Documentation Guidelines/Playbook

Contents

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 onboarding, customer support, and troubleshooting for the Support departments.

Standard operating procedures (SOPs)

Communication protocols

Tools and platforms used

Troubleshooting guides

Escalation paths

Designated Contributors

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

5. Choose the Right Platform
Use tools like Confluence, Notion, SharePoint, or Google Docs—whatever fits your team's workflow and allows for easy access and updates.

6. Make It Searchable & User-Friendly
Include a table of contents, tags, and internal links. Use plain language and visuals (like screenshots or flowcharts) to boost clarity.

7. Train & Promote
Introduce the playbook in team meetings, onboarding sessions, and internal newsletters. Make it part of your culture, not just a document.

8. Review & Update Regularly
Set a cadence (e.g., quarterly) to review and revise content. Outdated documentation is worse than none at all.

ROLES AND RESPONSIBILITIES

A Role and Responsibilites Matrix will clearly define who is responsible for which role and processes.

Internal Project Teams

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

Documentation Methodology

When creating documentation there are a several factors to consider that are listed below:

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 use 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

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)

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.

- Document policies
- Document retention schedules
- Document classification schemes
- Document workflow
- Document archives management
- Latest trends in document management.

1. 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, such as how you control your suppliers. 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.

2. 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.)

1. 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.

2. 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

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