



Before You Start

- ❑ Find in-house policy and procedure resources, such as a policy manager or legal counsel
- ❑ Develop a policy and procedure charter and get senior management support
- ❑ Clearly define the problem the document should address
- ❑ Find a document management platform or at a minimum, find an appropriate template



Research Your Documents

- ❑ Get input from all roles and departments affected by policy
- ❑ Read current documentation
- ❑ Read current regulations and get input from legal counsel



Write Your Draft

- ❑ Use plain, precise, jargon-free language
- ❑ Break text into scannable chunks



Get Documents Reviewed and Approved

- ❑ Get final legal and regulatory review
- ❑ Have representatives of all stakeholder groups review document—both end-users and managers
- ❑ Get senior management sign-off



Publish and Implement

- ❑ Train everyone in the new policy—from employees to C-level
- ❑ Establish a policy and procedure review cycle
- ❑ Publish the document so that all who need it can find it