

Creating a Desk Manual

A Desk Manual is a resource that provides **instructions** for the **daily duties** and **responsibilities** (and their **procedures/tasks/steps**) for a **particular position** in a department.

Elements of Instructions

1. **Introduction:** Describes the purpose or need for the duty or task.
2. **Warnings/Cautions:** Ensures correct application of instructions to prevent harm (informational, relational, or physical).
3. **Necessary Background:** Explains prior knowledge or information essential to understanding of Instructions.
4. **Equipment/Supplies:** Lists items necessary to complete instructions (e.g. software, forms, materials, information).
5. **Steps:** Detailed explanations of each step necessary to complete task or duty.

Writing Strategies

1. **2nd Person:** Write directly to the reader using “You” statements or “implied you.”
2. **Verbs:** Begin steps with verbs.
3. **Headings:** Use headings to distinguish sections from one another.
4. **Lists:** Incorporate lists of actions, especially in the “Steps.”
5. **Explain:** Be succinct, but also be sure to explain each step so that it is fully understood.
6. **Graphics:** Include images or graphics to clarify steps whenever useful (e.g. blank forms and sample completed forms).

Tip:

Before you finalize instructions for a task, ask a colleague to conduct the task exactly as you have written; see if you get the results you intended!

Creating a Desk Manual Drafting Instructions

2. Select **one of your duties/tasks** and draft Instructions for it.

- Introduction
- Warnings/Cautions
- Necessary Background
- Equipment/Supplies
- Steps

Creating a Desk Manual

Generating Content: Task Overview

1. What are the first three tasks you do each day? Which of these would someone need to do if you were gone?

2. What are three tasks you must complete before you leave? Which of these would someone need to do if you were gone?

3. Do you have other tasks that must be completed every day? What are they?

4. Note up to three tasks that you find incredibly easy about your job.

5. What are the three most important tasks in your job?

Creating a Desk Manual

Generating Content: Work Log

Keep this document with you for one week. Jot down what you are doing every half-hour. Which of those tasks would someone need to do if they were covering for you?

	Monday	Tuesday	Wednesday	Thursday	Friday
8:00a					
8:30a					
9:00a					
9:30a					
10:00a					
10:30a					
11:00a					
11:30a					
12:00p					
12:30p					
1:00p					
1:30p					
2:00p					
2:30p					
3:00p					
3:30p					
4:00p					
4:30p					
5:00p					
5:30p					