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How to create your own office procedures manual template

When you're creating a template, you may want to first think about what information is most important to the reader. You should communicate why the process is required, everyone that's involved, the steps needed and how often it's required. Keep in mind all the following:

Whether the information will be relevant in the future

Templates are most effective when they're evergreen. This means the manual won't need to be updated routinely in order to ensure everyone's up to speed on the latest company changes. For example, instead of directing someone to a specific person, state the person's title so that if that manager departs your company, employees know to speak with the new person filling that role.

Whether the information is scannable

Time spent trying to locate the information someone needs amounts to lost productivity. There are a few ways to make your manuals more scannable. You can include a table of contents in a printed copy or issue the manual as a searchable PDF file.

Whether the procedures are flexible

Providing a certain level of autonomy allows employees to use creative solutions to problems as long as they adhere to core principles. If you're too rigid with expectations, it could actually make it more difficult for your team members to follow protocol.

Whether the information is comprehensible

Use clear and concise language to communicate your wishes. Avoid rambling or including any information that deviates from the point you're trying to make. The most effective guides are simple and written in layman's terms.

Whether you've included an organizational chart in the manual

Make sure everyone knows who to report to and collaborate with. This is even more important for tasks that require cooperation among departments. When people don't know who's in charge, it can lead to chaos and confusion.

Whether you've set clear enough expectations

Some things you may wish to consider are the amount of time it should take to complete a task, the review process, how frequently the task needs to be completed and who receives the completed work.

Whether the information is outlined
An outline makes it easier to scan the document and offers a checklist your employees can complete. In addition to including an outline, you may wish to use headings and bullet points for the same reason.

Whether you're communicating policies or procedures
[Policies and procedures] are similar but different concepts. A procedure manual should focus on how you wish for tasks to be completed, so try not to include too much on company policy in your manual. There may be a few areas where the two concepts overlap, but the procedure manual should focus on how things should be done.

Whether you've included information regarding manual updates
While you do want to keep things evergreen wherever possible, it's inevitable that your manual will need to be amended at some point. Decide how frequently you're going to issue these updates and make that clear so employees know when to expect the latest update. Each time you update your manual, provide the date it was issued and who composed it.

Procedures manual template
Here is an example of a template you can use that is easy to fill in with information that applies to different positions and scenarios:

- Task or duty
- How long it should take
- Departments overseeing the task
- Which roles contribute to the task
- Why the task is important
- How often the task is completed
- Steps for completing the task
- Task result or delivered product

Using the above format, you could create the following entry into a workplace procedures manual:

Inventory

- Should take 12 hours to complete
- Overseen by Business Manager
- Coordinated between the inventory management department, purchasing department and shipping department

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- Inventory management is important because it ensures that our company has enough product to meet customer demand, the products we carry reflect customers' preferences and purchase rates and we have proper lead times for receiving new inventory
- Should be performed monthly
- Follow these steps:
  - Receive counts on all products held in inventory
  - Record total product inventory
  - Record inventories of specific products
  - Decide which items need to be restocked
  - Order new inventory
- The task is completed once the new product arrives and is entered into inventory

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