

A procedures manual saved me! A true story of SOP efficiency

How do you become the hero of heroes at work? By preparing others for unexpected interruptions or breakdowns in the processes that face them every day. That's where a good administrative procedures manual comes in.

A true story: Panic!

It was my third week at work and I was already feeling a little shaky about my new admin job—the processes were more complex than I was used to, and there didn't seem to be much of a sense of humor to go around when things went wrong.

And then, in the middle of deadline season, the admin who'd been training me didn't come to work one Monday. After having been turned down for a new position on Friday, she'd decided to return to her home country of Australia—very suddenly.

She should have been resented for not giving notice, right? And certainly I was mortified, because I was now responsible for many of her tasks, few of which I truly understood.

Then I found the procedures manual she'd left behind.

An admin's genius

Literally by the end of Tuesday afternoon, I felt on safe and sure ground, and all because of a three-ring binder Susan had prepared, titling it simply: PROCEDURES. It covered everything I'd need to figure out my way through the job. I would have preferred to have her there to train me, sure—but she'd done several helpful things in the preparation of the binder that enabled anyone to step in on a moment's notice and keep the office going. In particular:

1. **She organized well.** Susan had divided her sections about all the most common office procedures using tabs—for example, MAILROOM, PRINTING, EXECUTIVE REPORT ASSEMBLY, MEETING MINUTE PROCEDURES, etc., but that's not all she did. In the second half of the book, using a different color of tabs, she duplicated the front half's content but divided it in different ways. For our organization, it made sense to do so by day of the week, i.e. the section called "Thursday" contained information about the key processes that needed attention on that day each week.
2. **She spoke in a trainer's voice.** Susan populated the descriptions of her procedures with little asides that answered questions I had. She even boxed them in gray so they stood out. As an example, I found myself wondering, "Why would we even need the courier service she's describing?" Susan answered that question in a gray box. In some other cases, she led off a section by explaining why the process was so important.
3. **She didn't just tell, she showed.** It's one thing to describe how a report needs to be prepared; it's another to give a visual example. Using screen captures, Susan showed what final products should look

- like, and when it came to software, she took the user through each step of a procedure using pictures.
4. **She kept it all current.** Each section of the binder showed the date the procedure was last updated. This was especially helpful when it came to a particular instruction involving sharing files. I noticed that the procedure hadn't been updated since the previous January, and I knew that a new system had been put in place since then, which made about half the procedure moot. Without that date, I wouldn't have known that I needed to do some investigation before proceeding with the written plans before me.
 5. **She made it available!** When Susan left, she told her supervisor in an email where the binder was to be found, what it contained and what it left out. She'd set up a folder on the network in which each component of the manual was labeled clearly and was accessible to all. *And* when I wondered aloud to someone why the print in the binder was so large, I was told it was intentional because we had a lot of older workers in the office. Nice detail!

Creating my own procedures manual

In the four years I worked for that organization, I used Susan's admin procedures manual to gradually grow my own, working within that same framework. The binder shell itself never even changed; I can't tell you how many times I opened and closed those rings! Here are a few lessons I learned on my own:

1. **Give deep background.** I soon realized how easier it was for a new person to do their job when they realized how important some tasks were compared to others. In the procedures manual, I highlighted the most important tasks with a blue box explaining their importance.
2. **Create a "tools" sheet.** At the beginning of every procedure being described, I put a red-bulleted list of the things an admin would need to complete all the tasks. This included everything from a hole punch to the locations on our network where key files were stored.
3. **Don't assume anything.** The key to putting the manual together was that *anyone* should be able to pick it up and get to work. I often found myself using terminology and acronyms that might confuse someone who hadn't worked there for a while, so I replaced those when I could. Years of experience sometimes made me forget that not everything is obvious.
4. **Prepare the manual for the *real* job, not the job *description*.** One piece of advice I took from a fellow admin really paid off. She told me to spend a month writing down my tasks so I wouldn't leave anything out of the binder. Relying only on memory was a guarantee I'd forget all the little things we did that aren't in any job description.
5. **Back up electronically.** There were a few too many handwritten notes and unexplained pages in the original procedures manual I first worked with. I learned to make all corrections on the electronic documents instead, and then I treated the printout as something that was merely assisting the electronic version.