

How To Create Or Update A Procedure

Use/adjust these steps to create or update each policy, procedure or checklist that you have identified for your business/workgroup. Identify responsibilities & deadlines for each step. Treat it as a project.

- A. IDENTIFY THE TITLE & DOCUMENT THE PURPOSE.**
- B. DETERMINE REQUIREMENTS - BRAINSTORM.**
- C. LOOK AT EXISTING POLICIES, PROCEDURES, MANUALS, QA, OH&S MANUALS, HEAD OFFICE, ETC. CONSULT PROCESS OWNER(S).**
- D. SET THE STANDARD, DETERMINE THE STEPS/HOW TO'S, IDENTIFY LINKAGES, TOOLS & ATTACHMENTS, CHECKLISTS, ETC.**
- E. DRAFT PROCEDURE & TYPE. USE SHORT "COMMANDS" AND START EACH ACTION WITH A VERB OR ACTION WORD (JUST LIKE THESE INSTRUCTIONS).**
- F. CHECK COMPLIANCES (QA, OCCUPATIONAL HEALTH & SAFETY, ETC.).**
- G. TEST / CIRCULATE FOR COMMENT / REVIEW/ FEEDBACK.**
- H. AMEND AS REQUIRED AND FINALIZE.**
- I. SCHEDULE STAFF TRAINING/REVIEW WITH WORKGROUP AS APPROPRIATE AT MEETINGS, OR IN YEARLY PLANNER.**
- J. OBTAIN APPROVAL/SIGN OFF.**
- K. SET REVIEW DATE.**
- L. ADD TO/UPDATE POLICY & PROCEDURES MANUAL, CONTENTS PAGE, REVIEW LOG, ETC.**
- M. DISTRIBUTE.**
- N. ADD TO JOB DESCRIPTION(S).**
- O. UPDATE MEETING AGENDAS FOR PROJECT & ONGOING MONITORING, AS APPROPRIATE.**

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