WORKING PROCEDURE TEMPLATE

[Company/Project Name]

Procedure Library

What Is This Document?

Working Procedures are step-by-step instructions for recurring tasks. They're the "how-to" documentation that allows anyone to execute a task consistently, without relying on tribal knowledge or guesswork.

The Rule: If you do something more than twice, document it.

Procedure Index

List all procedures here for quick reference

ID	Procedure Name	Category	Owner	Last Updated
WP-001	[Name]	[Category]	[Owner]	[Date]
WP-002	[Name]	[Category]	[Owner]	[Date]
WP-003	[Name]	[Category]	[Owner]	[Date]

PROCEDURE TEMPLATE

Copy everything below this line for each new procedure

WP-[XXX]: [Procedure Name]

Category: [Operations / Sales / Customer Service / Finance / Technical / Administrative]
Owner: [Name/Role]
Version: 1.0
Created: [Date]

Last Updated: [Date]
Estimated Time: [X minutes/hours]

Purpose

Why does this procedure exist? What outcome does it produce?

> [1-2 sentences describing the goal of this procedure]

When to Use

What triggers this procedure?

- [ ] [Trigger condition 1]
- [ ] [Trigger condition 2]
- [ ] [Trigger condition 3]

Prerequisites

What must be in place before starting?

Access Required:

- [ ] [System/tool access]
- [ ] [Account/credentials]

Information Needed:

- [ ] [Data point 1]
- [ ] [Data point 2]

Tools/Resources:

- [ ] [Tool 1]
- [ ] [Tool 2]

Procedure Steps

Phase 1: [Phase Name]

Step	Action	Details	Checkpoint
1.1	[Action verb + object]	[Specific details, locations, values]	[How to verify completion]
1.2	[Action verb + object]	[Specific details]	[Verification]
1.3	[Action verb + object]	[Specific details]	[Verification]

Phase 2: [Phase Name]

Step	Action	Details	Checkpoint
2.1	[Action verb + object]	[Specific details]	[Verification]
2.2	[Action verb + object]	[Specific details]	[Verification]
2.3	[Action verb + object]	[Specific details]	[Verification]

Phase 3: [Phase Name]

Step	Action	Details	Checkpoint
3.1	[Action verb + object]	[Specific details]	[Verification]
3.2	[Action verb + object]	[Specific details]	[Verification]
3.3	[Action verb + object]	[Specific details]	[Verification]

Decision Points

Where might the procedure branch based on conditions?

Decision Point 1: [Condition]

- If [condition A]: Go to Step [X.X]

- If [condition B]: Go to Step [Y.Y]
- If [condition C]: Escalate to [Role/Person]

Decision Point 2: [Condition]

- If [condition A]: [Action]
- If [condition B]: [Action]

Troubleshooting

Problem	Likely Cause	Solution
[Common issue 1]	[Cause]	[Fix]
[Common issue 2]	[Cause]	[Fix]
[Common issue 3]	[Cause]	[Fix]

Escalation: If issue persists after troubleshooting, contact [Name/Role] via [Method].

Quality Checks

How do you verify the procedure was completed correctly?

- [ ] [Quality check 1]
- [ ] [Quality check 2]
- [ ] [Quality check 3]

Acceptable Outcome: [Describe what "done correctly" looks like]

Unacceptable Outcome: [Describe what indicates a problem]

Related Procedures

- [WP-XXX: Related Procedure Name]
- [WP-XXX: Related Procedure Name]

Changelog

Version	Date	Author	Changes
1.0	[Date]	[Name]	Initial version

Notes for Improvement

Space for ongoing observations about this procedure

- [Observation/improvement idea]
- [Observation/improvement idea]

SAMPLE PROCEDURES

Example procedures to illustrate the format

WP-001: Weekly Metrics Review

Category: Operations
Owner: [Your Name]
Version: 1.0
Created: [Date]
Last Updated: [Date]
Estimated Time: 30 minutes

Purpose

> Review key business metrics weekly to identify trends, problems, and opportunities before they become critical.

When to Use

- [ ] Every Monday morning between 8:00-9:00 AM
- [ ] First business day after returning from vacation
- [ ] When requested by stakeholder

Prerequisites

Access Required:

- [ ] Analytics dashboard login
- [ ] Financial reporting tool access

Information Needed:

- [ ] Previous week's targets (from Strategic Objective)

Tools/Resources:

- [ ] Metrics tracking spreadsheet
- [ ] Calculator

Procedure Steps

Phase 1: Data Collection

Step	Action	Details	Checkpoint
1.1	Open analytics dashboard	Navigate to [URL] and log in	Dashboard loads correctly
1.2	Set date range	Select previous Monday through Sunday	Date range confirmed in header
1.3	Export weekly summary	Click "Export" → Select CSV format	File downloads to Downloads folder

Phase 2: Analysis

Step	Action	Details	Checkpoint
2.1	Compare to targets	Open targets spreadsheet alongside export	Both files open
2.2	Calculate variances	For each metric: (Actual - Target) / Target × 100	Variance column populated
2.3	Flag outliers	Mark any variance > 10% in red	Outliers visually identified

Phase 3: Documentation

Step	Action	Details	Checkpoint
3.1	Record findings	Add new row to Weekly Review Log	Date and metrics entered
3.2	Note action items	List any required follow-ups	Action items have owners
3.3	Archive export	Move CSV to Archive/YYYY-MM folder	File in correct location

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Quality Checks

- [ ] All 5 key metrics reviewed
- [ ] Variances calculated and documented
- [ ] Action items assigned to specific owners with deadlines
- [ ] Review log updated

WP-002: New Client Onboarding

Category: Customer Service
Owner: [Your Name]
Version: 1.0
Created: [Date]
Last Updated: [Date]
Estimated Time: 45 minutes

Purpose

> Systematically onboard new clients to ensure consistent experience and capture all required information.

When to Use

- [ ] New client signs contract/agreement
- [ ] Existing client adds new project/service

Prerequisites

Access Required:

- [ ] CRM system
- [ ] Email system
- [ ] Project management tool

Information Needed:

- [ ] Signed agreement
- [ ] Client contact information
- [ ] Project scope details

Procedure Steps

Phase 1: System Setup

Step	Action	Details	Checkpoint
1.1	Create CRM record	New Contact → Enter all fields from agreement	Record ID generated
1.2	Create project folder	Structure: Clients/[Name]/[Year]/[Project]	Folder accessible
1.3	Set up billing	Add to invoicing system with payment terms	Invoice template ready

Phase 2: Communication

Step	Action	Details	Checkpoint
2.1	Send welcome email	Use template "Welcome-New-Client-v2"	Email sent, logged in CRM
2.2	Schedule kickoff call	Within 3 business days of signing	Calendar invite sent
2.3	Share access credentials	Project portal login details	Client confirms access

Phase 3: Internal Notification

Step	Action	Details	Checkpoint
3.1	Notify team	Post in #new-clients channel	Team acknowledged
3.2	Assign resources	Update resource allocation sheet	Resources confirmed
3.3	Add to dashboards	Include in active client metrics	Appears in reports

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Decision Points

Decision Point 1: Client Size

- If annual value > $50K: Assign dedicated account manager
- If annual value $10K-$50K: Assign to team lead
- If annual value < $10K: Standard onboarding only

Quality Checks

- [ ] All required fields populated in CRM
- [ ] Welcome email sent within 24 hours of signing
- [ ] Kickoff call scheduled within 3 business days
- [ ] Team notified and resources assigned

"*Every time you document a procedure, you're building an asset that works without you.*"
— Sam Carpenter, Work the System