

## Best Practices Shared from the Group Regarding Process Documentation

- SOPs – Set up bi-weekly meeting with QA to review
- “Gold source”
  - Single owner responsible for updates with backups
  - Review the Schedule
  - Revision Period
- Have documents stored in one location with links to this document in other locations. This way the document only has to be updated once
- Utilize a Sharepoint site
- Keyword Search (coding)
- (Index) Newsletters
  - Topics
  - Date Code Folders
- Version History – Who made what changes when
- Cancel/Supersede
- Utilize an intranet – an advantage of this is that it will auto populate the date of changes as well as by who
- Ability to review documentation
  - Easily accessible
- Utilize a consistent template for process documentation
- Process workflow – Color Code Shapes
- Collaboration with appropriate depts./team members
- Don’t be “too” processes documented so that agents stop thinking for themselves. Utilize the processes as guidelines.