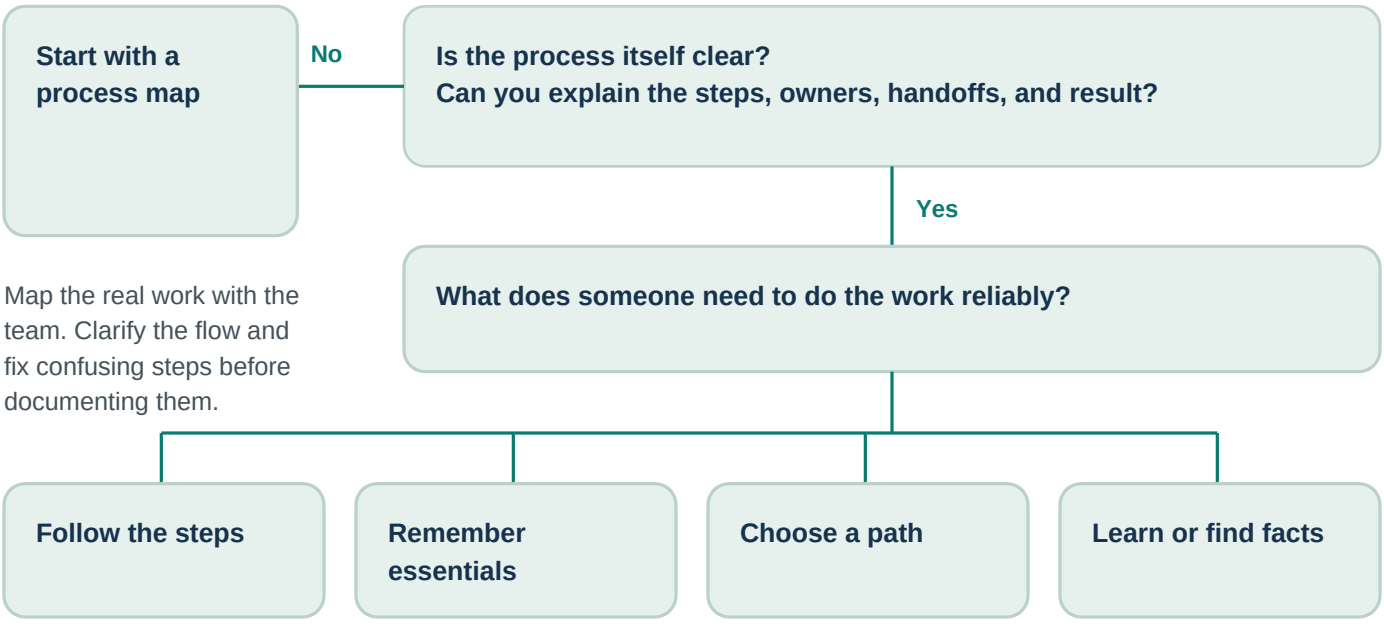
What does this process need?

Choose support that helps people do the work.

Use this guide after tracing one real process. Start with the gap you observed, then choose the smallest useful combination of tools. More documentation is only helpful when people can use it.



Map the real work with the team. Clarify the flow and fix confusing steps before documenting them.

SOP

Explain the sequence, responsibility, and expected result.

Checklist

Prompt the critical checks or actions people might miss.

Decision tree

Show what to do when conditions, exceptions, or approvals differ.

Training guide or quick reference

Teach a skill, or make a known answer easy to find.
See page 2.

When seeing the action would help

Add a short video for a demonstration, such as a screen-based task or hands-on technique. Pair it with a written guide or checklist so people can find the steps without replaying the whole video.

A map can reveal unclear work. A document alone will not resolve an ownership, capacity, or process design problem.

Match the tool to the gap

Choose a primary tool. Add a supporting format only when it solves a different need.

Tool	What is missing	A practical example
Process map	We cannot clearly explain how work moves.	Map a customer request from arrival through assignment, delivery, and follow-up.
SOP	We need clear instructions for a repeatable task.	Explain how to set up a new client, including ownership, inputs, steps, and completion checks.
Checklist	We know how, but important actions get missed.	List the required checks before a deliverable is sent to a customer.
Training guide	Someone needs to learn and practice the work.	Teach a new team member how to handle a request, with examples, practice, and feedback.
Decision tree	The next step depends on conditions or an exception.	Show when a request can proceed, needs more information, or requires an approval.
Quick reference	We know the work, but facts are hard to find.	Keep approved escalation contacts, status definitions, or common answers in one place.
Video	The action is easier to understand when demonstrated.	Show a software task or technique. Link to a written summary and the current source of truth.

Useful combinations

SOP + checklist: explain the work, then check the essentials.
Training guide + video: demonstrate, practice, and confirm understanding.
Process map + decision tree: show the flow, then clarify exceptions.

Choose what you will try

Test the resource with someone who does the work. Watch where they pause, ask questions, or use a workaround, then revise it with them.

Which process are we supporting?

What gap did we observe? Use a real example.

Which primary tool will address that gap, and why?

Do we need a second format? What different need would it serve?

Who will create it, and who will test it with a real task?

Where will the current version live, and who will keep it accurate?

What would show that it helped? When will we review it?

Before you share it

Check that the resource matches the actual process, includes the important exceptions, and is easy to find. If AI helps draft it from notes or a transcript, a person who understands the work should verify the steps and decisions before use.

Need help deciding what the process needs?
Start with our inquiry form at businessprogresssolutions.com/consultation/