

Process Documentation Style Guide [Sample]



Overview

The purpose of this style guide is to establish clear standards for creating process documentation that is consistent, easy to understand, and valuable for our team. By following these guidelines, we ensure everyone can easily access and use the information they need to perform their tasks effectively.

Our goal is to create process documentation that is:

- **Clear:** Easy to understand, even for those unfamiliar with the process.
- **Concise:** Gets to the point without unnecessary details.
- **Complete:** Covers all essential steps and information.
- **Consistent:** Follows a unified structure and style across all documents.
- **Accessible:** Easy to find, navigate, and use.
- **Up-to-date:** Reflects the most current information and practices.

Effective process documentation empowers our team to:

- **Work efficiently:** By understanding the steps involved and their role in the process.
- **Minimize errors:** By following clear, standardized instructions.
- **Maintain consistency:** By ensuring everyone follows the same procedures.
- **Improve continuously:** By identifying and addressing areas for improvement.

Formatting

- **Document Type:** Use a digital format that allows for easy editing, sharing, and version control (e.g., Google Docs, Microsoft Word, Notion, Confluence). Avoid static formats like PDFs for frequently updated processes.
- **Font:** Use a clear, professional sans-serif font like Arial, Calibri, or Helvetica.
- **Font Size:** 12pt for body text, 14pt for headings.
- **Line Spacing:** 1.15 for better readability.
- **Margins:** 1-inch margins on all sides.
- **Headings:** Use a hierarchical structure (H1, H2, H3) to organize the content and make it scannable.
- **Numbered/Bulleted Lists:** Use for sequential steps, lists of items, or to break down complex information.
- **Visuals:** Incorporate relevant visuals (flowcharts, diagrams, screenshots, videos) to enhance understanding. Label visuals clearly and reference them in the text.
- **Tables:** Use tables to present data, comparisons, or information that requires a structured format.

- **White Space:** Use ample white space to improve readability and prevent the document from feeling cluttered.

Terminology

- **Glossary:** Create a glossary of terms (if needed) to define acronyms, jargon, or technical terms. Link to the glossary within documents for easy reference.
- **Consistency:** Use the same terminology throughout all documentation to avoid confusion.

Language

- **Clarity:** Write in plain, concise language. Avoid long sentences and complex vocabulary.
- **Active Voice:** Use active voice for clear, direct instructions.
- **Second Person:** Address the reader as "you" to make the instructions more engaging and personal.
- **Imperative Mood:** Use the imperative mood for instructions (e.g., "Click the button," "Enter the information").
- **Positive Framing:** Focus on what *to* do rather than what *not* to do.
- **Concise Sentences:** Aim for an average sentence length of 15-20 words.

Structure

- **Introduction:**
 - Process Name and ID
 - Purpose Statement (one sentence, starting with an action verb)
 - Goals (2-3 measurable outcomes)
- **Scope:**
 - Clear start and end points
 - Inclusions and exclusions
- **Process Map/Flowchart:** Visual overview of the steps
- **Roles and Responsibilities:** RACI matrix or similar format
- **Detailed Steps:** Numbered list of actions, including decision points and exceptions.
- **Metrics/KPIs:** How success is measured
- **Additional Information/Resources:** Links, templates, tips, etc.
- **Revision History:** Log of changes with dates and authors

Additional Best Practices

- **User Testing:** Have team members not involved in the creation process test the documentation to identify any points of confusion.
- **Continuous Improvement:** Encourage feedback from users and regularly update the documentation as processes evolve.

By following these guidelines, we're create and sustain robust process documentation system that supports our team's success and drives continuous improvement within our organization.