

Procedure Writing

Virtual Twelve hours

As business grows more complex, the processes that support it become equally complex. When processes are either undocumented or when procedures are poorly written, your organization cannot confidently maintain the quality your clients or regulators require. On the other hand, when procedures are clear and easy to follow, you can be confident anyone can perform them consistently.

This course helps you write and edit user-friendly procedures that lead to higher quality, fewer errors and greater compliance with regulatory bodies.

Who should attend

This course is for anyone who writes or edits procedures in administrative, technical or scientific environments.

We suggest 15 participants to allow for individual coaching.

You learn to

- use a consistent process and framework to quickly generate and organize content
- analyze and meet end-user needs
- clarify the objective of each procedure
- write clear, easy-to-follow steps using an action-oriented style
- choose the best format and layout so users grasp concepts quickly
- test your procedures to ensure users can follow them correctly and easily
- edit and proofread to ensure there is no ambiguity
- incorporate visuals into the text of your procedures

What to expect

We know that people learn best by doing, so this virtual course gives you many opportunities to practice as you learn. You participate in large- and small-group discussions and receive coaching from your peers and the facilitator. This course combines self-directed and virtual learning with a workshoping session. The facilitator is available to answer questions and provide guidance and coaching during the self-directed learning portions. You use your own documents to assess your writing as we go, and you have an opportunity to revise your procedural document in a culminating activity.

You receive a comprehensive digital manual containing exercises to provide practice, checklists, templates, and examples. You also have access to online resources for post-course use.

How you spend your time

Virtual Procedure Writing includes the following activities in three-hour learning modules, which we can schedule at your convenience.

Module 1

Virtual Session 1: Write the first draft (90 minutes)

You receive your course materials before we meet. We discuss these materials, which guide you through steps to create a first draft of your document. These materials show you how to:

- analyze your reader's needs and clarify your purpose
- plan your content—quickly generate and organize your ideas
- draft quickly and painlessly

Self-directed learning (90 minutes)

Prepare a draft document of your choice to bring to Session 2.

Module 2

Virtual Session 2: Revise for structure (90 minutes)

Bring your draft and any other procedures you've written that you want to review. In a highly interactive virtual session, learn to:

- use the 4 Cs template to quickly structure your document
- put your main point up front and make your document easy to scan
- streamline your approach with format templates
- use visuals to simplify and clarify directions

Self-directed learning (90 minutes)

Revise for structure. Test with a trusted user to ensure clarity.

Module 3

Virtual Session 3: Revise for style (90 minutes)

Bring your draft and any other procedures you've written that you want to review. In a highly interactive virtual session, learn to:

- energize your writing by using a clear, concise style
- use a positive tone to build and maintain good relationships
- fix the grammar mistakes good writers make

Self-directed learning (90 minutes)

Revise for style and refine your document based on test feedback.

Module 4

Virtual Session 4: Prepare to workshop your document (30 minutes)

Share insights, challenges and successes. Get tips on how to provide actionable feedback to your peers.

Self-directed learning (60 minutes)

Meet briefly in breakout rooms with your small group to exchange your revised documents and provide context. Leave the breakout room to individually review your peers' documents and get ready to give thoughtful, actionable feedback.

Virtual Session 5: Workshop (90 minutes)

Workshop your documents with your small group in a breakout room. Give and receive feedback.