

If you're part of BIG, you probably have written procedures for everything: for starting new projects and for installing shaft A into slot B; for handling customer complaints and even for writing new procedures. If you're part of SMALL, you're probably more used to "let me show you how we do things around here". Either way, from SMALL to BIG, we all use procedures, whether written down, acted out or made up on the spot. We all climb stairs one or two steps at a time, we all put our shoes and socks on¹, and we all do specific tasks one after the other to get our jobs done. That's what procedures are: step-by-step methods for getting things done.

So are written² procedures good or bad? Do they help us work or do they stop us from improving? Should we have procedures for everything or should we try to stay informal and fluid? Are procedures effective and useful, or are they ignored and limiting?

I've heard "Everyone in the company should answer the phones exactly the same way", and "If it's worth doing, we need a written procedure for it". I've also heard "We can't use procedures because we need to be fast and flexible" and "We don't even use the procedures we have now". Who's right? Are procedures a waste of the paper they're written on or are they vital to your success? The answer is: both and neither.

Procedures are just ways of doing things, and we all use them. So, rather than asking whether procedures are good or bad, the questions we should ask are:

"When should we use a written procedure?" and

"How detailed should that procedure be?"

To answer these questions, we can use a very simple decision process that balances the principles of KISS and TELL.

It's always nice to KISS (Keep It Simple Stupid) and we should all try to do this as much as possible³. Strive to find the simplest solutions to problems, make the hard parts easier, streamline how you do things to get rid of waste, make forms easy to follow and use clear simple language, use pictures and graphics to help get the point across, and keep rules, regulations, specifications, documentation and paperwork to an absolute minimum. Simplify, simplify, simplify!

But (and here's where many KISS fans screw up), simplifying doesn't mean that you get rid of all paperwork and procedures. Simplifying means getting rid of anything that is not needed, and this is where TELL comes in. To be effective, written procedures must be simple, but they must also be Thorough Enough to Limit Loss (TELL).

¹ Hopefully not in that order.

² I use "written procedures" to include any documented procedure, whether writing, web-based, drawings, photos, video, or whatever is appropriate to clearly outline exactly what needs to be done.

³ Be careful not to confuse KISS (Keep It Simple Stupid) with kiss ass (seek or gain favor by fawning or flattery) or with kiss (press with the lips slightly pursed, or part the lips to emit a smacking sound, as an expression of affection, love, greeting, reverence). Using the wrong KISS in professional situations can lead to personal injury and other unexpected results.

Think about why you do each step in a procedure. Each step should, at best, add some value to whatever you're working on. If a step is supposed to add value but doesn't, you have loss. For steps that are designed to add value, the procedure must be specific enough to make sure the value actually gets added. For all steps, the procedure must be specific enough to make sure value does not get decreased. If completing a step in your process decreases value, by accident, error, or misunderstanding, you have loss. So the guiding idea is to make procedures as simple as possible while making them thorough enough to limit the possibility of loss.

If you're a manufacturer and the step is to drill a hole in a plate, you add value when you drill that hole with the right diameter, the right depth, and in the right position. If any of those features are wrong, you have loss, whether you detect it immediately and rework or scrap the plate, or whether the plate goes into use and doesn't fit or work correctly. If you're in health services and the step is to calculate the dosage of a medication, you add value when you get the dosage correct. If the dosage is wrong, you have loss, or potential loss.

If the step isn't supposed to add value, but you haven't yet been able to eliminate it from the process, you just need enough detail to make sure the task gets done without taking away value and producing loss. For example, if the step is to move a loaded pallet in your warehouse, you have

loss if the pallet or contents are dropped, if someone is injured, or if you drive the forklift off the loading dock⁴. Moving the pallet isn't expected to add value to the parts, but it also isn't expected to decrease the value.



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So, when should we use a written procedure? How detailed should it be? We should use a written procedure when we stand to lose more than it would cost to create and use a procedure. If the chance for loss is large, the urgency for a written procedure is greater. If the chances of loss are trivial or acceptable, the need is lower. To figure out what you might lose by not documenting a specific procedure, think about direct costs from damage or mistakes, losses due to injuries, rework or warranty, losses from environmental impacts or customer liability claims and losses from not complying with your industry's regulations. Some of the most important losses are impossible to measure but must be considered. For example, if employees are routinely forced to make snap decisions and judgments on crucial issues with nothing to guide them, or if too-simple procedures result in unpredictable variation and poor quality work, what's the long term effect on pride of workmanship and employee retention? The point is, try to look at all the possible losses, not just the obvious "hole in the wrong place" losses.

To find the price of creating a written procedure, think about the direct costs of getting it down on paper, the costs of communicating and training existing and future staff on using that procedure, the costs of ensuring that the procedure is used, followed and kept

⁴ Unless of course your product is "Extreme Forklift Videos" in which case you've added value.

up to date, and the impossible-to-measure costs from effects on staff attitudes and corporate culture due to "adding another procedure". If the price is less than what you think the losses might be, you're better off writing down and maintaining that procedure.

Now, if we've decided to implement a procedure, how detailed should that procedure be? The answer is: as simple (KISS) as it possibly can be, while still being thorough enough to limit the losses that you are trying to prevent (TELL). A too-simple procedure that leaves critical decisions open to interpretation is a recipe for loss. A too-simple procedure that requires employees to remember information that could easily be charted, plotted, written down, or displayed, will also produce variation, mistakes and loss. A too-simple procedure that doesn't explain when to use specific protective gear is a recipe for injury. A too-simple procedure that fails to outline proper waste disposal is a recipe for environmental damage.



And, if flexibility is your concern, you can include several options for certain steps in a procedure, with help for employees to judge which option to use. Or, you can include kick-out points that give employees clear guidelines on how and when to jump out of this procedure for special situations. Kick-out points help employees judge when the procedure isn't appropriate, and what to do or who to contact to handle the special situation. Leaving all the steps to chance because you want to maintain flexibility might mean too much KISS and not enough TELL.

So, to help your people be effective at their jobs, balance the ideas of KISS and TELL to decide when written procedures are needed and how detailed they should be. Look at the losses that might arise from NOT having a documented procedure, and look at the price of implementing and maintaining another written procedure. Keep your procedures as simple and as few as possible, while making sure they are as thorough as needed to limit losses.

Take care out there.

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