

Home & business productivity

# Build your documentation strategy like a business plan

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Whether looking to improve police incident reports, streamline workflows for in-field workers, or seeking to optimize other business paperwork, build a better plan using these three core strategies and create a more productive, efficient and compliant documentation experience.

Documentation management is like building a business plan. You create a vision of what you're trying to achieve; assess strengths, weaknesses, opportunities, and in some instances, any threats; and then create a realistic strategy on how to execute your plan. We usually discuss this type of process when working with business leaders looking at how best to manage documentation within their organizations.

While there are many strategies that can be deployed when talking documentation improvement, here are three that should be central to any comprehensive optimization plan.

## 1. Make accuracy the cornerstone of documentation process improvement

I say this often; in fact, I addressed it in a previous post: [documentation accuracy](#) is the most important component of any documentation workflow strategy. Documents, if not created accurately the first time, can impact vital areas of your business, and in many instances, impede productivity. More time spent

creating inefficient documentation is less time spent on other critical tasks. A worst-case scenario: inaccurate documentation can result in non-compliance, ruin business reputations, not to mention, cost money.

Industries like Financial Services, for instance, are now being held to even higher compliance standards because of new fiduciary rules. As a result, their advisors must document interactions with clients in greater detail to help mitigate [financial compliance risks](#).

Law enforcement has an even stricter edict. If an incident report is not detailed and complete – and delivered on time, it can result in criminals walking free. While this is a more extreme example, the ripple effects of inaccurate documentation should not be taken lightly.

## 2. Factor mobility into your documentation workflow

In many fields, the ability to document and capture information in real-time is important. This is where [mobile documentation](#) has a significant impact. As noted earlier, accuracy is critical, and real-time note-taking can help. When the immediacy of relaying vital information from the field to other peers is paramount, mobile documentation becomes even more critical.

Take social workers, for instance. They need to create a home visit report after each meeting with a client. These reports provide valuable and relevant information for case assessment and planning. If details are not documented and delivered in a timely manner, this can impact the services children and families receive.

With the mobile workforce expected to exceed over 100 million in the next few years, a documentation workflow strategy without mobility is less than efficient.

## 3. Acknowledge documentation pitfalls – and address them head on

Several years back we were meeting with the [Chatham-Kent Police Department](#). They had been struggling with a less than ideal incident report process, resulting in inefficient report submission, significant backlogs, delays in overall progression of cases, and persistent problems with the quality of reports being filed. It was clear to them – and us – that changes needed to be made to their overall reporting strategy.

Being able to acknowledge when and where something is going wrong is extremely important. Addressing pitfalls head-on allowed Chatham-Kent to achieve an 80% reduction in report time, incorporating a new reporting process that included speech recognition technology.

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Tags: [Dragon voice recognition](#), [Documentation workflow](#)

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