

---

## Tips for Writing Procedures

The Writing Company  
thewritingcompany@earthlink.net

The Writing Company Tip Guides

---

## What Are Procedures?

- ❑ Step-by-step instructions for carrying out a task.
- ❑ Step-by-step instructions for carrying out a task within a work group or across work groups.

---

The Writing Company Tip Guides

---

## How Do Policies Differ from Procedures?

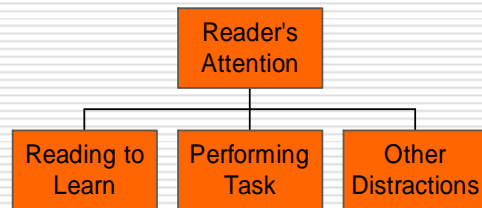
- ❑ A policy describes or explains company rules, their purpose, and their conditions; for example, *a policy describes the purpose* of employee evaluations.
- ❑ A procedure describes the step-by-step activities required to carryout a task; for example, *a procedure describes how to conduct* an employee evaluation.

---

The Writing Company Tip Guides

---

## Demands on Readers



---

The Writing Company Tip Guides

---

## How Readers Follow Procedures and Instructions

- ❑ Few readers read instructions entirely before trying to perform the task.
- ❑ Most readers skim instructions as they try to perform the tasks.
- ❑ Readers need the action stated first, so they know what they should DO.

---

The Writing Company Tip Guides

---

## Tips for Writing Procedures

- ❑ Identify all the tasks (steps) in your procedure (the *how* and *when*, not *what* or *why*).
- ❑ Identify the actors. List them by job titles.
- ❑ Organize steps in sequential order.
- ❑ Add conditions, notes or cautions.
- ❑ Have someone test your procedure.

---

The Writing Company Tip Guides

## Playscripting

---

- Relies on actors and actions.
- The *actor* is the person who performs the action.
- The *action* is the task the actor performs.

## Playscript Method

---

- Actor
  - Driver
- Action
  1. Insert key in ignition.
  2. Turn key until engines starts.
  3. Depress gas pedal until car begins to accelerate.

## Format Is Key

---

- Use a descriptive title so readers know what the procedure covers
- Space out individual steps for easy reading
- Use a diagram to show parts
- Use headings to designate each section of the procedure

## Procedure Format

---

- **Introduction** (how the product works/what tools are needed, etc.)
- **Applicability** (who performs task)
- **Materials needed** (what materials or setup is needed)
- **Steps** in the procedure
- **Troubleshooting tips**

## Where To Start

---

- Write a plan by answering...
  - Why is the procedure necessary?
  - When should it be done?
  - What equipment is needed?
  - What are the steps?
  - What if the user has problems?
  - What follow-up is needed, if any?

## Analyze Your Audience

---

- What do readers know about the task? Have they performed similar tasks?
- Do they understand the purpose of the procedure?
- What equipment, forms, materials will they need?
- What details will they need? Explanations?
- What visuals will help them?
- What terms must defined for them?

## Tips for Writing Steps

- Begin with a verb (the action)
- Separate each action into sequential steps
- Describe the results of the action
- Use active voice (implied "you")
- Use verbs consistently
- Introduce cautions before steps

The Writing Company Tip Guides

## Deleting File from File Queue

1. Highlight file you want to delete
  2. Click on DELETE button. A dialog box appears asking you to confirm the deletion.
  3. Click on the OK button.
  4. Check print queue
- Results: The file should not appear in the print queue

The Writing Company Tip Guides

## Problems to Avoid When Writing Steps

- Stating more than one action
- Using vague verbs
- Omitting key words (telegraphic writing)
- Use of passive voice
- Use of negatives

The Writing Company Tip Guides

## Separate Actions

- Start entering needed information in transmittal and monthly salary for all employees enrolled in the fund. Also enter tax-deferred account contributions, if any.
  
- Enter the following information for currently enrolled employees:

The Writing Company Tip Guides

## Avoid "Vague" Instructions

- Start entering needed information in transmittal and monthly salary column.
- Fill out form completely.
- Check print quality.
- Make sure there is sufficient air in the tire.
- What information?
- What does "complete" mean?
- What should it look like?
- What is "sufficient"?

The Writing Company Tip Guides

## Problems with Passive Voice

**Steps are directions, not explanations...**

**Compare:**

- Form 833 should be filled out completely.
- When complete, this form should be sent to personnel.

**Compare:**

- Complete Form 833.
- Send Form 833 to personnel.

The Writing Company Tip Guides

## Problems with Negatives

### Compare:

- ❑ If Form 833 is *not* signed, do *not* send to Personnel.
- ❑ Make sure Form 833 is signed by the supervisor before sending it to Personnel.

## Problems with Parallelism

### Not parallel

1. **Test** programs should be loaded first.
2. Next, the **program status** must be verified.
3. If there are anomalies, identify these.

### Parallel

1. Load test programs from H Drive.
2. Verify the status of each program listed in column 4. *Note: Status should be "C" for completed.*
3. Use form xx and list programs that are not completed.

## Writing Conditional Steps

- ❑ Describe the condition:
  - **If the red light is blinking**, restart the computer before installing the software.
  - **If the green light is on**, click on the software icon to begin installation.
- ❑ State conditions in the positive:
  - If the valve **is not open**, then adjust flow.
  - If the valve **is closed**, then adjust flow.

## Using Visuals

- ❑ Does the user need to see the parts of some object?
  - ❑ Use drawings, diagrams, photographs
- ❑ Does the user need to see the overall process?
  - ❑ Use flowcharts
- ❑ Does the user need to complete forms?
  - ❑ Use sample with callouts
- ❑ Does the user need to see how to do something?
  - ❑ Use drawings, diagrams
- ❑ Does the user need to see how the process fits into an overall scheme?
  - ❑ Use charts, like organizational charts