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Why you should kill the operations manual

If you look around your place of business, you'll probably find a dusty shelf somewhere that contains an ancient archaeological relic. It might have been left over from the person who worked there before you. Or, you might have received the artifact in new employee training. No matter how you received it, you've probably forgotten entirely about your company operations manual.

Instructions about the manner and practice of work are as old as written language. If we did not believe operations manuals were valuable, we would not invest millions of hours into producing them. So why do these manuals always seem laughably outdated?

The most troubling aspect of written documentation, however, is not the waste of resources used to produce them or the



VIEWPOINT

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fact that actual procedures don't match the printed word. When we do pull out the operations manual, it's often a defensive maneuver. We might have better ideas about work or be prepared to have a meaningful discussion, but nothing silences dissent or innovation faster than a ream of official paper.

To understand how to fix the operations manual, we have to first understand what is broken. In businesses and not-for-profits alike, the desire to create narrative documentation is almost innate. Describing work patterns using prose gives us a sense of importance and immortality. When we post signs, write out company policies, or create checklists, it feels like we are building the structure of the corporation.

Our intentions are healthy and appropriate. Organizations of any size benefit from some degree of order. The problem is that the form of a *written narrative* does not match the experience of the *flow of work*. Printed volumes are great for novels and nonfiction books, where the plot should slowly unfold and skipping to

the end is rarely advisable. Furthermore, these tomes are intended to be definitive. They represent a series of ideas frozen in time with the sole purpose of presenting some artistic or technical message.

Work flow, however, is always changing. The way you answer the phone may be different today from tomorrow; indeed, even *where* we answer the phone is uncertain. The practices we use to assist customers, process requests, manage data and conduct analysis are constantly renewed. Whereas a novelist has absolute power over the reader to dictate the story, the relationship between employees and work is much more personal. Work, after all, is what actually happens when no one is watching. The manual might urge a particular sequence of tasks, but it is what employees personally decide to do that leads to results.

How do we resolve apparent clash between written instructions and individual innovation? The answer is in two parts. First, instead of trying to capture work flow in words, we should use images. Engineers describe circuits using

diagrams, chemists develop formulas via pictures, and architects envision their creations through blueprints. We should describe work in the way we think: as visual schematics.

Second, we need to recognize that all of us have jobs not just because we can follow instructions, but because we have the intelligence to know when instructions need to be improved. Work-flow diagrams represent the opportunity to empower stakeholders. If we merely put diagrams up on the walls rather than hiding written instructions in drawers, employees may still silently ignore them. However, if these documents are hand-drawn rather than neatly printed and managed by workers themselves, they have the potential to become part of the culture of work.

There's no need to pull down your operations manual and throw it in the trash. Instead, start a conversation at your office about documenting work flow visually. Encourage your co-workers to share their ideas for improvement and explain them as diagrams. Support continuous improvement at your organization by moving away from narrative authority and embracing innovation from the bottom up.♦

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