MONDAY SOLUTIONS GROUP

THE MONDAY SOLUTION · FREE WORKBOOK

The Process Capture Worksheet

Get the work out of your head and into your team's hands — one process at a time.

9 simple steps · About 30 minutes



How to Use This Worksheet

This worksheet walks you through documenting **one process** in about 30 minutes. You don't need special software. You need a pen, a stack of sticky notes, and one honest conversation with yourself.

THREE RULES BEFORE YOU START

1 Done beats perfect.
Your first draft is a starting line, not a finish line. Expect to refine it three to ten times.

2 Ask "What's next?" — not "How?"
The how will come later. Right now you're capturing the order of the work.

3 Write it for someone who can't read your mind.
If a capable new person couldn't follow it without calling you, it isn't finished yet.

> **"If it's not documented, it doesn't exist."**

INSIDE: THE 9 STEPS

1. Ask the 30-Day Question
2. Start at the End
3. Brain-Dump With "What's Next?"
4. Sort Into Three Phases
5. Write It in Order
6. Run the Hand-Off Test
7. Strengthen the Weakest Link
8. Ask AI to Critique It
9. Store It and Schedule the Review

STEP 1

1 Ask the 30-Day Question

If you disappeared for 30 days — no calls, no texts — what would break first? List the three things that would stall without you.

#	What would break?	Who feels it first?
1		
2		
3		

You don't have to document everything at once. Start with your top **play** — the one process that runs most often or costs the most when it goes wrong. Common first plays: onboarding a new customer, training a new hire, opening or closing the building, preparing a proposal, or running a weekly event.

My first process to document: _____

STEP 2

2 Start at the End

All planning begins at the end. Before you list a single step, name the finished result.

Process name: _____

Finished result (what "done" looks like): _____

_____

Process owner: _____ **Date:** _____

Example: "A new client has signed, paid, and received their welcome packet within 48 hours of saying yes."

STEP 3

3 Brain-Dump With "What's Next?"

Grab your sticky notes. Write **one step per note** — never two. Start with the first thing that happens and keep asking, "What's next?"

- Don't worry about order yet. If a later step pops into your head, write it down anyway.
- Don't stop to decide how, who, or how much. Just capture what happens.
- Aim for 15 to 30 notes. More is better at this stage.

Shortcut: Do the work once while recording yourself on your phone. Talk it out like you're training someone next to you. Then pull the steps from the recording.

STEP 4

4 Sort Into Three Phases

Spread your notes into three columns on the table or wall. They don't need to be in perfect order inside each column — just in the right phase.

Early Getting started	**Middle** Doing the work	**Late** Finishing and following up

STEP 5

5 Write It in Order

Now put the steps in sequence. Number every step so your team can say "We're stuck on step 7" instead of "That thing after the email." Then rate how well each step works today, from 0 (broken) to 10 (runs perfectly every time).

#	Step (what happens)	Who does it	When / how long	Works (0–10)
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				

Last step: How does the end lead back to the beginning? (A finished client becomes a referral. A finished event becomes next year's plan.) Healthy processes circle back and grow.

STEP 6

6 Run the Hand-Off Test

Walk a team member, peer, or friend through your process step by step. Their job is to ask questions until they could do it without you. Every question they ask reveals a missing step.

What they asked	What I need to add or clarify

STEP 7

7 Strengthen the Weakest Link

A process is only as strong as its weakest step. Go back to your ratings in Step 5.

My lowest-rated step: # _____

Why it breaks down: _____

One change that would raise it two points: _____

Then build an **"Oops List"** — what usually goes wrong and what to do when it does.

When this goes wrong...	Do this...

STEP 8

8 Ask AI to Critique It

Type or paste your process into ChatGPT, Claude, Gemini, or your favorite AI tool with this prompt:

COPY THIS PROMPT

"Here is my process for [process name]. The finished result is [end result]. Here are my steps: [paste steps]. Critique this process. Tell me what steps are missing, what is unclear to someone new, and where it could be simplified or automated. Keep it simple enough to hand to a new team member."

Then **read it, edit it, and make it yours.** AI is a thought partner, not the author. The final version should sound like you and match how your organization actually works.

STEP 9

9 Store It and Schedule the Review

A process nobody can find is a process nobody follows.

- ☐ **Where it lives:** _____ shared drive, training platform, binder
- ☐ **Who has access:** _____
- ☐ **Handed off to (name and date):** _____
- ☐ **Next review date:** _____ once a quarter
- ☐ **Next process to document:** _____

At each review, ask your team one question: "Which step here no longer makes sense?"

“If it lives only in your head, it leaves when you leave.”

You just did what most leaders never do: you got one process out of your head and into your team’s hands. Now pick the next one.

The Monday Solution
support@beginmonday.com

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