THE ANDERSON @gency Report

Best Technologies & Best Practices for Superior Results

Best Practices Documentation and Management

By Pat Alexander

I often write about how to define, implement, and monitor best practices. In talking with agencies, I find that one of the biggest challenges is determining the best way to publish documentation. Another challenge is how to keep the information current.

This article will discuss the following three topics which I believe address these issues:

- What is the best way to publish best practices?
- How and when do we review and update best practices?
- Who edits best practices?

☑ What is the best way to publish best practices?

Ask yourself, "How do I make this information most user friendly for our staff?" Staff will not use best practices information if it takes longer to find what they are looking for than it would if they did the process the old way.

I recommend a format that is in a searchable "help authoring tool." There are a number of software products available for creating this type of documentation. I did two different Google searches to see what the current results are. I searched first for "help authoring tools" and RoboHelp, DocToHelp, and Flare came up in the results. Then I searched for "asp help authoring

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tools." The results included *HelpSmith.com* and *Helpauthoring.net*.

Some of my clients decide that they will use Adobe or a Microsoft Word document. These documents are not as easily searchable as help authoring tools. Research various products to determine which format will work best for your staff.

☑ How and when do we review and update best practices?

Reviewing and updating your best practices is a continuous process. Earlier this year, I had a situation where it was necessary to amend and update a section of a client's best practices just a few weeks after that section had been defined and agreed upon. The agency management system vendor made a major change to the functionality for that particular process.

Thus, what had just been defined needed to be re-defined, documented, trained, and implemented as soon as possible. With older agency managements systems, changes don't occur as frequently. However, in today's world, improvements and modifications happen more frequently.

Staying ahead of research, definition, documentation, training, and implementation phases is more challenging. Online agency management systems share information with their clients about the next release. However, until its actual release, it is difficult to know exactly what the functionality will be and what changes need to be made.

☑ Who edits best practices?

I have also seen a change to a process made on the spot during a conversation or meeting. When this happens, frequently there is not proper documentation or communication to everyone about the change. This causes confusion and a disintegration of the published best practices. When this occurs, people revert to their own processes.

As you can see, there are many occasions that require a review and edit of your best practices. So who edits? In a recent conversation with some of my colleagues about this subject, they thought the agency's best practices should be in an open wiki that anyone in the agency could edit. They believe that since the staff knows the quickest and simplest way to do all processes, they should define the processes and edit them.

Wikis are Web sites that use wiki software, allowing anyone to easily create and edit any number of interlinked Web pages, using a simplified markup language or a WYSIWYG text editor, within the browser. Wikis are often used to create collaborative Web sites, to power community Web sites, for personal note taking, in corporate intranets, and in knowledge management systems.

As you might imagine, I have a few issues with the self-define, self-edit program. Some of these are:

- Usually each staff member has his/her own way of doing a process.
- When there are such differing opinions on standards and processes, it seems anyone could overwrite content to show his/her preference.
- Will the wiki track what process was in effect at the time an errors and omissions claim questions that process?
- If everyone is allowed to change a process at will, everyone will have to constantly check for the most current way to perform the process.

My colleagues told me my concerns were old-fashioned and out-of-date. Well, of course that set me to thinking they might be right. So I checked with insurance agents' errors and omissions underwriters. They agreed that those who do the work should help create the procedures.

However, the standard best practices documentation should be available to staff in an unalterable format with traceable dates of publication. This creates a time during which the process was in place and ensures that all employees, including managements, are advised and aware of the correct procedure at all times.

A properly established wiki is highly searchable and very user friendly and would be as good a solution as the others discussed at the beginning of this article. However, this

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particular section of an agency's wiki should not be editable by anyone except the same individuals who would have the authority to edit the other solutions.

It is important that when there is a change to your best practices, a new version be published with a new edition date. The recently retired version should be stored in a permanent location on your network. All previous versions should be retained in accordance with your document retention policy. In this way, you will have the needed documentation should there be questions about the process for an audit, an errors and omissions claim, or other instances when you may need to refer back to prior versions.

Patricia Alexander, CIC, is a Consultant, Coach & Mentor. Her many years of experience in retail agency and MGA settings gives her a broad range of knowledge in agency operations. She is dedicated to educating her clients on using their technology to enhance and build their business and profitability. Subscribe to Pat's Blog via her Web site *www.patalexander.com*. She may be reached at *pat@patalexander.com*.

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