

Write Procedures Checklist

Step	Description	Principle #	<input checked="" type="checkbox"/>
1	Meet with the appropriate staff – this generates involvement and will develop ownership and greatly assist with the implementation.	1	
2	Explain the purpose of the meeting – “to document a procedure” – you need to win their mind and their hearts – explain that a procedure will make their job easier and improve the delivery of the output to the customer - a win:win per se.	1	
3	Discuss the process – what works well and what doesn’t ... this develops the appetite to document the ‘agreed best way’.	1	
4	Explain that you will be documenting the current state/‘as it’ This is needed to get on the same page before we start to improve the process.	2	
5	Record improvement ideas for a later version It is natural that improvement ideas will emerge – so add them to a list for later examination and possible implementation.	2	
6	Name the procedure (revisit this after drafting and refine if necessary) An accurate name helps staff to find and use the necessary procedure.	4	
7	Write the purpose of the procedure This focuses people’s mind on the intent – which goes a long way to getting it done right.	3	
8	Identify the Start and End points You need to get the boundaries set first – this focuses the mind.	3	
9	Identify the 3-5 main steps – from start point to end point This keeps you at the macro level and keeps you from diving into the detail unnecessarily or too quickly.	4	
10	Decide the level of detail required for each step Keep asking – what is the risk – and remembering less is more.	4	
11	Start each step description with a verb (doing word) People want to know what action they need to take – so start with the verb to grab their attention.	3	
12	Keep the language ‘directive/instructional’ It needs to be in first person as the procedure is instructing the reader what to do – not writing a third person novel.	5	
13	Avoid repeating information – reference other documents Duplication of information can result in mismatching of information – as an improvement in one place occurs but in the other.	3	