

Process Documentation Template

Write down how one core process actually runs, in a format anyone on your team can follow. Start with the process that stalls when one particular person is out.

How to use this template

1. **Pick one process.** Choose something that repeats and matters, like quoting a job, onboarding a client or closing the month.
2. **Sit with the person who does it.** Walk through it with them while they work, or right after. Write what happens today, including the workarounds.
3. **Write each step as an action.** Start every step with a verb and name who does it: "Office manager sends the signed quote to the scheduler."
4. **Test it.** Hand it to someone who doesn't normally do the work and let them follow it. Every place they stop to ask a question is a gap to fill.
5. **Set a review date.** A process document is only useful while it's current. Check it at least once a year, and whenever a tool or role changes.

This PDF is fillable. Type into the shaded fields and save, or print it and write by hand.

1 Process overview

The basics someone needs before they read a single step.

Process name	
Process owner The one person responsible for keeping it working	
Purpose Why this process exists and what it delivers	
Starts when The trigger, e.g. a signed contract arrives	
Ends when What 'done' looks like	
How often Daily, weekly, per order, monthly	
Typical volume and time e.g. 15 a week, about 40 minutes each	
Who receives the result Customer, another team, a system	
Where this document lives Shared drive folder, wiki page, binder	

2 Inputs and outputs

What has to be in hand before you start, and what the process produces.

Inputs

#	WHAT'S NEEDED	WHERE IT COMES FROM	WHO PROVIDES IT
1			
2			
3			
4			
5			
6			

Outputs

#	WHAT'S PRODUCED	WHO RECEIVES IT	WHERE IT'S STORED OR SENT
1			
2			
3			
4			

3 Roles

Everyone who touches the process, and who covers for them.

#	ROLE	RESPONSIBLE FOR IN THIS PROCESS	BACKUP
1			
2			
3			
4			
5			
6			
7			
8			

4 Steps

One action per row. If a step needs more than a couple of lines, split it.

Example row: Step: "Enter the signed quote into the job tracker and set status to Scheduled." Who: Office manager. Tool: Job tracker. Time: 5 min. Standard: Same business day the quote is signed.

#	STEP (START WITH A VERB)	WHO	TOOL OR SYSTEM	TIME	STANDARD OR NOTE
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					

5 Decisions and exceptions

The points where the path splits, and what to do when something unusual comes up.

#	IF THIS HAPPENS	THEN DO THIS	WHO DECIDES
1			
2			
3			
4			
5			

6 Handoffs

Most process problems show up where work changes hands. Be specific about what 'ready' means.

#	FROM	TO	WHAT GETS PASSED ALONG	HOW THEY KNOW IT'S READY
1				
2				
3				
4				

7 How you'll know it's working

Two or three measures are enough. Pick ones you can check without a big effort.

#	MEASURE	TARGET	CURRENT	HOW IT'S CHECKED
1				
2				
3				

8 Known problems and ideas

Write down the frustrations and workarounds you heard while documenting. Fix the process later; capture it as-is first.

9 Review log

DATE	WHAT CHANGED	CHANGED BY

Before you call it finished

- ☐ Someone who doesn't normally do this work followed it without asking for help.
- ☐ Every step starts with a verb and names who does it.
- ☐ Every handoff says how the next person knows the work is ready.
- ☐ Common exceptions are written down, with who decides.
- ☐ The document is stored where the team already looks for things.
- ☐ The process owner and a review date are set.

Want a second set of eyes?

If your processes live in a few people's heads and you're not sure where to start, we help owners document and tighten the processes that matter most, then build them into the tools you already use.

Book a free consultation at origamicsolutions.com or email Tim Pizanie at tpizanie@origamicsolutions.com.