03 · PROCESSES · PRACTICAL GUIDE

What should you document first?

Not everything needs a process or procedure.

This guide helps you identify the things that are worth documenting first, especially the work that's repeated, inconsistent or always coming back to you. The goal is not to write everything down. It is to write down the few things that make the biggest difference to how smoothly the business runs.

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01 **START WITH WORK THAT IS…**

If a task ticks two or more of these, it is a strong candidate to document first.

Repeated

It happens every day, week or month. Small time savings add up quickly, and a written version means it gets done the same way each time.

Inconsistent

Different people do it differently, or the result depends on who is working. Customers notice, and so does your team.

Always coming back to you

People ask you how to do it, or wait for you to do it. Documenting it is the first step to handing it off.

Costly if missed

A mistake means a compliance problem, a lost customer, a payroll error or rework. These are worth getting right on paper.

02 YOUR SHORTLIST

List the tasks that interrupt you or your team most often. Tick every column that applies, then start with the row that has the most ticks.

TASK	REPEATED	INCONSISTENT	COMES BACK TO ME	COSTLY IF MISSED

03 DOCUMENT JUST ENOUGH

A useful process fits on a page. For each task on your shortlist, capture:

1. **What it is and when it happens**
   One line. The trigger that starts it (a new customer, the end of the month, a staff absence).
2. **Who is responsible**
   The role, not the person, so it still works when people change.
3. **The steps, in order**
   Short, numbered, and written for someone doing it for the first time. Include where things are kept and which tools are used.
4. **What "done" looks like**
   How you know it worked, and what to do if something goes wrong or needs approval.

Then use it. Ask the person who does the task to follow the written version once, fix what didn't match, and keep it somewhere the whole team can find.

Not sure where to start, or don't have the time to write it down?

TMA can help you identify what is worth documenting, build practical processes, procedures and tools your team will actually use, and support you as they are put into practice.

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