

Six Ways to Revitalize Your Operations Manual

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“Harry, where’s the Administration Manual? I’ve got reports due tomorrow at the franchise office. I’ve got to have the right accounting procedures.”

“Hey, you have any idea when our ___ is due? And don’t give me that worthless procedure manual. It’s bigger than a dictionary and impossible to find anything in?”

“We really need to do something. These franchisees keep calling me to answer simple equipment maintenance and troubleshooting questions. I don’t have time to do my real job? Why don’t they use their manual?”



Sound familiar? Keep reading.

The Operations Manual: An Effective Sales Tool

Experienced franchisors insist that well-written, thorough operations manuals and training materials are their best sales tools. When a prospective franchisee must choose between several franchises, he/she will select the franchisor that provides the most support, which includes operations manuals and training materials that are easy to understand and use and that assist them in running a successful franchise.

Why don’t franchisors develop effective, user-friendly operations manuals? Why don’t employees use their operations manual?

Surveys reveal the following reasons:

- New franchisors don’t have time to rewrite their operations manuals because they have many other tasks they must accomplish while preparing for the franchise offering.
- Franchisors believe that their existing operations manual is “good enough.”
- Many don’t know how to improve their existing operations manual and training.

Both new and experienced franchisors need to revitalize their operations manual and training materials. New franchisors often keep critical, unique operational details in their head, not in their operations manual. Experienced franchisors who want to rapidly expand across the US or into other countries must review and update operations and training materials before the expansion.

Perhaps you want to move your franchise up to a Level 2 or 3 business. Updating your operations manual is not difficult. In the balance of this article we will discuss six critical approaches to revitalizing your operations manual and training materials.

1. Write for the User, Not the Lawyer

Most people view operations manuals as boring necessities, not particularly useful, written in language only a lawyer or insurance agent could understand. These text-based manuals, usually organized into a complex numerical hierarchy of headings, sub-headings, and sub-sub-headings, conceal as much critical information in buried sub-sub-headings as they reveal. These operations manuals are often so large that they are difficult or impossible to move or use. Manuals that use this writing approach seldom appeal to either the new or experienced user.

Some writing approach alternatives include:

- Using descriptive headings that explain the process or procedure more completely. (Overview, Stage 1, Stage 2 etc. or Form ABC, How to Complete Form ABC)
- Limiting procedures to no more than 7 steps. (If a procedure has more than 7 steps, break it into a series of procedures with more specific descriptive headings - “How to ...”)
- Using simple sentences and omitting unnecessary words.
- Using bulleted and numbered lists to help the learner more easily identify important elements.

Many of our clients as Power Training & Development expand their reference oriented operations manual into a dual-purpose tool by including training tasks as well.




You can use several methods to create a dual-purpose operations/training manual:

- Include a quiz at the end of the critical topics (i.e. equipment maintenance, marketing efforts, or administrative processes). Users can identify the most important information because the manual tests them on it. The approach gives the franchisee manager an objective way to certify and evaluate employees.
- Incorporate case studies which illustrate ways to meet challenging situations and better understand complex procedures. Adults learn by connecting new information to prior experiences, which makes case studies and scenarios a more effective method.
- Provide a management version of the operations manual that franchisee management can use to train their employees. The management version would include “Training Tips and Examples” that the trainer can reference.

Prior to creating your dual-purpose operations manual, identify the most critical areas of your business - the ones that separate your franchise from your competitors, such as your customer service process or efficient procedures used to provide a product or service. Focus on these important areas in the training sections of the manual.

2. Use Illustrations and Graphics

The old cliché, *a picture is worth a thousand words*, is still true. Use visual aids such as flow charts and completed example forms to teach important processes or procedures. Illustrations bring complicated procedures to life. Graphical icons help visual learners by marking content that reappears throughout the manual. Icons also create a more user-friendly operations manual. Some examples:

-  marks a key point, process, or procedure
-  marks a procedure that is done monthly
-  marks a safety or health issue
- Use boxes and tables to present information, making it easy to locate, identifying its importance, and making it easier to recall.
- Use shading in boxes to differentiate types of information or highlight critical content.
- Use flow charts and diagrams to explain complex processes or procedures rather than words alone.

Loan Payment - Cash

Step	ACTION
1	Enter account #
IF	THEN USE
Consumer Loan or Real Estate Loan	Loan number
Visa or MasterCard	First eleven digits of account number
Tax Deposit	Customer's Tax ID # or Employer ID #
2	Press ACCT#
3	Insert loan coupon. If Visa...

3. Use Alternative Formats

The traditional operations manual is one **BIG** document printed on 8.5 x 11 inch paper with tabs to divide sections. Some users consider using it for a boat anchor or door stop!

A better format option is to separate the **BIG** document into smaller booklets and color code them for easier identification. For example, Safety and Sanitation has a green cover, while a blue cover identifies the Administration section. Three hole punch these small booklets and keep them in a three-ring binder. When he/she needs reference or training for a particular process or procedure, the trainer/user removes the booklet and reviews the information with the trainee. This eliminates lugging the **BIG** binder around and reduces the possible loss of important pages.

A portable operations manual is one of our most popular options at Power Training & Development. Divide the traditional operations manual into separate manuals for each function such as: Administration, Food & Beverage, Equipment, and Human Resources. Print each on legal paper in landscape orientation, fold in half, and collate into a manual that is 8.5 x 7 inches and fits into a briefcase. Surprisingly, this size manual actually contains the same amount of text as an 8.5 x 11 inch page.

4. Use an Interesting Type Face (Font) and Style

An interesting font and style will make your operations manual much more readable. To create consistency in your documentation, use the same font and logo you use in your advertising. If your franchise operation is a casual business such as dog grooming or children's party providers,

use a less formal type face and style to convey the fun, upbeat, nature of the business. For a more traditional business, use a type face and style that mirrors stability and professionalism.

Use font sizes at least 2 to 4 points larger than the text so users can quickly scan and locate information they need. Include extra space **before** the heading rather than after to indicate to readers that the information that follows the heading is associated with it. Varying the size and type of font will also keep the user's interest. Using **bold** and *italics* can reinforce important information.

5. Layout – The White Space

When you include white space on a page, you make it easier to read, cause the reader less eyestrain and make titles/headings stand out more clearly.

You may also try the formatting called information mapping. Organize the content in two columns, arrange the titles on the left side of the page for easy scanning and locate the content/explanation on the right side across from the title. The most successful versions of this layout use headings that describe the content, such as “How to fix a leaky faucet.” For a warehouse receiving system, the titles along the left might be: Introduction, Definition of Receiving, and Importance of Receiving. You can get more on information mapping by visiting www.infomap.com.

6. Alternative Delivery Method

Rapid technological changes mean that you can now deliver your operations manual using several methods, including CD, Intranet, paper, and/or job aids.

Many forward-thinking franchisors provide an electronic operations manual on a CD or on the company's intranet, methods that save time and money. Instead of waiting until the next manual is published, a process or procedure change can be communicated immediately. Providing the manuals on a CD or intranet significantly reduces the printing and mailing costs.



An electronic operations manual, however, requires different text-organization methods than paper-based manuals. Electronic manuals are powerful because they link information that is relevant and useful via hyperlinks, giving users quick access to additional detail on a topic.

Very soon, companies will be able to place an operations manual on a PDA, enabling field personnel or employees to easily reference a section no matter where they are. Digital video can accompany equipment manual sections to help explain a more complicated cleaning and maintenance procedure.

While you revitalize the content of your operations manual, note areas where these future applications may help your business. When the new technology becomes available, you will know where to use it.

Another very powerful and inexpensive delivery method is a job aid, which is essential for key procedures or hard-to-remember information and is usually presented on a laminated sheet of paper. Users can put them in their pockets, next to the telephone or computer, or above their workstation for easy access. Job aids can also have English text on one side and additional language translations on the back as needed.

In Summary

Whether you are a new or experienced franchisor, you can use a series of simple and easy ways to revitalize your operations manual and training.

- Identify your key processes and procedures first so that you have the necessary content for the revitalization. (Consider meeting with your Franchisee Advisory Committee to help in this and capture “Best Practices”)
- Incorporate training into your operations manual. Use scenarios, case studies, and worksheets to create an interactive operations manual.
- Develop a trainer’s version of the operations manual, which guides the trainer to a more successful training session using “Tips and Examples.”
- Edit your existing manuals to create:
 - More white space
 - Bulleted and numbered lists instead of text paragraphs
 - Icons and/or graphics
 - Boxes, tables, flow charts
 - Simple sentences. Remove extraneous words that hold no value.
 - Descriptive headings
- Interesting font styles and size
- Layouts that are easy to scan
- Multiple delivery methods

By applying these methods to your operations manual, you will also revitalize your business, your franchisees and their employees. You may even improve franchise sales.



Paula Powers is CEO/President of Power Training & Development, Inc. which provides innovative documentation, templates, and training for the franchise industry, including preparation of content for electronic delivery. Some of her clients include: Wolfgang Puck Worldwide, Ruby’s Diner, Del Taco, Café Yumm!, and One Week Bath. She can be reached at 949.733.0801 or paula@powertd.com.