

Process Documentation Template



Process Name: [Clearly state the name of the process you are documenting. E.g., “Client Onboarding”]

Process ID: [Optional: Assign a unique identifier to the process for easy reference.]

Date Created: [Enter the date the document was initially created.]

Last Updated: [Enter the date of the most recent update.]

Owner: [Job Title of the primary responsible person for this process document.]

Version: [Enter the version number (e.g., 1.0, 1.1, 2.0)]

Purpose and Goals

- **Purpose:** [Briefly describe the goal or objective of the process in one sentence. Start with an action verb like "To..." or "The purpose of this process is to..." Provide the reader with context on why this process matters.]
- **Goals:** [List 2-3 specific, measurable goals for the process. For example, "Reduce client onboarding time by 20%."]

Scope

- **Start:** [Clearly define when the process begins. E.g., "Upon receipt of signed contract from the client."]
- **End:** [Clearly define when the process concludes. E.g., "Successful completion of the initial fire inspection."]
- **Inclusions:** [List the key activities and tasks that are part of this process.]
- **Exclusions:** [List any activities or tasks that are *not* part of this process.]

Process Map/Flowchart

[Insert a visual representation of the process flow. This could be a flowchart, diagram, or other visual aid that clearly illustrates the steps involved. Keep it simple and easy to follow.]

Roles and Responsibilities

[Using the table below, define for each step who is Responsible, Accountable, Consulted and Informed.].

Step	Responsible	Accountable	Consulted	Informed
Step 1				
Step 2				
Step 3				
...				
Step N				

Detailed Steps

[Provide a detailed, step-by-step breakdown of the process. Use clear language, active voice, and numbered lists.]

1. **[Step Name]:** [Describe the first step in detail. Include any relevant information, such as specific tools or software used, decision points, required approvals and any relevant tips.]
2. **[Step Name]:** [Describe the second step in detail.]
3. **[Step Name]:** [Describe the third step in detail.] ... N. **[Step Name]:** [Describe the final step in detail.]

Metrics and KPIs

[List the specific metrics or KPIs that will be used to measure the success and efficiency of the process. Include target values or benchmarks if applicable.]

Exceptions and Escalations

- **Exceptions:** [Describe any situations that might deviate from the standard process flow. Briefly describe how each exception should be handled.]
- **Escalations:** [Specify when and how issues should be escalated if they cannot be resolved within the standard process. Include the names or roles of individuals to contact.]

Additional Information and Resources

[List any additional information, tips, or best practices that may be helpful for those following the process. Include links to relevant templates, forms, or tools.]

Revision History

[Capture revisions in the table below so team members can identify process changes without needing to re-read the entire document.]

Version	Date	Author	Changes Made
1.0			
1.1			