



DOCUMENTATION

TOPICS

What is it?

What types are there?

Why does it matter?

What is the process?

What are my obligations?

What do I get?

Frequently Asked Questions

WHAT IS DOCUMENTATION?

Documentation is:

Step-by-step “how-to’s” to enable associates to learn programs, standardize processes and find important information.

○ TYPES OF DOCUMENTATION

Reference Documents and Guides -

Who we are, what we do, basic information

Software Documentation -

How does that program work? What does this button do? Where do I find this information?

Standard Operating Procedures (SOPs) -

Step-by-step guides on how to do a process. These include:

- General process (many people do this task for many clients)
- Client specific (a client requires special handling and can't be processed just by following the general procedure)

WHY IS
DOCUMENTATION
IMPORTANT?

WHY DOES IT MATTER?

Documentation:

- Helps us understand the importance of the work we do!
- Helps with new hire training and cross training
- Offers clarity in job expectations and duties
- Reduces errors and associated risks and allows for quality control measures
- Standardizes processes and allows for consistent work products
- Allows for backup support
- Encourages knowledge sharing

Documentation
makes your work
easier!!

WHAT IS THE
DOCUMENTATION
PROCESS?

DOCUMENTATION CYCLE

1. SME Outline
2. Documentation Request
3. Prioritization
4. Meeting between SME and DS
5. DS creates documentation
6. SME review
7. Manager Review
8. Updates
9. Final approval
10. Publication
11. Semiannual review and/or Document Update Requests
12. **USE THE DOCUMENTS!!!**

OUTLINE

The Subject Matter Expert (SME) creates a basic outline.

This should also include:

- What is the purpose of this document
- What is the value of this process
- What programs are used
- Where are all associated files located
- Examples of emails and spreadsheets used
- An outline of the steps taken



REQUEST AND PRIORITIZATION

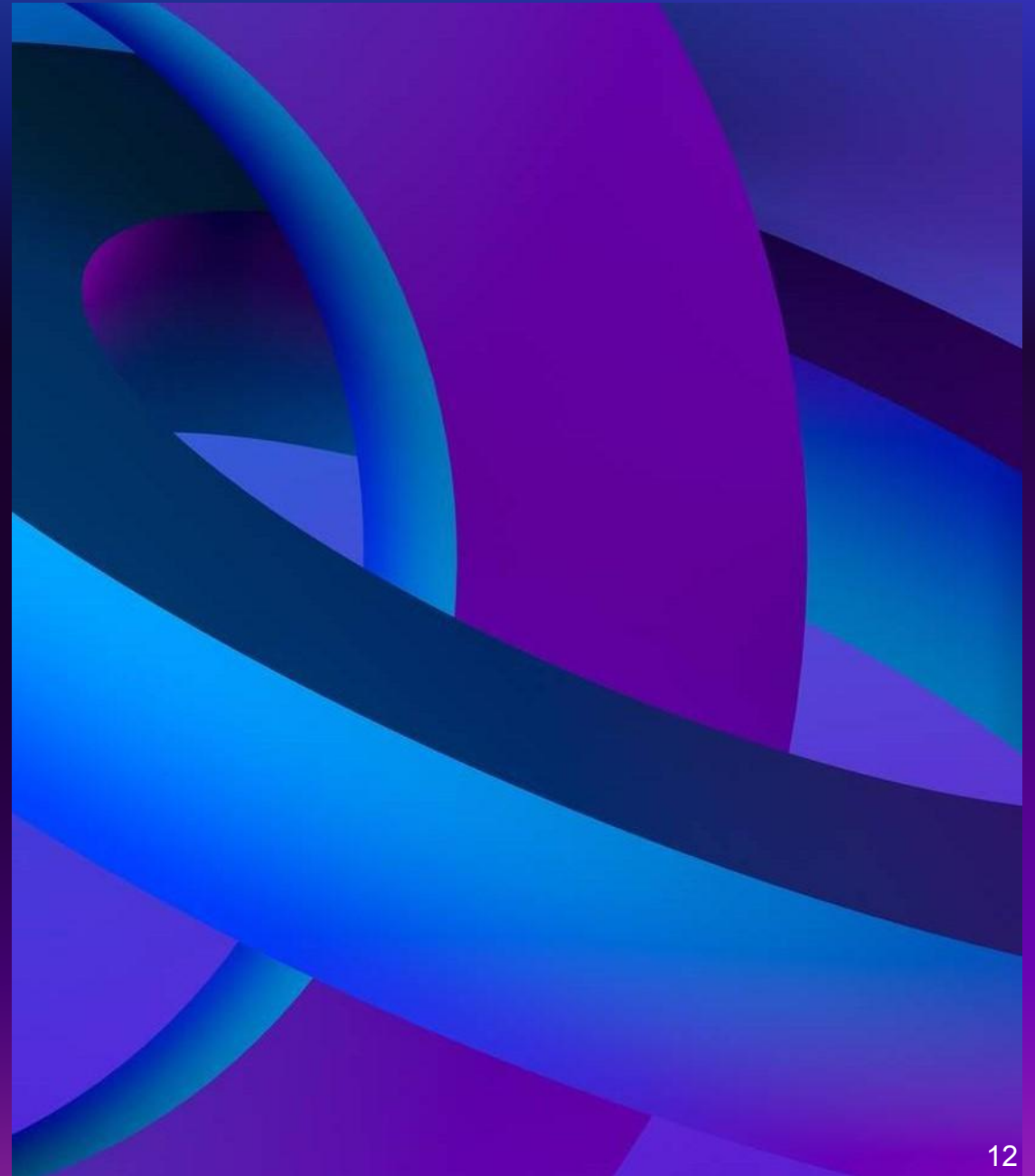
The Documentation Request Form is submitted by a Manager or Supervisor

Managers and Directors meet across all associated business units to prioritize all submitted requests

SME MEETINGS

The Documentation Specialist (DS) reviews the outline and schedules time to meet with the SME to get an overview

Time is scheduled for a recorded video call for the SME to walk through the process on screen with the DS



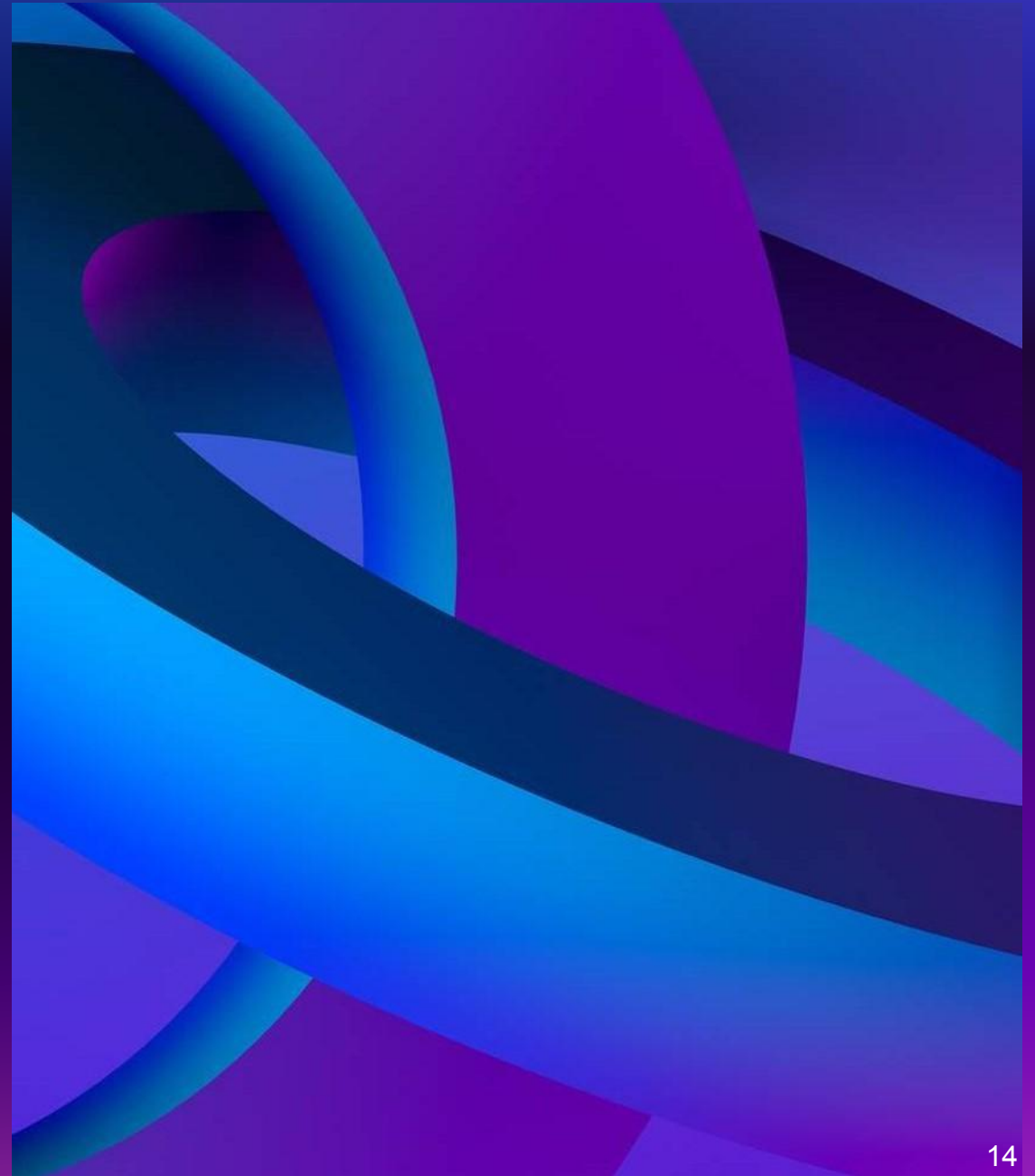


DOCUMENT CREATION AND REVIEW

- The DS creates the documentation, reaching out to the SME with questions
- Once completed, the SME reviews the documentation
- Ideally, a backup associate walks through the process to find any missing information
- It is then reviewed by their manager

PUBLICATION

The document is finalized and published on the Documentation SharePoint site and links are added to associate/business unit checklists for ease of access





REVIEW AND UPDATES

The documents are reviewed regularly to determine if additional changes need to be made

If changes need to be made outside of the review cycle, a Documentation Update Request can be submitted

WHAT ARE MY OBLIGATIONS?

SME OBLIGATIONS

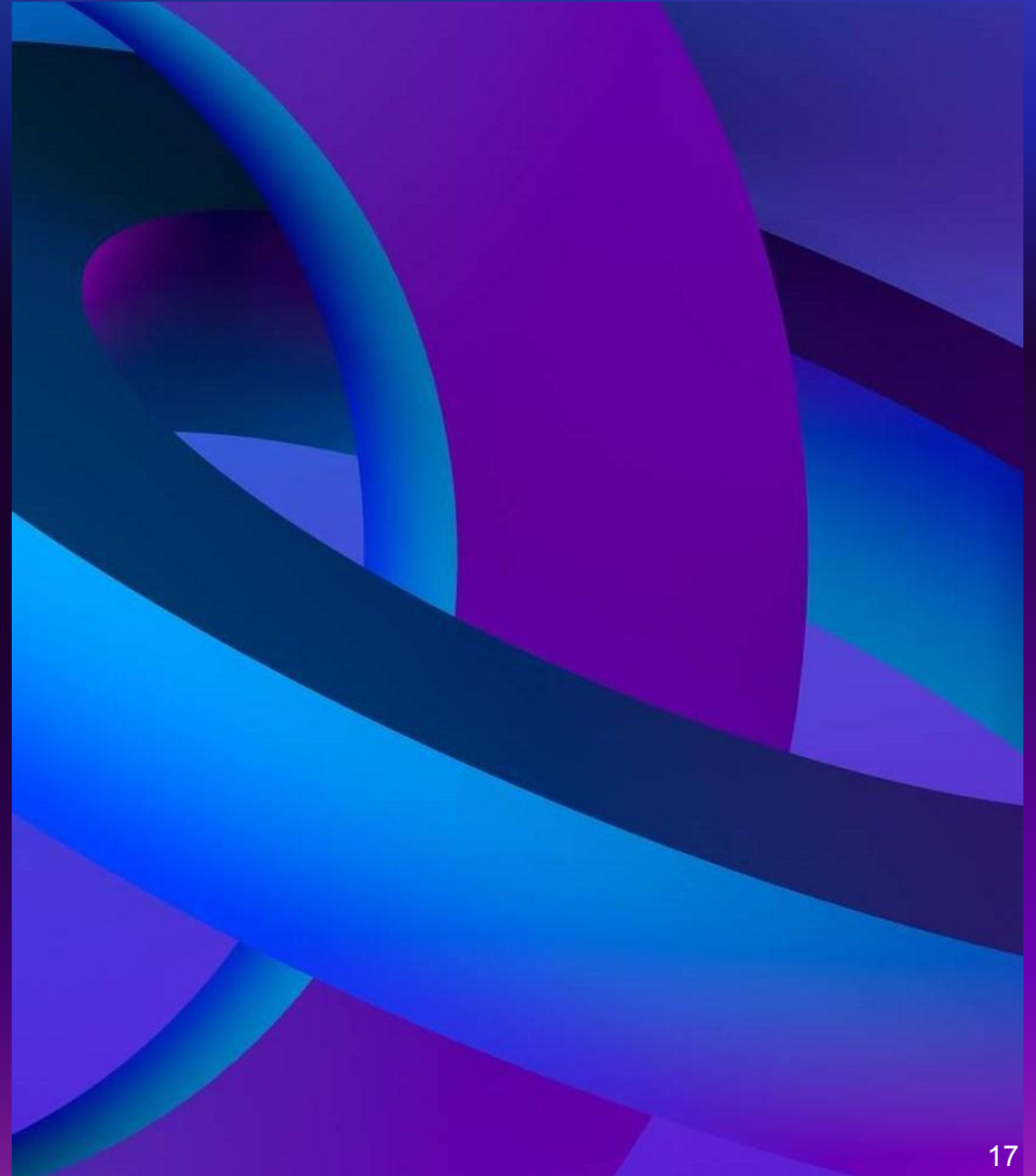
Understand the process that is being documented
– You're the expert!

Create a basic outline

Meet with the documentation specialist as
scheduled

Reply to questions and requests in a timely
manner

Review the completed document





MANAGER OBLIGATIONS

Submit the documentation request

Work with other managers/directors to ensure document requests are prioritized appropriately

Ensure the SME has time/space to meet with the documentation specialist

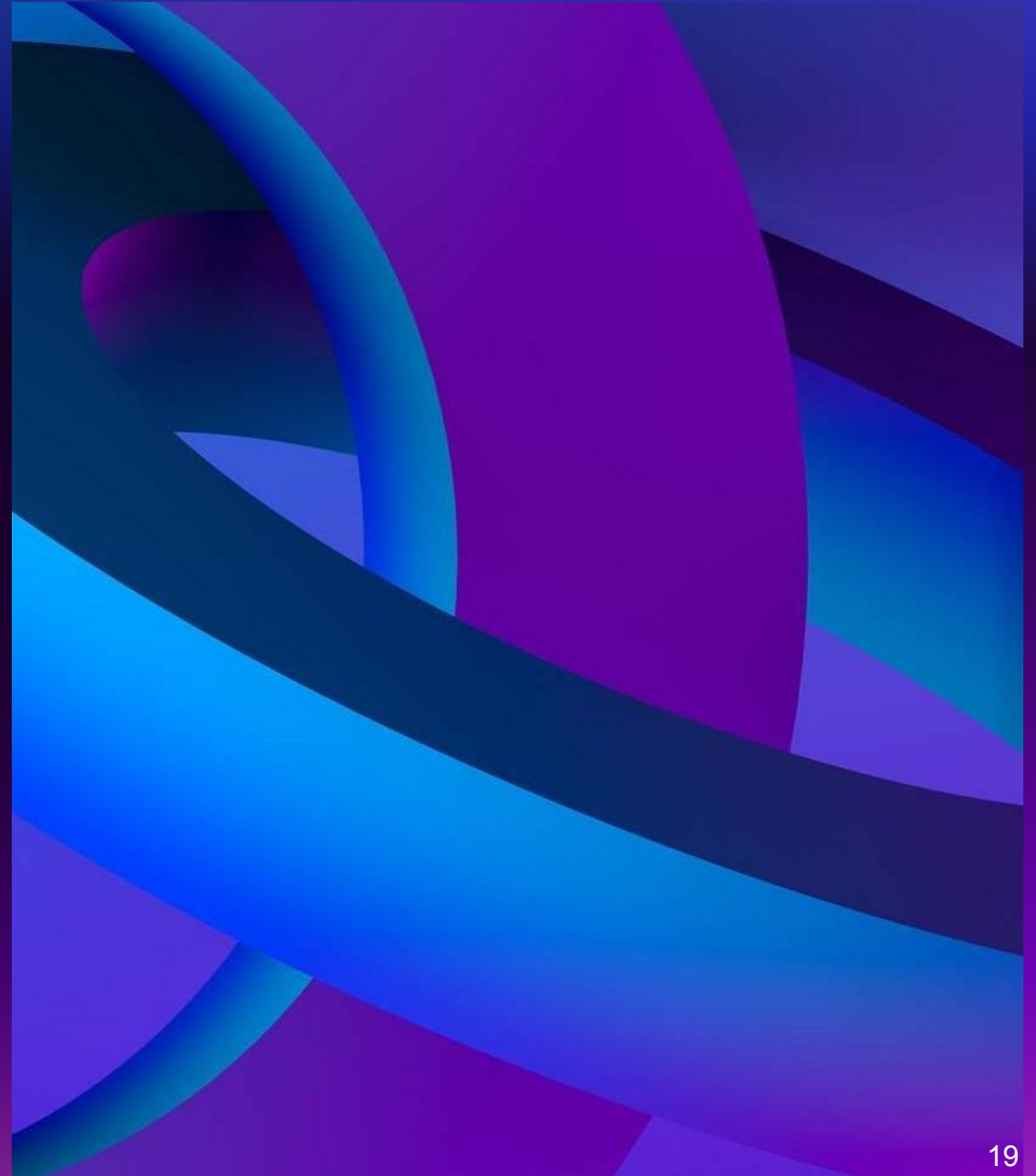
Setup review with a backup associate

Review documentation

Train, utilizing published documentation and ensure associates have ready access to the Documentation SharePoint site

DS OBLIGATIONS

- Keep Documentation Timeline updated
- Meet with management weekly to discuss progress
- Review SOPs and Documentation Requests
- Meet with SMEs and record walk-throughs
- Create documentation utilizing standardized templates
- Ask questions and adjust documentation from feedback
- Publish documentation
- Manage Information Architecture for SharePoint site
- Documentation management



WHAT DO I
GET?



GOALS FOR DOCUMENTS

The goal of informational documentation is to provide associates with necessary information in an easily accessible manner, to be able to answer questions and find solutions for themselves and clients.

The goal of software documentation is to allow users to more fully understand the programs they are using, know how to access necessary information and where processes take place.

The goal of SOP documentation is to allow anyone with the proper access to be able to walk, step-by-step, through a process and end up with the correct results.

All documents should be beneficial and easy to use, both for new hires, as well as the most seasoned associate.

FREQUENTLY ASKED QUESTIONS: SME

What if I make mistakes? What if the process needs to be updated?

We all do! If you notice them, we'll correct them. If management notices them, we'll correct them. Ain't no thang but a chicken wing! Having a foundational document is better than no document! If we need to update the process, we can do that as we go or we can come back and redo the document after the process is updated.

How detailed does the outline have to be?

Start with what ya got! Something is better than nothing, more is better than less. But we'll walk through the process and if something isn't clear, I'll ask some questions.

But the process is so easy, why do we need to bother documenting it?

The process is easy *for you* because you've done it a dozen times (and we know, you're just that smart!). It won't be easy for someone learning it for the first time. The more processes we have documented, the better training we can offer and the more consistent we will be while doing those processes.

But Aria is scary and weird and I don't wanna work with her!

Completely understandable, but I'll try my absolute best to be nice, I promise!

But so far, I'm the only one creating the documents, so you don't get a choice.

Unless you wanna do it! Then, by all means! Let me know and we'll see if we can get you set up to start doing documentation!

FREQUENTLY ASKED QUESTIONS: MANAGER

What are the first priorities?

Single points of failure!

Is someone leaving? Let's get the documentation done well before they leave! I'm happy to sit in on training or simply record them all so that the processes can be documented afterwards. I don't have to interrupt, I'll be a fly on the wall. But it's better to have those recordings than nothing!

Is there a desk or a process that only one person knows? Document the heck out of that!!

Is there a process that affects millions of dollars in revenues? Wouldn't that be a good one to document to ensure it is handled correctly?

Are there processes that lots of associates do? Maybe some documentation could standardize the process and ease new hire training!

Are there processes that need to be improved? Walking through it to document it can often point to areas of improvement.

THANK YOU

Questions, comments or concerns?

Contact:

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See also:

[Documentation SharePoint](#)