



Mastering Process in 10 Days

Exercise 1: Core Process

Process Name

How should everyone refer to this process?

Process Description

Briefly describe the scope of this process.

Exercise 2: Major Steps

Steps in Process

Identify 5-10 major steps in this process.

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Exercise 3: Instructions

Existing Resources

List relevant existing resources for your process.

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Media Selection

What are the most effective media formats for conveying information in this process?

- ☐ Written step-by-step documentation
- ☐ Diagrams, flowcharts
- ☐ Screenshots, screen recordings
- ☐ Narrated tutorial videos
- ☐ Slides

- ☐ Audio guides
- ☐ Recorded webinars / virtual classes
- ☐ Data sheets & graphs
- ☐ ...
- ☐ ...



Exercise 4: Document

Subject Matter Experts

Who will help you document these instructions?

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Exercise 5: Package

Access Levels

Which teams should be able to read content, which should be able to write and edit?

Read:

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Write and edit:

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Exercise 6: Ownership

Process Owner Name

Who will be accountable for reviewing and updating the process?

Review Cycle

How often does the process need to be reviewed?

- ☐ Monthly
- ☐ Every 3 months
- ☐ Every 6 months
- ☐ Every 12 months

Exercise 7: Training

Training Type

How are you going to train your team members?

- ☐ Classroom
- ☐ Online
- ☐ On the job
- ☐ Other:

Training Reinforcement

How often should team members be re-enrolled into training?

- ☐ Monthly
- ☐ Every 3 months
- ☐ Every 6 months
- ☐ Every 12 months
- ☐ ...

Exercise 8: Test

Test Type

How are you going to test the knowledge of your team members?

- ☐ Classroom
- ☐ Online
- ☐ On the job
- ☐ Other:

Test Reinforcement

How often should team members be re-enrolled into tests?

- ☐ Monthly
- ☐ Every 3 months
- ☐ Every 6 months
- ☐ Every 12 months
- ☐ ...

