliminary table of contents: headings and categories for reader usefulness
- ◆ Decision-making issues for its development: technical features, distribution
- ◆ The development process: coordination, writing, review, and approval
- ◆ Designing a realistic schedule: general timing goals, specific time frames for stages
- ◆ Writing the first draft: delegation of tasks, addressing specific needs of readers
- ◆ Presentation, terminology, writing style, and complimentary illustrations
- ◆ Categorizing material for clear and logical progression and easy cross-referencing
- ◆ Page format design as a consistent, readable way of presenting information
- ◆ Scheduling and documenting reviews and revisions to meet standards and changes
- ◆ Preparing the manual's introduction: reader orientation
- ◆ Editorial review, content review, and final approval
- ◆ Methods for separation of policies and procedures for reader benefit
- ◆ Obtaining costs quotations and ordering supplies
- ◆ Defining parameters for distribution: uniform, diversified
- ◆ Compiling the master copy and obtaining signatures for final approval
- ◆ Storage of outdated policies and procedures
- ◆ Evaluation and updating: soliciting feedback, staying on top of changes
- ◆ Dealing with time constraints, motivation for the duration
- ◆ Refurbishing guide systems: preparing specialty guides