Before You Start

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- 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
- $\hfill\square$ Publish the document so that all who need it can find it