



CASE STUDY

SOP & Workflow Documentation System

Turning operational knowledge into clear, usable processes

CLARIFY



DOCUMENT



IMPLEMENT

Process Design • SOPs • Workflow Clarity • Staff Adoption

THE OPERATIONAL CHALLENGE

When the Process Lives in People's Heads

1

Different people follow different steps

Execution varies depending on who is doing the work.

2

Critical knowledge is informal

Staff rely on memory, experience, or asking the “right person.”

3

Ownership isn't always clear

Handoffs and decision responsibilities create confusion.

4

Documentation doesn't match reality

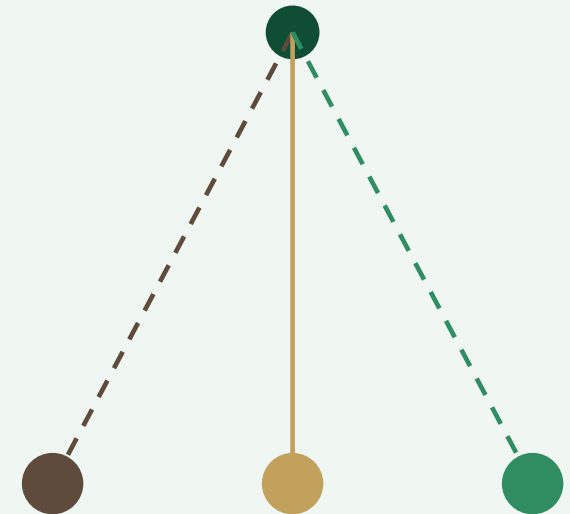
Existing procedures may be incomplete, outdated, or difficult to use.

5

New staff have to figure things out

Learning the process depends too heavily on individual support.

SAME START. DIFFERENT PATHS.

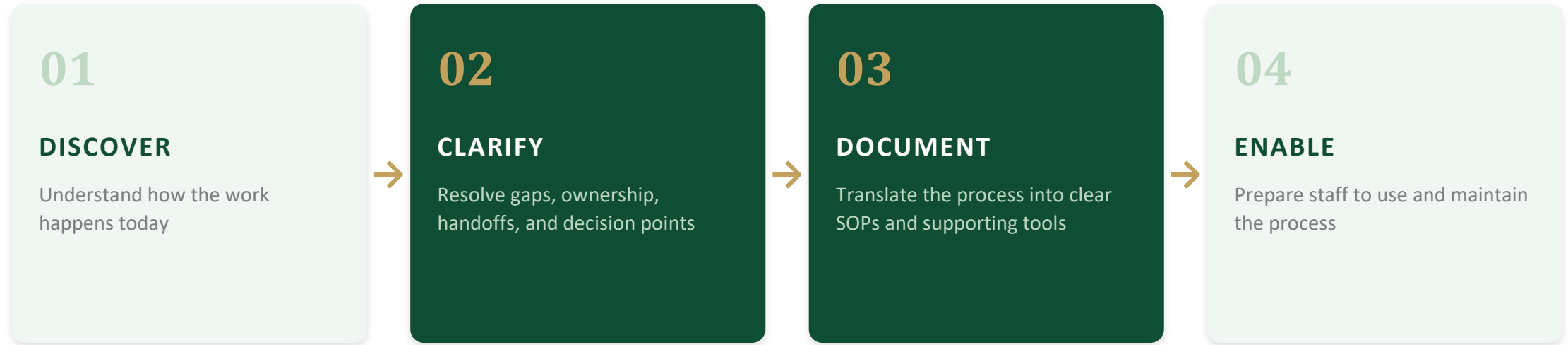


Three staff. Three different outcomes.

*Before documenting the process, we first need to understand how the work actually happens. **That is the differentiator.***

THE APPROACH

Don't Document the Friction. Fix It First.



QUESTIONS WE CONSIDER AT EVERY STAGE

Who owns it?

What triggers it?

What happens next?

Where are decisions made?

What tools are used?

What happens when something goes wrong?



More Than an SOP Document

1

Process Maps

Visualize steps, handoffs, and decision points

2

SOPs

Document the agreed-upon operating process

3

Roles & Ownership

Clarify who performs, approves, and receives work

4

Checklists & Job Aids

Make frequent processes easier to execute

5

Templates & Tools

Standardize recurring work where appropriate

6

Implementation Support

Help move the documented process into actual use

The documentation should make the work easier to perform—not simply prove that a procedure exists.

From Institutional Knowledge to Shared Practice



***The goal:** critical processes that are easier to understand, teach, follow, and improve.*

