Document Development Service WI

# OBJECTIVE

As part of BE’s Document Development Service, BE will work with teams to develop helpful guidance documents for new and important processes. This document provides guidance on developing Work Instructions.

# SCOPE

Use this document as guidance when developing specific, detailed Work Instructions. For general guidance, describing a simple standard for getting something done, a Standard Operating Procedure (SOP) document may suffice. (For reference, SOPs can be just a few procedures. Work Instructions, are often, though not always, more detailed, with more steps and procedures – sometimes several dozen. We include below, along with templates, examples of both for reference.)

# TERMS & DEFINITIONS[[1]](#footnote-1)

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| **Term** | **Definition** |
| Process | A high-level, strategic method; a summary of objectives, specifications, and broad resources |
| Procedure (e.g., SOPs) | A more specific description with specifics such as responsibilities, tools, methods, and measurement. |
| Work Instructions | A step-by-step guideline to implement the process and procedure, often segmented… to focus those who are doing the actual work. |

# RESPONSIBILITIES

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| **Stakeholder** | **Description/Role/Expectations** |
| Technical Writer, BE Document Review team | SME for Document Development Service and process; provides guidance and reviews; provides requestor with dedicated intake meeting and follow-up sessions to:   * + Help craft the content   + Provide education around SOPs, WIs, best practices, tips/tricks, and other insights to empower requestor to create these docs on their own moving forward   + Resources that requester can utilize / reference in the future     - * One-pager with doc type-specific best practices       * Link to our content templates in SharePoint |
| Customer | Can come from any team within Global Product Security; comes to BE with:   * + A sense of content, scope, and intent for the document   + An understanding of the document’s audience   + Impacted/involved process knowledge as it pertains to the document   + Information outside of BE scope including stakeholders, cross-functional employees that may be involved, and applicable Roles and Responsibilities, etc. |
| S3 | Will provide compliance and content review and assist with uncovering, identifying, and mitigating any security risks. |

# WORK INSTRUCTIONS

These Instructions have been modified from BE’s general Document Development Service workflow.

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| **Step** | **Instruction** |
| 1 | Requestor completes Document Development Questionnaire. |
| 2 | BE works with the requestor via initial intake meeting and additional follow-ups (dependent upon the request and the requestor). |
| 3 | BE (or the requestor, if preferred) drafts the document. BE follows up with the requestor for additional details and determines if leadership review will be necessary (e.g., for higher-profile SOPs and documents). |
| 4 | BE performs the initial review for clarity, format, and grammar. |
| 5 | BE engages with S3 for compliance and content review and asks if they wish to participate in the final review/approval process in PowerDMS (PDMS). S3 inclusion will be automatic if they provide content at this step, but optional if they do not. |
| 6 | BE schedules and leads a content review meeting with SMEs, S3, and BE Technical Writer. |
| 7 | BE, in collaboration with requestor, performs any necessary updates to the draft and performs any additional technical review. |
| 8 | If additional (leadership) review is needed, BE works with the Head of Pillar to ensure all reviews are completed. If leadership reviews and requests (or makes) changes, BE informs all stakeholders of the changes, and oversees any additional review, or discussion, if needed. |
| 9 | BE uploads draft to PDMS and includes the requestor in PDMS approval workflow, along with the requestor’s Program Manager and appropriate Pillar leadership, as well as any applicable S3 team members (if desired). |
| 10 | BE schedules Document Delivery sync with requestor and BE Content Strategist for review and any potential socialization or marketing opportunities for the completed content. |
| 11 | BE publishes the finished document on the appropriate platform(s). |

# SUPPORTING FORMS & DOCUMENTATION

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| **Form/Item** | **Description** |
| Asana Questionnaire – Document Development Service | Gathers information for Document Development Service |
| Template – Work Instructions | For use in developing Work Instructions, and for reference |
| Sample Work Instructions Document:  WI: OOO and Travel Logistics | For reference |
| Sample SOP Document:  Global Product Security Secure Moves Program | For reference |
| Template – SOPs | For use in developing SOPs, and for reference |
| Additional Samples | Guidelines: Guidelines and Best Practices  Playbook: GPS Ops Hub Playbook  Checklist: Truck and Container Inspection Checklist |

# Best Practices:

* + For writing individual steps, think of each step in terms of a verb: what are we doing at each step?
  + Describe steps and procedures from the point of view of the person who will perform the steps.
  + Keep it brief (essentials only) and remove unnecessary detail. If the document is too long, people will get lost, or won’t bother reading it.
  + Similarly, keep individual steps brief: a bulleted or numbered list makes it easier to parse individual steps. Avoid dense paragraphs. If the text looks like a Terms of Use agreement, do not expect people to read it.
  + For important or essential steps use clear language to avoid ambiguity. For example, “shall” is clearer than “should,” and much clearer than “may.” “Should” leaves room for the user to find reasons not to do something; “shall/must” does not.
  + Likewise, use specific rather than general language. If something must happen daily, nightly, or at precise intervals, say so. Writing “regularly,” “periodically,” or “generally” leaves it up to the user to decide when to do an action. This might be appropriate for some situations, but not for essential time-dependent steps.
  + For awareness, you can highlight important things that the user should know as a warning and include these before the step which requires this knowledge or awareness. Warnings should include knowledge, not actions. Actions are the steps or procedures themselves.
  + See above, Supporting Documentation, for an example of Work Instructions.

# Revision History

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| --- | --- | --- | --- |
| **Version** | **Date** | **Update** | **Reviewer** |
| 0.8 | 3/7/22 | Content Strategy Added | Global Product Security |
| 0.7 | 3/2/22 | Updates – Workflow added | Global Product Security |
| 0.6 | 2/23/22 | Updates | Global Product Security |
| 0.5 | 1/31/22 | Initial Version | Global Product Security |

1. Source: https://the9000store.com/iso-9001-2015-requirements/iso-9001-2015-context-of-the-organization/processes-procedures-work-instructions/ [↑](#footnote-ref-1)