

# Process Documentation Checklist



The path to operational excellence begins with a single step. Use this checklist as your compass to navigate the process of creating and maintaining effective process documentation for your service business. Remember, this is a journey, not a destination. Start small, focus on your most critical processes, and continuously iterate to make your documentation work for you. This checklist is your starting point – adapt it, refine it, and make it your own as your business grows and evolves.

## 1. Identify Key Processes

- List all core processes in your business.
  - Prioritize processes based on their impact on:
    - Customer satisfaction
    - Revenue generation
    - Regulatory compliance
- Consider the frequency of each process (high-frequency = high priority).
- Assess the complexity of each process (multiple steps or teams = high priority).
- Identify processes prone to errors or inconsistencies.
- Prioritize recently changed or updated processes.

## 2. Divide the Work

- Assign a process owner for each key process.
- Clearly define roles and responsibilities (RACI matrix).
- Ensure each owner understands their role in creating, maintaining, and updating the documentation.
- Provide training and resources to support documentation efforts.
- Establish a collaborative environment for discussing documentation standards.

## 3. Gather Information

- Interview employees who perform each process.
- Observe the processes in action, if possible.
- Record and transcribe interviews/observations (if permitted).
- Document current processes as they are, not as you want them to be.

## 4. Document the Process

- Choose a combination of formats for each process document:
  - Step-by-step instructions (numbered or bulleted list)
  - Flowcharts or diagrams
  - Checklists
  - Templates (for forms, reports, etc.)
- Write clear, concise instructions in active voice and plain language.
- Incorporate screenshots or short videos for software-based processes.
- Pay attention to the level of detail needed for each process.
- Use version control to track changes over time.

## 5. **Review and Validate**

- Have all relevant stakeholders review the documentation.
- Test the documented process with someone unfamiliar with it.
- Gather feedback from team members and incorporate it.
- Label documents as "beta" while they're still being refined.
- Establish a clear process for requesting changes.

## 6. **Regular Updates**

- Create a schedule for regular reviews and updates.
- Assign responsibility for reviews and updates.
- Monitor the business environment for changes that may necessitate updates.
- Communicate updates to the team regularly.