

Process Documentation Template

A one-page blank form with the nine fields of a process document laid out to fill in.

HOW TO USE THIS TEMPLATE

Fill the fields top to bottom. Name the process and its two boundaries first, then the inputs and outputs, then the steps in order with a role attached to each one. Stop at the point where the work hands off to another team — the rest belongs in their document.

1. The process

FIELD	WHAT GOES HERE	YOUR ANSWER
Process name	The name people already use for this work.	
Owner	The role that maintains this document, not a person's name.	
Starts when	The event that begins the process.	
Ends when	The event that ends it, or the hand-off to another team.	
Inputs	What has to exist before anyone can start.	
Outputs	What exists when the work is done.	

2. Steps

One action per step. Name the result the reader should see before moving on, and put the role that performs it in the last column. Add rows as needed.

#	STEP — THE ACTION, AND THE RESULT TO LOOK FOR	ROLE
1		
2		
3		
4		
5		
6		
7		
8		

TAKE THE SEQUENCE FROM THE WORK, NOT THE MAP

Sit with the people who perform the process, or record the screen while they work, and write the steps from what they do rather than from what the old process map says.

3. Exceptions

Every branch the happy path skips gets a line — the refund over the approval limit, the customer with no account, the file that arrives in the wrong format.

WHEN THIS HAPPENS	WHAT HAPPENS INSTEAD	ROLE

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4. Review

FIELD	WHAT GOES HERE	YOUR ANSWER
Last reviewed	The date this document was last checked against the work — a review date, not a publish date.	
Review cadence	How often it gets checked again, and the change that triggers an early review.	

Before you publish

☐ Every field above carries a real value — no blanks left in the form.

☐ The document stops at the hand-off; nothing in it belongs to another team's process.

☐ Each step has one action and one role.

☐ Someone who has never done the work ran the process from this document, and every step they had to ask about has been rewritten.

☐ The document lives in one central, searchable location where the work happens.

☐ The owner is named in the header and the review date is set.