

Process Documentation Template

Capture a repeatable process before you try to automate it. Automating a broken process just breaks things faster.

Process Name: _____

Owner: _____

Last Updated: _____

What Triggers This Process?

What has to happen for this process to start?

Steps, In Order

Write out exactly what happens, the way it actually works today.

- 1.
- 2.
- 3.
- 4.

Who's Involved

List every person or role that touches this process, and their responsibility at each step.

Tools Used

What software or systems does this process rely on?

Where It Breaks Down

Be honest: where does this process usually get delayed, dropped, or done inconsistently?

What "Done" Looks Like

How do you know this process is actually complete?