

Training Staff to Adhere to Policies and Procedures

As we noted in [our last blog entry](#), the purpose of policies and procedures is to create repeatable, reliable processes that don't require senior management oversight to keep the organization humming. Developing effective policies and procedures that contribute to smoother operations is the first step. However, you still need to train the staff to make sure the procedures are implemented properly and tracked effectively, so executive staff can focus on strategic issues without getting mired in managing day-to-day operations.

Your most effective training tool is complete documentation. A well-crafted policies and procedures handbook eliminates a lot of guesswork and captures every step required to accomplish a set task. Procedures need to be designed to implement well-defined systems using a step-by-step explanation that anyone can follow. With [good documentation](#), any employee should be able to pick up a manual or review a protocol and follow the instructions to successfully complete the task at hand.

Once you have created the procedures manual, you need to test both the procedures themselves and the procedures manual. Use the manual as a training guide. Provide hands-on training for the staff, walking them through the procedures the first time and using the manual to guide them if they have questions in the future. The training process itself will highlight weak areas in the written documentation. The staff also can contribute to the documentation by identifying gaps or areas that need clarification.

An important aspect of procedure training and documentation is version control. Procedures evolve with the needs of the company, and the manuals that accompany those procedures need to change with the new procedures. The challenge is consolidating that knowledge in one place where it can be kept current and accessible. Too often staffers will amend a procedure to accommodate changes in their area, such as a new vendor or new equipment. Those procedural changes may be noted by an individual within the department, but they seldom make their way back up the chain of command to be assessed and included in the master copies of the procedural manuals. If the keeper of that procedure should be out sick or leave the company, the procedures that were in their charge no longer work because they weren't properly documented.

To help manage procedures and provide the high-level oversight that the executive team needs to keep things on track, use simple tools that keep the staff on task and provide a means to track their progress. Simple checklists and reporting protocols will verify that each step in the procedure is completed as needed. Any deviation from the procedure should be recorded and reported, in writing, so all changes can be assessed and the necessary documentation amended. Using information gathered from the checklists and reports makes it easier to update the written protocols and store them where they can be easily accessed whenever they are needed.

Effective procedure training is largely a matter of explain, refine and repeat – develop the step-by-

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step process, document it, test it, and refine it. As part of your training, be sure to create the feedback mechanisms necessary to capture any refinements or necessary changes. And be sure to amend your master documentation so the procedures are always current.