One repeatable process

A practical worksheet for describing the work as it happens: why it matters, what happens in order, who carries each step, and what moves between people.

01 Purpose and finish

Process name and team

Purpose: What does this process help accomplish, and who does it help?

Start when: What begins the process?

Finish when: What tells you it is complete?

02 Ordered steps and responsibilities

Write each action in order. Name the person or role carrying it and what needs to move next.

Step 01

Action: What happens at this point?

Owner: Who carries this step?

Next: What is needed, produced, or passed along?

Step 02

Action: What happens at this point?

Owner: Who carries this step?

Next: What is needed, produced, or passed along?

Step 03

Action: What happens at this point?

Owner: Who carries this step?

Next: What is needed, produced, or passed along?

Step 04

Action: What happens at this point?

Owner: Who carries this step?

Next: What is needed, produced, or passed along?

Continue the process

Keep going until the usual work is complete. Add another copy of this page if you need more steps or handoffs.

02 Ordered steps and responsibilities (continued)

Step 05

Action: What happens at this point?

Owner: Who carries this step?

Next: What is needed, produced, or passed along?

Step 06

Action: What happens at this point?

Owner: Who carries this step?

Next: What is needed, produced, or passed along?

03 Handoffs

For each change of hands, note what moves and how the next person knows they have it.

Handoff A

From whom, to whom?

What passes between them?

When does it move, and how does the next person know it is ready?

Handoff B

From whom, to whom?

What passes between them?

When does it move, and how does the next person know it is ready?

04 Try one run-through

Walk through the steps with someone who does the work. What would they still need to ask?

A practical operations tool for describing work; not legal or compliance guidance.