# POLICIES & PROCEDURES MANUALS

# 1. THE KICKOFF MEETING

# PREPARE FOR KICKOFF


- When a client comes to us for help in drafting a policies-and-procedures (P&P) manual, you might be asked to contribute to the process. The process begins with a project kickoff meeting.
- Before the day of the meeting, take a look at the client's online presence. Your budget will include time to learn about their purpose, priorities, and the field in which they operate. It'll also help you adapt the agenda template you'll use to guide you through the meeting.
- But let's back up. Why do we have kickoff meetings, and what do they look like?

# WHAT TO EXPECT

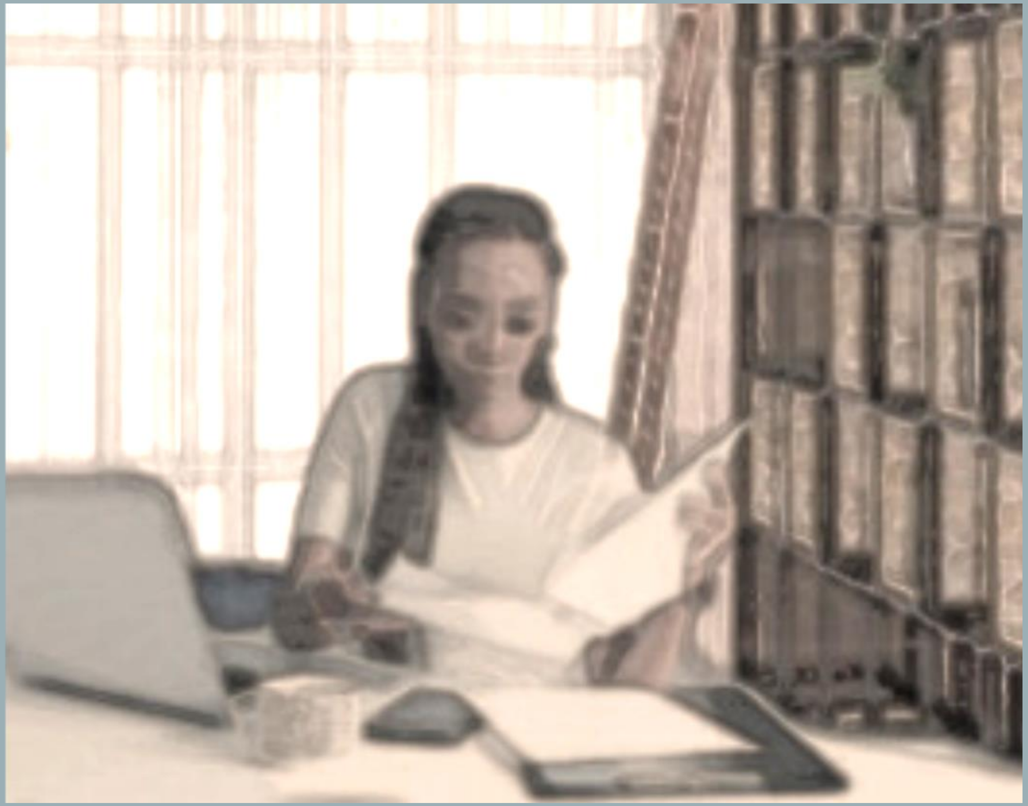
- A kickoff meeting allows you to gather and reinforce information about what your client will accomplish by having a professionally written P&P manual. The meeting also serves as both a launch pad and a tool for generating and organizing information so that you can deliver an effective, adaptable document.
- Generally our kickoff team consists of a project lead who will also be the lead writer and an assistant to capture meeting notes and client questions—and occasionally to look up information needed by meeting participants. Often the assistant will provide editing support after the kickoff.
- Remind the client that the final P&P manual should be reviewed by a practicing attorney; your support does *not* constitute legal advice.
- Following the meeting, you will prepare a kickoff report with an executive summary of key P&P covered, content-development expectations, and project scheduling; after signoff of those project plans, you'll begin drafting the manual. Check in with the Sandstone Editing project manager (PM) for the amount of time you'll be allotted to write the report.

# WHY DO WE NEED A KICKOFF MEETING?

- To gather information about the client's goals, objectives, available resources, deadlines, and internal document owners and availability for taking questions.
- To establish protocols for effective communication between our team and theirs, agreeing on scheduling processes, applications and naming conventions for data storage and management, and review and revision expectations.
- To address client questions about our team, our role in the drafting and review processes, and our deliverables.
- To make a great first impression and build rapport with each project leader, contributor, or subject-matter expert (SME) at the meeting.

# BEFORE YOU GO

## TAKE A PRELIMINARY DEEP DIVE



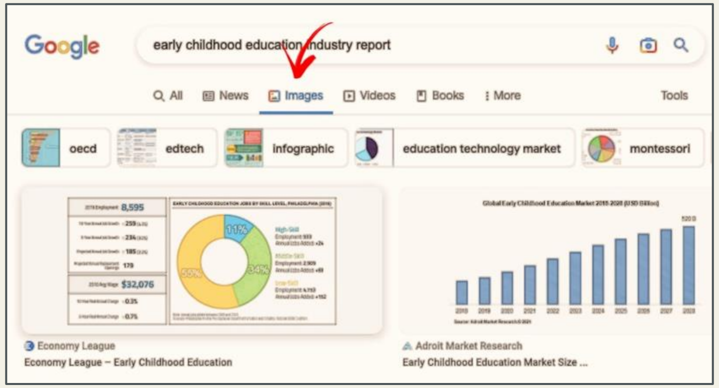
You'll likely get a brief telling you what you need to know about the client. If not, you'll be allotted a timeframe to learn more about them.

In this case, create a Word document to collect highlights from the client's website and contextualizing content from external pages (with links). If you're the team lead, share it with your assistant so they can search the document for information if needed.

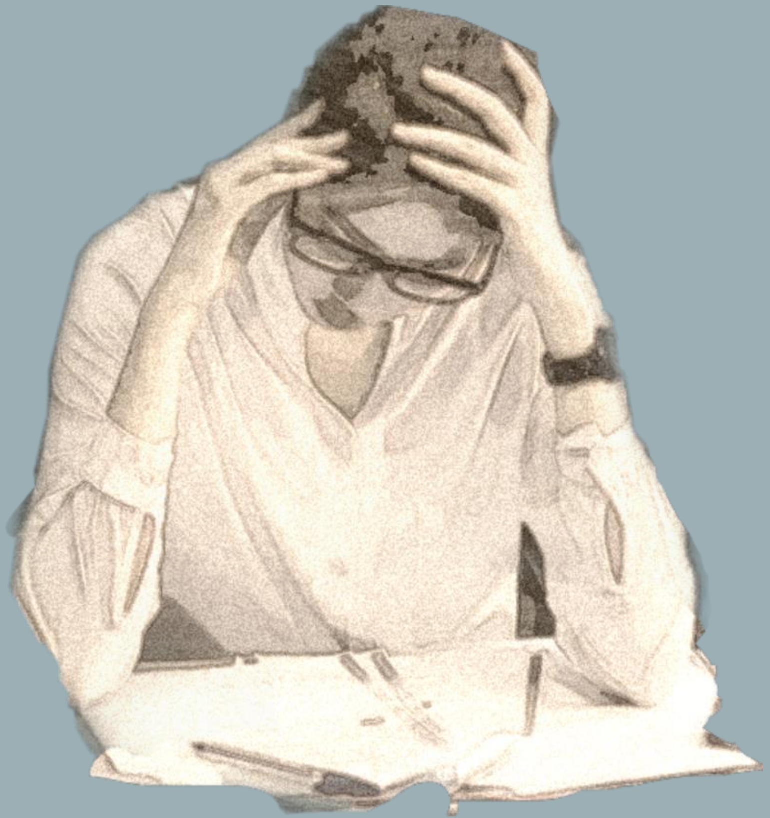
This document needn't look pretty; it's just a personal, searchable data mine to retrace your findings. Using a header styles for main topics to create a table of contents helps you navigate the document more easily, however.

# A FEW TIPS FOR THE DEEP-DIVE DOCUMENT

- Search and copy key words and concepts you find on their site and be sure you know what they mean.
- Browse competitor pages and capture URLs. If you don't know who competitors are, search keywords from client pages.
- Skim industry trends and customer demographic data on Google images, like this:



## AND MAKE SURE YOU CAN IDENTIFY A POLICY FROM A PROCEDURE!



- **Policies** are rules that indicate the general mission and vision of the company and are determined only by top executives.

  Policies usually align with studied business principles and are often based in management theory and proven best practices.

- **Procedures** are step-by-step instructions for how work is accomplished in compliance with those policies. Let's discuss this in more detail.

# WHAT MUST P&P MANUALS ACCOMPLISH?

- P&P manuals describes what need to be done in line with employee roles and how to do it in compliance with internal and external (governmental) policies.
- They're designed to indicate the company's direction and to protect the organization, employees, and customers from detrimental effects of non-compliant and inconsistent workplace conditions, quality-control measures, customer interactions, internal workflows, etc.
- They clarify organizational and departmental expectations and internal offerings, roles and responsibilities, and mitigation techniques for any problems that arise; i.e., they provide a foundation for management and for other employees to better understand what they're accountable for.
- Each team member must be able to locate and follow standalone instructions for all tasks defined for *each* of their roles within the organization (most will have multiple roles).

# WHAT DOES A P&P MANUAL USUALLY INCLUDE?

The report will also prompt questions for interactions with subject-matter experts (SMEs) as the future draft manual evolves to include these elements:

- The vision, mission, and core values of the business and its organizational culture
- Employment policies, including details about employee health benefits, sick days, and vacation days
- Training for each role and task within the organization
- Payment procedures
- Harassment and discrimination guidelines
- Workplace codes of conduct
- Technology usage policies
- Expense and travel reimbursement policies

# OTHER INCLUSIONS

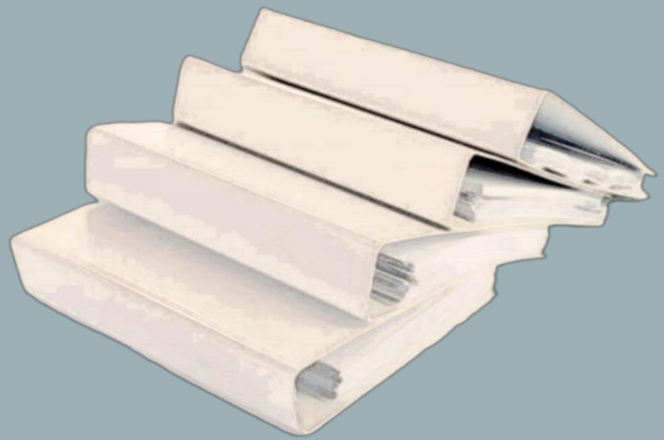
The manual will contain the following elements as well:

- Front (table of contents) and back (indices) matter that make searching the document easy, as well as links to relevant references for continued self-study
- A detailed standalone description for each policy and procedure and tools for cross-referencing
- Examples for clarification and real-world applications (especially when a draft review indicates confusion)
- Mitigation recommendations for problems that arise among users of the guide
- Any additional material requested by the client and agreed upon by Sandstone Editing and the client, such as supporting graphics and job aids

## A FEW THINGS TO REMEMBER

CLARITY → COMPLIANCE;

AMBIGUITY → ATTORNEY FEES



- You'll draft detailed step-by-step procedural instructions in language that the least educated and/or least experienced new hire can understand. Employees can't follow instructions they don't understand.
- Tie tasks to each role, not to a given individual or position, as roles may shift among employees as the company grows or needs regarding work load arise.
- Address the frequency with which each task should occur, as well as the consequences and stakes of failure to complete tasks appropriately and on time and in alignment with policies.
- Multiple copies of the draft document should be distributed by the client to collect feedback from varied perspectives.

# HOW WILL YOU CONDUCT THE MEETING?

1. Begin introductions using job aids you'll receive and review before the meeting.
2. Offer an overview of shared purpose and agenda items.
3. Actively listen to the project team, clarifying key points to ensure you've understood.
4. Define the goals as you perceive them and ask to be corrected regarding any misunderstandings.
5. Sketch out a project logic model (a job aid with instructions will be sent to you), aligning resources and activities with deliverables for measurable outcomes.
6. Outline the responsibilities and contact information for all team members.
7. Drive consensus about next steps with incremental deadlines.
8. Review your notes and reiterate next steps; invite questions, then close the meeting.

# FIRST THINGS FIRST: WHAT DOES THE ORGANIZATION DO & HOW DO THEY WANT WORK DONE?

- Following meeting-participant introductions, ask the client to describe what it is that they do, as if to a person with no prior knowledge about their organization.
- Be sure the client understands that you've come prepared with an understanding of their mission, vision, and products and/or services, but that you'd like to begin without preconceptions.
- Now *briefly* tie each offering or service provided by the client to how they wants the work to be done.
  - Use a whiteboard or flipchart to be sure you've captured and condensed the client's words correctly.
  - At this point, you're looking for a general overview of policies and procedures, and the spatial limitation of a whiteboard or flipchart should reinforce your verbal messaging to this effect.

# CAPTURE DETAILED INFORMATION

Discuss and document the policies and procedures that will be included, as well as contact information for the individuals within the organization who ”own” particular areas of information relative to each P&P section.

You’ll need enough detail to write a kickoff report that will demonstrate to the client that you understand their needs. The kickoff report also provides a basis for the general direction of the project and makes sure roles are clear and team members are accountable.

Finally, the report will define turnaround times for feedback, deliverables, and client sign-offs, as well as a system for file and asset management and documentation of changes and emerging needs.

# LIST MACHINERY & TECHNOLOGY INSTRUCTION THAT MUST BE INCLUDED

- Prepare operational and procedural detail for using any equipment necessary. These may be included in the task description or indices referred to in the description.
- Be sure instructions ensure the users' safety and well-being, as well as improving their performance and productivity.
- Some clients request manufacturers' documentation to be included in the indices; others simply reference where within their libraries of documentation those assets can be found.

# DESIGN A ROLL-OUT SCHEDULE

You'll want to gather information about scheduling requests from the client during the kickoff meeting. You will work with your project manager at Sandstone Editing to finalize timeframes. To fully and successfully implement the policy-and-procedures guidelines, you'll want discuss time periods for the following actions:

- Collecting feedback from various stakeholders and employees
- Making changes to the draft P&P manual
- Assessing the effectiveness of the manual
- Training employees on use of the manual and the content within it

# RECOMMEND AN ANNUAL REVIEW

Whether or not the client intends to request our continued involvement in the evolution of their P&P manual, you should recommend a P&P review at least annually for the following:

- Adjusting to changes in social attitudes; e.g., implementing practices for fostering inclusivity
- Adapting to changing state and federal policies and laws
- Addressing reported misunderstandings and conflicts
- Facilitating organization growth and changes in management approaches
- Incorporating new primary and secondary opinions and evidence in the studies of science and productivity, emerging market opportunities, etc.

# REITERATE NEXT STEPS & CLOSE THE MEETING

Represent Yourself and Sandstone Editing with Care and Professionalism

- Don't forget your underlying purpose in facilitating a successful meeting and writing the kickoff report: You need to demonstrate how we can improve their workforce's performance and compliance with company policies, thus facilitating the development and growth they're looking for.
- Reiterate next steps, including whom we'll be reaching out to with the kickoff report, as well as who will deliver the report to them and when.
- Let the client know that their trust is important to us, and that we intend to deliver timely, quality work.
- When you're finished with the report, we'll review it internally, then you'll submit it to the client for review and corrections, adjust the report, and obtain their project manager's signoff before moving forward with the project.