

Business Operations

Company Operations Manual Design and Form Considerations

Introduction

This Article presents some considerations that should be addressed before launching a project to write a Company Operations Manual. Early resolution of these issues can avoid some serious missteps and keep expectations inline with results.

The Problem

Company Operations Manuals can take on a variety of forms, shapes, and sizes. To wisely select one a number of issues must be considered. These issues are presented below.

Issues for Consideration

The Purpose of the Manual A Company Operations Manual will serve several purposes. Each should be considered in determining the design and form of the manual

- The manual will be used as a reference book by employees and must be divided and indexed extensively so that procedures are easy to find.
- The manual will be used as a reference map by top managers when considering changes. To be effective in this role it must present a smooth logical information flow and include the purpose and objective of the procedures.
- The manual, or portions of it, will be used as a form of 'text book' in training employees and others. Toward this end it must be organized around particular tasks and use the terms of the job.

In every company these 'purposes' place requirements on the design and form of the Company Operations Manual. These requirements should be identified and taken in to consideration.

The Nature and Size of the Business The size of an organization and the complexity of its business places many requirements on the form of a Company Operations Manual.

- How many Departments must be described?
- How many systems or processes must be detailed?
- How many transaction types must be explained?
- How complex are the interlocking relationships between the various Departments, systems, and transactions?

The answers to these questions will strongly indicate the size of the manual, this requirement alone may make some form options impractical.

The Expected Frequency of Change The number and frequency of

changes and additions to a manual has a huge impact on the choice of design and form. Smaller logical segments are generally easier to change but tend to breakup the flow of the document. Related issues with form are:

- Permanently bound manuals are both durable and impressive, but they are also extremely difficult to change.
- Loose-leaf binder manuals are both inexpensive and relatively easy to change, but they present substantial change distribution and control problems.
- Electronic manuals are easy to change and control, however viewing equipment must be available to employees - where they need the manual.

Careful consideration of the trade-offs here is crucial. Seriously out of date manuals will be ignored at best, relied upon at worst.

Security Security should be a major issue with Company Operations Manuals. If the manual is to be useful it probably contains some hard won information, some processes and procedures that were painful to develop. Consider:

- Could a competitor benefit from the information contained in you manual?
- Could an ambitious employee use the manual to start a competing company?

If the manual is any good the answers are of course "yes". Security measures need to be taken. An obvious and effective action is to distribute the manual in sections with each employee getting only the information they need to know. This somewhat diminishes the effectiveness of the manual but should be considered. Another important security measure is a properly worded employment agreement.

The People The people who use the Company Operations manual and the conditions in which they use it will place requirements on the design and form of the manual. To be effective the manual must be available when and where they need it. To be of value the contents must be in terms that they understand. Identify the individuals and the situations, then consider the requirements presented.

The Technology Available The technology available for use has an impact on the design and form of a Company Operations Manual. Electronic manuals have some very desirable features on the production side. However, employees must have some equipment for viewing them. A possible compromise is to produce an electronic manual and print and bind the sections needed by employees without equipment.

Summary

A Company Operations Manual can take on a variety of designs and forms. The choice of design and form should result from the requirements presented by:

- The purpose of the manual.
- The nature and size of the business.
- The expected frequency of change.
- The security necessary.
- The people who will use the manual.
- The technology available.

Consideration of these issues may seem painfully simple to some but failure to do

so may be simply painful.

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