

HOW TO: DEFINE A PROCESS

(See www.mandossoftware.com for details of how AUTHOR can help)

PREPARATION

First of all, identify the process – what starts it, where does it end, what is its objective?

Be clear why you are defining the process - who will use the definition, and for what?

Get the level of detail right - a reader should be able to scan and understand a process definition in, say, 30 seconds. This usually means no more than 2-3 pages of A4.

Assume competence in the user - if they are not competent, train them.

Be consistent - apply a few basic standards and simple conventions, and stick to them.

Remember that a process definition is not (just) a flowchart. Also consider:

- referenced documents and records
- resource requirements including skills and knowledge
- influences such as performance standards, risks.

DETAIL

Be concise - use active verb / noun format for the Task Title. Additional description can be added as a Task Description if necessary - or you can refer to a reference document (eg a Work Instruction) and/or a sub-process.

Identify who is involved (job functions, not individuals).

Allocate only one "Responsible" role per task. Others may Assist (perhaps as delegates), be Consulted and be Informed.

Concentrate on the normal flow - start by defining the process as it normally happens, or should happen.

If possible, avoid "decisions" - ie branches and loopbacks. You can often build an alternative action/route into the Task Description, or even define a Task Title as "If xxx do yyy" (if it is not "xxx", a "normal" reader will ignore the task). But you can always define "branch tos" (decisions) if needed.

Avoid long Task Titles - use " - " to continue a sentence across to the Task Description.

Avoid repetition in the Task Description of: i) text from the Task Title, ii) Roles already identified in the column headings, iii) reference to documents which will be in the Document Register and which will be referred to by hyperlink.

Use "Header" tasks (in UPPER CASE) to identify stages in a process (if relevant).

Use " - " for list items in a Task Description.

Be consistent with punctuation - (eg) no full stops in Task Titles / full stop at end of sentences in Task Descriptions.