

Best Practice Clinic: Writing usable procedures

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IN THE DECEMBER 2004 BEST PRACTICE Clinic I explained that it was fundamental to LAW 9000 to identify the processes used in managing the practice and delivering legal services. Also fundamental, and inescapable, is that those processes must then be documented.

What makes a good set of procedures?

A good set of procedures doesn't just happen. It is planned, executed, and tested with the same attitude, care, and attention as the process itself. This means it will be user-focused, aimed squarely at the user's needs, supportive of the task at hand, and delivered appropriately, so that it is readily available and accessible.

What is 'user-focused'?

This approach gives first priority to the user's perspective and the tasks the user needs to handle. The first step in designing good documentation is a user-task analysis. This will cover who refers to the procedures (audience, role), what they need to do (tasks), what they need to know to do them properly, and what they already know.

This analysis may reveal there is actually not one but two or more distinct groups of users who need different types or levels of information. If so, it may be better to split the documentation so that users are not burdened with information they will never need to refer to.

The best method of delivery

Depending on the situation, there are several options for delivering procedures:

- Online: obviously the preferred option for ease of update and access. There are several methods of online delivery.
- Paper: the time-honoured method still highly favoured.

- Quick reference guides: useful where users are experienced and competent in their jobs and no longer need to refer to the main body of documentation.
- Wall charts: often overlooked, this is very effective where the amount of information is not extensive and can be easily read and absorbed in single view.

Whatever the choice, it must be appropriate to the environment of the user.

Layout and presentation

Layout and presentation are vital. Sometimes they alone determine whether a user will read past the first page or not. When designing documentation, you should think about the following:

- Choose a readable font. When all is said and done, the best fonts to use are Times Roman or Helvetica (Arial). Research shows that the most readable fonts are the traditional serif fonts such as Times Roman and the minimum size is 10 point. The newspaper people got it right way back.
- Don't try to put too much on the page. A page full of 10 point text with narrow margins looks cluttered and is very hard to read. Proper use of white space in printed documentation is vital to comfortable reading.
- Don't get carried away with colours. The most readable page is white with black lettering; any other combination is likely to induce vertigo.

Fundamental ingredients that cannot be covered in this article are the proper use of language and writing style to focus attention and enhance comprehension.

The payoff

Does this all sound a bit daunting? The process of designing and developing good documentation is complex and can involve significant costs. But in the end good documentation doesn't cost, it pays. It often spells the difference between a capable, confident staff member who gets the most out of your processes, and a wary, unsure one, who may make mistakes.

The TOPIC approach

A good methodology when writing any performance-support document is to use the TOPIC acronym:

Target: identify the audience and what they will require from the document.

Organise: gather details about each topic, and plan how it will be written.

Phrase: write the material in the most direct and appropriate language for the task.

Illustrate: develop the diagrams, forms, checklists and so on.

Check: use the review process planned and get the document approved.

In summary, to write well you need to understand whom you are talking to, and identify the structure, language and images that will best communicate with them. Then you need to confirm you have got it right.è

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