

WP-000: Procedure for Creating Procedures

Category: Meta / Operations

Owner: [Your Name]

Version: 1.0

Created: [Date]

Last Updated: [Date]

Estimated Time: 20-45 minutes per procedure

Purpose

Systematically capture and document any recurring task into a reusable, delegatable procedure. This is the master template that ensures consistency across all procedure documentation.

When to Use

- ☐ You've done the same task 3+ times
 - ☐ You're about to delegate a task to someone else
 - ☐ You just solved a problem and want to prevent recurrence
 - ☐ You notice yourself thinking "I should remember how I did this"
 - ☐ A task takes longer than it should due to figuring it out each time
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The 80/20 Rule for Procedures

Document the 20% of tasks that consume 80% of time or cause 80% of problems.

Priority order for what to document first:

1. Tasks you do daily
 2. Tasks that cause errors when done wrong
 3. Tasks you'll eventually delegate
 4. Tasks with multiple steps you sometimes forget
 5. Tasks done infrequently but critical when needed
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Procedure Steps

Phase 1: Capture (Do this WHILE performing the task)

Step	Action	Details	Checkpoint
1.1	Open capture tool	Voice memo, notes app, or scratch document	Tool ready to record
1.2	State the task name	"I am now doing [task name]"	Task clearly identified
1.3	Narrate as you work	Speak or type each action as you perform it: "First I open X, then I click Y"	Real-time capture happening
1.4	Note decision points	When you make a choice, say: "Here I decided X because Y"	Decisions documented
1.5	Record problems	If something goes wrong, document the problem and fix	Troubleshooting captured
1.6	Mark completion	"Task complete. The outcome is [result]"	End state defined

Critical: Capture during the task, not after. Memory fades details immediately.

Phase 2: Structure (15-20 minutes after task completion)

Step	Action	Details	Checkpoint
2.1	Create new procedure file	Copy template from 03-Working-Procedures.md	File created with ID
2.2	Fill header information	Category, Owner, Estimated Time	Header complete
2.3	Write Purpose statement	One sentence: "This procedure ensures [outcome] by [method]"	Purpose is specific and measurable
2.4	Define triggers	List all conditions that initiate this procedure	Triggers are unambiguous
2.5	List prerequisites	Access, information, tools needed before starting	Someone else could gather these

Phase 3: Write Steps (Core documentation)

Step	Action	Details	Checkpoint
3.1	Group into phases	Cluster related steps into 2-5 logical phases	Phases have clear boundaries
3.2	Write each step	Format: [Action verb] + [Object] + [Location/Details]	Steps start with verbs
3.3	Add checkpoints	For each step: "How do I know this is done correctly?"	Every step is verifiable
3.4	Insert decision points	Where does the procedure branch? What are the conditions?	Branches are explicit
3.5	Add troubleshooting	What commonly goes wrong? What's the fix?	Top 3 problems covered

Step Writing Formula:

BAD: "Handle the email"

GOOD: "Reply to customer email using Template-Response-A within 4 hours of receipt"

BAD: "Update the system"

GOOD: "Enter invoice number in Field 3B of the Accounting Dashboard, then click Save"

Phase 4: Validate

Step	Action	Details	Checkpoint
4.1	Read aloud	Read the entire procedure out loud	No confusing phrases
4.2	Check verb strength	Every step must start with actionable verb	No passive voice
4.3	Identify assumptions	What knowledge does this assume? Add to Prerequisites if needed	Novice could follow
4.4	Time estimate	Based on actual task duration, set realistic time	Time is accurate
4.5	Add to Procedure Index	Update master index in 03-Working-Procedures.md	Procedure is findable

Phase 5: Test (Critical for delegation)

Step	Action	Details	Checkpoint
5.1	Execute from document	Perform the task using ONLY the written procedure	No mental gap-filling
5.2	Note gaps	Where did you use knowledge not in the document?	Gaps identified
5.3	Update procedure	Add missing details discovered in 5.2	Document updated
5.4	Have someone else test	Another person follows the procedure	They complete without asking questions
5.5	Final revision	Incorporate feedback from tester	Version incremented

Quality Checklist

Before marking a procedure "complete," verify:

- ☐ **Trigger is clear** — Someone knows exactly when to use this
 - ☐ **Prerequisites are complete** — Nothing assumed or missing
 - ☐ **Steps are atomic** — Each step is one action, not multiple
 - ☐ **Verbs are specific** — Click, Enter, Select, Send, Open (not Handle, Process, Deal with)
 - ☐ **Checkpoints exist** — Every step has a way to confirm completion
 - ☐ **Decision points are explicit** — All "if/then" situations documented
 - ☐ **Troubleshooting covers top 3** — Most common problems addressed
 - ☐ **Time estimate is realistic** — Based on actual execution
 - ☐ **A stranger could follow it** — No tribal knowledge required
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Procedure Naming Convention

Format: WP-[XXX]-[Category]-[Name]

Categories:

- OPS — Operations / Daily workflows
- FIN — Finance / Accounting
- CUS — Customer / Client facing
- TEC — Technical / Development
- ADM — Administrative
- SAL — Sales / Business development
- QA — Quality Assurance

Examples:

- WP-001-OPS-Weekly-Metrics-Review
 - WP-012-CUS-Client-Onboarding
 - WP-023-TEC-Deploy-To-Production
 - WP-034-QA-Device-Test-Cycle
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Storage and Organization

File Location: [Project]/Procedures/[Category]/WP-XXX-Name.md

Structure:

```
/Procedures
/OPS
  WP-001-OPS-Weekly-Review.md
  WP-002-OPS-Daily-Standup.md
/CUS
  WP-010-CUS-Client-Onboarding.md
/TEC
  WP-020-TEC-Deployment.md
index.md (master list of all procedures)
```

Maintenance Triggers

Update a procedure when:

- ☐ The task itself changes
 - ☐ Tools or systems change
 - ☐ Someone reports confusion or error
 - ☐ You notice yourself deviating from the written steps
 - ☐ Quarterly review (minimum)
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Time Investment Guide

Procedure Complexity	Capture Time	Documentation Time	Total Investment
Simple (5-10 steps)	5 min	15 min	20 min
Medium (10-20 steps)	10 min	25 min	35 min
Complex (20+ steps)	15 min	30-45 min	45-60 min

ROI Calculation: If a procedure saves 10 minutes per occurrence and you do it weekly, a 30-minute documentation investment pays back in 3 weeks, then saves 8+ hours annually.

Quick-Start: Minimum Viable Procedure

When time is short, capture at minimum:

- Purpose** — One sentence
- Trigger** — When to do this
- Steps** — Numbered list, verb-first
- Done state** — How you know it's complete

Expand later. A rough procedure is infinitely better than none.

Anti-Patterns to Avoid

Don't Do This	Do This Instead
Document after the fact from memory	Capture in real-time while doing
Write paragraphs of explanation	Write numbered steps with verbs
Assume context	State prerequisites explicitly
Document everything at once	Start with highest-frequency tasks
Perfect the document before using	Use immediately, improve iteratively
Keep procedures in your head	If it's not written, it doesn't exist

Integration with Projects

For RideCareShare: Focus on user-facing processes first (onboarding, ride matching, donation flow)

For STEBEQ: Your procedures become product examples — document your own workflow automation as case studies

For QA Work: Test procedures, device setup, bug reporting workflows

"The procedure for creating procedures is the most important procedure you'll ever write. Everything else flows from it."