

# Learn to Write Effective Policies & Procedures


Save yourself countless hours of writing and rewriting and protect your company from the threat of legal liability

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## You will learn how to:

- Write clearly and concisely to convey your message.
- Make your manual more than a list of what employees can't do.
- Avoid wording that could be misinterpreted or misunderstood.
- Avoid legal traps that even an expert could miss.
- Save time and improve efficiency.
- Improve readability and visual appeal so employees will read and reference your manual.
- Deal with employees tactfully when resistant to change.
- Ask yourself the right questions before producing or publishing any policy.



EXPRESS CODE

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This course qualifies for CPE credits. See details on page 7.

## Who should attend?

- Managers & Supervisors
- HR Managers
- Finance & Accounting Personnel
- Controllers
- IT Resources
- Anyone who writes policies as part of their job

## Write clear, concise policies and procedures that eliminate gray areas and end confusion.

Writing policies and procedures is probably one of your least favorite tasks, maybe even something you've been putting off for weeks — or months. You know it has to be done, but it seems like there's always something more pressing to handle. And when you do try to get started, you have so many questions about the process...

- "Is it best to write in the positive or do I focus on what employees should NOT do?"
- "What, exactly, are the legal traps I need to watch out for?"
- "Can I post this on our website, so it will be easy to update ... or should I distribute hard copies?"
- "What are the specific words and phrases that make people angry? I really want to avoid those!"
- "I'm no writer — so how am I ever going to tackle this job?"

You can get the help you need and answers to all these questions — including dozens you haven't even thought to ask — at this information-packed, one-day seminar. Here's the simple truth: Well-written, concise policies and procedures are the framework that holds your organization together and makes everything run smoothly and efficiently. Attend this one-of-a-kind, career-enhancing program and learn how to turn out solid documentation with skill and ease.

Don't wait until there's an unfortunate misunderstanding, a critical mistake, or even a lawsuit that well-written policies or procedures could have prevented. Take action today!

### How well-written policies and procedures benefit everyone:

Employees	Your Organization	You
Staff members understand what is expected of them	Managers can concentrate on strategic issues	You avoid endless questions on policies and procedures
Employees know exactly what the organization values and promotes	Day-to-day operations run more smoothly from top to bottom	Your time is freed up so that you can handle more creative assignments
Coworkers understand how to do their jobs	The company appears professional and productive from top to bottom	You appear in control and competent
Staff members can make decisions within established boundaries	Customer service is consistently good and overall quality improves	Your job is easier and more enjoyable
Employees grasp individual and team responsibilities	Because employees experience greater job satisfaction, they stay with the organization longer	You are able to solve disagreements quickly and easily because the policies are clear

# Policies & Procedures

Learn to Write Effective  
Policies & Procedures

## Do these situations sound familiar?

- Almost daily, you receive calls and emails from employees who don't understand the company's vacation policy ... or the sick leave policy ... or how the bereavement leave works. It seemed crystal-clear when you wrote it, but with so many questions coming up, you're beginning to wonder.
- You notice a group of employees huddled in the cafeteria snickering. When you get closer, it becomes clear that they're making fun of the company handbook's dress code policy. Maybe that stuff your predecessor wrote back in the '80s doesn't apply anymore.
- Your president is irate about the loophole in company policy that means your organization has to rehire a terminated employee — and pay a huge fine. You're hoping this mess won't put you in the unemployment line!
- Since none of the departments seem to be following the sick leave policy you circulated last month, you're beginning to wonder if any one bothered to read it. You wish you could somehow force employees to thoroughly read new policies. And you'd like to know how to make it easier to implement changes.

**If you've experienced similar situations, you owe it to yourself to attend this program. You'll come away with the smart strategies and innovative ideas you need to turn things around!**

## Templates, Tips, and Takeaways

The digital workbook you receive at the program is so much more than a training-day reference. True, it simplifies note taking and makes it easier to follow along, but it will be a valuable resource back at the office when you're ready to write your policies and procedures. Use it to take note of important points during the seminar, and you'll end up with a handy guide for developing manuals, handbooks, contracts, forms, and other important communications.

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## Have We Been Inside YOUR Office?

**It may seem like it when you read these real-life policy and procedure challenges ...**

- Employees continue to call me to find out if **vacation time can roll over** to the next year. Doesn't the employee handbook make the policy clear?
- Our art department thinks the company **dress code doesn't apply to "creative types."** I've got to enforce the policy, but how can I avoid a big battle?
- The managers' retreat is going to leave us with **no one onsite who has any real authority.** This has never come up before, and it's too late to ask someone to stay behind. What now? Why isn't this covered in the employee manual?
- Each employee receives a handbook the first day on the job, but whenever employees have questions, they'd **rather call HR than spend the time to look it up.** Our HR reps are tired of it. Is our manual too difficult to use, or are the employees just lazy?
- Our employee manual was written before the Internet and email came to prominence, so there's nothing in it about **surfing the Web, shopping online, social media, and trading personal emails.** Can we write a policy and just send it via email, or do we have to rewrite and issue a whole new manual?

**When it comes to policies and procedures, there are plenty of questions and far too many gray areas. Get the answers you need at this essential one-day seminar.**

## Everything You Want to Know and Procedures, But

### The Basics

- Policies and procedures defined — and how they're different from each other
- Telltale signs that your organization needs a written policy or procedure
- The benefits of policies and procedures — with respect to money, time, and peace of mind
- How to identify the areas within your company that are most in need of a new or refreshed handbook or manual
- The very real risks of poorly written policies and procedures
- What the law says about a company's employee communications
- The role of HR in developing documentation — what your department can and cannot do
- Clues that your verbal guidelines may need to be formalized into written rules

### The Critical Pre-Writing Phase

- Four foolproof steps to designing an on-target policy or procedure
- When it's best to start from scratch, and when you should revise existing documents
- A simple way to know which policies and procedures to include
- Great ideas for communicating complex procedures
- Tips that save time without sacrificing quality when information is needed fast
- How to choose the appropriate voice or tone for your writing: firm, friendly, compassionate, clinical, confident, authoritative, or even a combination
- The four critical phases of development
- How to identify your company's style and follow this standard
- When it's better *not* to put a policy in writing

### The Written Word

- Tools and techniques that make corporate writing a snap
- Wording tips from the pros to help you craft clear, concise, and correct documentation
- Five easy steps for writing the perfect document every time
- What you *don't* include, and why it's as important as what you *do* include
- The four essential elements of every work-book or manual
- Phrases that connect with employees — and others that are turnoffs
- The most important thought to keep in mind while writing your manual
- Which of the "old rules" no longer applies
- How the pros walk the fine line between clarity and thoroughness
- The art of cutting text without mortally wounding your message
- Strategies for avoiding language that creates an uncomfortable, legally binding contract
- How to set aside personal feelings about policies you don't agree with

### The Ideal Format

- How to determine which format matches your message
- Simple graphic elements and techniques that add interest and pizzazz that draw the reader in
- How graphics affect the readability and accessibility of your information
- Various ways to deliver your message (the Web, contracts, forms, handbooks, email, and intranet) and the advantages of each
- The vital element that is often omitted from a manual
- Flow-charting techniques that eliminate pages of text and communicate the message clearly
- Common design mistakes and how to avoid them

# Know About Writing Policies You Were Afraid to Ask

## **The Final Development Phase: Approval**

- How to determine who should — and who shouldn't — review your document
- A proofreading process that catches not only spelling and grammar mistakes, but content errors as well
- The best time to edit your own work
- A proven way to speed up the review process without sacrificing quality
- What to do to prevent a jumbled mess of changes you can't follow
- How to diplomatically put a limit on further changes once the document has been circulated
- The complete revision process, start to finish, and how to manage it

## **Implementation and Enforcement**

- A surefire way to get employees to read your policies and procedures
- Advantages and disadvantages of distributing policies online
- The best approach to distribution — how and when

- Techniques for defending a policy that employees dislike
- How to handle “fear of change” among doubters
- Three proven guidelines for announcing changes that you know will be unpopular
- The secret to being firm and committed without seeming like a steamroller
- Tips for preventing the misunderstandings that often develop when employees are notified of a change as a group

## **Maintenance — How to Keep Up Your Good Work**

- Why you should have a timetable for updating policies and procedures
- A sure sign that it's time to bring things up to date
- The hidden danger in not regularly reviewing old policies and procedures
- How to know whether your organization has too few — or too many — rules
- Going digital: what it means, when and how you should make the leap

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**Do yourself a huge favor —  
Allow yourself one day of focused,  
on-target training that fully prepares  
you to write, revise, and publish clear  
policies and procedures.**

# 5 Reasons to Attend THIS Skills Program Now

## You'll learn how to:

### 1. Recognize the differences between policies and procedures — and ensure that they fulfill their particular roles.

Although both play a vital role in your organization, a policy is very different in its purpose than a procedure. Together, these two form the strategic link between your organization's vision and what actually happens on a daily basis. After this seminar, you'll understand how to meet the intended goals of each.

### 2. Write for clarity and design for ease of use.

How much text is too much? Does your writing read like a novel? (It shouldn't.) Will employees be able to easily find the information they're looking for? Has the designer developed flowcharts and diagrams that clarify the written text? Is your manual pretty to look at but not really functional? We'll show you how to take a simple, straightforward approach to the writing. And whether your project is a manual, a form, or a website, we'll focus on ways to design documentation that's truly employee-friendly.

### 3. Streamline the approval process.

You started routing your manuscript two weeks ago, and it seems to be lost in a black hole. When you finally track it down, it's covered with edits and comments. The problem is that some of the edits contradict others, and you can't really tell who changed what. You're facing hours of frustration, follow-up, and deciphering — and you wonder if it might be easier to just start over. There is a better way. During this training, we'll discuss ways to limit changes, who to ask for input, and how to get your manuscript back quickly, so you can move your project toward completion with minimal delay.

### 4. Get the staff to read (and refer to) your written materials.

Nothing is more frustrating than repeatedly being asked the same questions about issues that are fully covered in the employee handbook. You're beginning to think the manual you spent so many hours carefully compiling, writing, and perfecting is being used as a paperweight on a lot of desks. You wind up constantly repeating the information — perhaps through clenched teeth — as professionally and positively as you can. It doesn't have to be this way. Learn a system that not only gets the information to employees, but also gets them to use it without daily calls to HR.

### 5. Handle changes and updates easily.

The day after you distribute brand new manuals, you get a call from a department manager who wants to be sure you're making a certain change to one of the policies. "Is it too late?" she asks. At this seminar, you'll learn how to easily incorporate changes in published documents and integrate them into your manual with minimal hassle. Find out how to use new technology wisely, so that everybody — even the "technology-challenged" — gets the message.

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## Need Help?

If you need real help writing, editing, and implementing policies and procedures, you won't find a better program than this one. By day's end, you'll be ready to take on your most challenging assignment with confidence.

# Registration Information!

## Onsite Training Solutions

### Get the Results You're Looking For!

Bring our powerful, high-impact training programs to your organization and show your employees that you're serious about their professional growth and achieving critical organizational goals and objectives.

### Choose From Over 150 Courses!

From management development to customer service, our comprehensive library of courses provides a learning experience that is engaging, interesting and intriguing!

### Tailor the Training to Meet Your Specific Needs!

We'll help you choose the appropriate courses for your organization and tailor each one to address your specific goals, issues and scheduling concerns.

### Maximize Your Training Budget!

Onsite Training allows you to train work groups, teams and entire departments for less than the cost of traditional public seminars or other training options.

Give your staff the skills, knowledge and confidence they need to meet tough workplace challenges head-on, realize their full potential and perform at their peak.

For a free consultation, visit us online at [pryor.com/onsite](http://pryor.com/onsite) or call us at **1-800-944-8503**

**Enroll Today!** Hurry, our seats fill fast. Guarantee your enrollment by paying your tuition today. You will receive a confirmation once your registration is complete. **Payment is due before the program.**

**Quick Confirmation!** To receive your confirmation within 48 hours, please complete the Quick Confirmation section of the registration form. Be sure to provide us with your email address and/or fax number.

## Cancellations and Substitutions

You may cancel your registration up to 10 business days before the program, and we will refund your tuition less a nominal cancellation fee. Substitutions and transfers may be made at any time to another program of your choice scheduled within 12 months of your original event. Please note that if you do not cancel and do not attend, you are still responsible for payment.

### Please Note

- You will be notified by email, fax, and/or mail if any changes are made to your scheduled program (i.e., date, venue, city or cancellation).
- Walk-in registrations will be accepted as space allows.
- For seminar age requirements, please visit <http://www.pryor.com/faq.asp#agerequirements>.
- Please, no audio or video recording.
- You will receive a Certificate of Attendance at the end of the program.

## Tax-Exempt Organizations

If you are tax-exempt, enter your tax-exempt number in Section 4 on the Registration Form. Please mail or fax a copy of your Tax-Exempt Certificate with your registration for payment processing.

## Tax Deduction

If the purpose of attending a Fred Pryor seminar is to help you maintain or improve skills related to employment or business, expenses related to the program may be tax-deductible according to I.R.C Reg. 1.162-5. Please consult your tax adviser.

## Continuing Education Units (CEUs)

Fred Pryor Seminars offers CEU credits based on program length and completion. Credits are issued according to the National Task Force for Continuing Education guidelines and approval is at the discretion of your licensing board. **Questions or concerns should be directed to your professional licensing board or agency.**

## Continuing Professional Education (CPE)

Fred Pryor Seminars and CareerTrack, divisions of Pryor Learning are registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of Accountancy have the final authority on the acceptance of individual course for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: [www.nasbaregistry.org](http://www.nasbaregistry.org). Fred Pryor Seminars and CareerTrack's Sponsor ID number is 109474. This course qualifies for 6 CPE credits.

## Completion & Continuing Education Certificates

To obtain a certificate documenting your completion and/or CEU or CPE credits, please visit [www.pryor.com/certificate](http://www.pryor.com/certificate). Certificates will be available 10 days after your event has ended.

## Guaranteed Results!

All of our seminars are **100% SATISFACTION GUARANTEED!** We're confident that this seminar will provide you with the tips and techniques you need to successfully write clear, concise policies and procedures. If for any reason you are dissatisfied, send us a letter (Attn: Customer Relations) within 30 days of your seminar attendance stating the reason you were not satisfied, and we'll arrange for you to attend another one of our seminars or receive a full refund — *hassle-free*.

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**Your VIP # is WINQ**

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<b>4</b>	<b>METHOD OF PAYMENT</b> <b>Important: Send your payment now. Tuition is due before the workshop.</b> Please make checks payable to Fred Pryor Seminars and return form to: P.O. Box 738002, Dallas, TX 75373-8002. Our federal ID# is 92-2053228 (FEIN). Please add applicable state and local tax to your payment for programs held in Hawaii (4.16%), South Dakota (6.5%) and West Virginia (6%). <b>Please check one of the following:</b> 1. <input type="checkbox"/> Registration fee enclosed. Check # _____ Amount \$ _____ 2. <input type="checkbox"/> Our Purchase Order is attached. P.O. # _____ 3. <input type="checkbox"/> Bill my organization. Attention: _____ 4. <input type="checkbox"/> Charge to: <input type="checkbox"/> AmEx <input type="checkbox"/> Discover <input type="checkbox"/> MC <input type="checkbox"/> Visa Exp. Date: _____ Acct. #: _____ Card Holder's Name: _____ Tax-Exempt #: _____ <i>Please attach a copy of your Tax-Exempt Certificate for payment processing.</i>	

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