

# Documentation Guidelines/Playbook

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## Purpose

Documentation guidelines create uniformity within the company. It creates consistency in processes and standardizes procedures. It promotes knowledge sharing: helping the team understand how processes work and making sure they are updated, keeping everyone on the same page.

Expecting a particular format when viewing our documentation can ensure safer practices internally and externally, adding an extra layer of trust and recognition.

Developing effective documentation is an evolutionary process, and that process is collaborative.

This playbook is for guiding the process of maintaining documentation policy and procedures.

## Designated Contributors

- *Writers* (usually subject matter experts)
- *Editors* (for clarity and consistency)
- *Maintainers* (to keep it current)

## ROLES AND RESPONSIBILITIES

A Role and Responsibilities Matrix will clearly define who is responsible for which role and processes. Interviews will be conducted with designated members from each department for a documentation audit and SME interviews.

Role	Responsibilities
Sales	•
Business Development	•
Implementation	
Operations	•
Integrations	•
Data Science	•
Product/Engineering	•
HR	•
Finance	•

## Documentation Methodology

### *Readability*

- Use readability scores like Flesch-Kincaid to ensure clear, concise language
- Improve readability by using simple words, short sentences, and organized content

### *Navigation and Accessibility*

- Ensure documentation is easily accessible and navigable
- Use clear headings, links, and searchable content
- Test with screen readers and keyboard navigation

### *Content Quality*

- Focus on accuracy, completeness, relevance, and clarity of information
- Provide up-to-date, well-researched, and consistent content
- Align with user needs and expectations

### *Usability*

- Measure task completion time, error rate, and user satisfaction
- Conduct usability testing and gather user feedback
- Prioritize intuitive navigation and visual aids

### *Customer Satisfaction*

- Collect feedback through surveys, forms, and rating systems
- Respond to user input and continuously refine documentation
- Prioritize clear language, helpful tone, and regular updates

## Documentation Types

In most cases, you will create an ISO 9001 procedure for every process. Many companies write too many procedures when, in fact, they should be documenting these directives as more specific work instructions.

A procedure is a uniform method that outlines how to perform a process. It typically contains elements such as:

- Why the procedure is required
- What needs to be accomplished and how it will be executed
- Who performs what action
- Where the inputs come from and where the outputs go
- Any locational requirements (i.e. where an activity is performed)
- The criteria (requirements) they must meet
- Tools, information or other resources required
- Terminology, definitions, explanations, etc.

When appropriate, create detailed ISO 9001 **work instructions** for each task that is needed to support each of your procedures. (A good rule of thumb is: if the procedure does not give enough guidance for someone to complete the task, create a work instruction.)

There are times more detail is needed than that which is described in the procedures. Many organizations include work instructions to detail specific tasks referenced in a procedure, aid in training and to reduce mistakes since the step-by-step instructions needed for accomplishing something may be missing from more generally drafted procedures.

However, this functional division between procedure and work instruction can be a good organizational tool – if there is an advantage to dividing up procedure(s) into many “sub-procedures” that are related but cover different aspects.

A work instruction will often repeat many of the elements of a procedure to help describe where it fits into the process such as:

- Purpose
- Definitions
- Responsibility

- Requirements
- Tools and information

## DOCUMENTATION TYPES IN DETAIL

### *1. Policy Level*

- Customer Support Policy  
Outlines the department's commitment to customer satisfaction, responsiveness, and quality standards.

### *2. Process Level*

- Support Ticket Handling Process
- Escalation & Resolution Process
- Customer Feedback Collection Process  
These define *what* happens and *who's responsible* at each stage of common support functions.

### *3. Procedure Level*

- Standard Operating Procedure (SOP) for Ticket Triage
- SOP for Phone, Email, and Chat Support
- SOP for Handling VIP Clients
- Incident Reporting Procedure  
Clear step-by-step actions to carry out processes consistently.

### *4. Work Instructions / Job Aids*

- Call Handling Checklist
- Email Response Templates
- Troubleshooting Guides
- Knowledge Base Articles for Reps

These are detailed enough to guide someone through a task—even on their first day.

### *5. Records and Logs*

- Support Ticket Logs
- Customer Satisfaction Survey Results
- Training Attendance Records
- QA Audit Results

Used to demonstrate compliance, track performance, and support continuous improvement.

## Writing Documentation

Align with brand guidelines and make sure the writing is accessible and inclusive. Processes must have defined (and hopefully measurable) objective(s), input(s), output(s), activities, and resources.

### THESE KEY ELEMENTS SHOULD BE PRESENT WHEN DEFINING A PROCESS:

#### *Inputs/Resources*

Specified requirements (needs), for example:

- What information do you need to start work?
- Where does that information come from?

#### *Activities*

Interrelated or interacting activities that use resources needed to achieve a specific output. All of the operations, activities, and sub-processes carried out to produce the desired result, for example:

- What are the basic jobs carried out in your department?
- Can you explain to me your operations here?

#### *Outputs*

Satisfying requirements (results), for example:

- Who receives the result of your work?
- How do you know if you've done your job correctly? (met objectives)

### WHEN WRITING DOCUMENTATION:

#### **1. Know Your Audience**

- Identify who will use the documentation (e.g., new hires, customers).
- Adjust tone and technical depth accordingly.

#### **2. Use a Clear Structure**

- Start with a table of contents or overview.
- Break content into logical sections with headings and subheadings.
- Use bullet points and numbered lists for clarity.

### **3. Be Concise and Precise**

- Avoid jargon unless necessary—and define it when used.
- Use short, direct sentences and an active voice.

### **4. Follow a Style Guide**

- Maintain consistency in formatting, terminology, and tone.
- Use a company-approved template if available.

### **5. Include Visuals When Helpful**

- Add screenshots, diagrams, or videos to clarify complex steps.
- Always label visuals and reference them in the text.

### **6. Use Version Control**

- Track changes and updates to keep documentation current.
- Clearly indicate the last updated date.

### **7. Review and Test**

- Have a peer or subject matter expert review the content.
- Test instructions to ensure they're accurate and complete.

### **8. Maintain and Update**

- Schedule regular reviews to keep content relevant.
- Archive outdated documents responsibly.

## **EXAMPLES OF CONTENT THAT MAY NEED DOCUMENTATION**

- Standard operating procedures (SOPs)
- Company Policies
- Communication protocols
- Tools and platforms used
- Troubleshooting guides
- Escalation paths
- Retention schedules
- Classification schemes
- Workflows
- Archives Management

## Learned Lessons

What are things you / your team learned from doing this process? What changes can be made to make the process easier next time? What ideas do you have that can help make you and your teams more efficient? Organize your thoughts / feedback

## Resources:

- Links / build out repository for other helpful things your teams can use
- Links to tools

## Best practices for Updating this Document

When updating this document, please make sure to take the following steps:

- Update the date on the title page of the document
- Refresh the Table of Contents