



Process Documentation

Use these templates to outline your processes, starting with the problem each solves. [Learn more](#) about these templates.

Process Documentation Examples

Check out these great [templates](#) to jumpstart your process documentation and create balance in your life. 🌂

- [Support Policies & Procedures](#)
 - [Intercom's Strategies to Support Remote Work](#)
 - [Remote Meeting Etiquette](#)
 - [Guide to Your First Weeks!](#)
 - [12 Expert-Designed Change Management Templates](#)
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Process Documentation Template

[Process Name]

Purpose:

[In one sentence, explain the what and why behind this process. *Example: How to service customers who call in with a billing question so they're happier after their call than before.*]

Related resources:

- [Insert related Guru Card process documentation links, including embedded Microsoft Office 365 and Google Drive files]
- [Insert additional related processes]



- [Insert additional related processes]
- Example: [Brand Voice Guidelines for Support Reps](#)

Summary:

[In one sentence, explain the appropriate way to use this Card's knowledge so the user knows how it relates to the above purpose. Example: The Customer Success Rep (CSR) greets the customer with [Brooklinen's Brand voice and tone](#) and aims to deliver support that delights, not just satisfies the customer.]

How to [insert process name here]:

[Add your step-by-step instructions here. Ensure each step is detailed and assigned an owner. Include any service-level agreement (SLA) turnaround time guidelines and quality standards.]

Step	Owner
1. Step one instructions here.	Name
2. Step two instructions here.	Name
3. Step three instructions here.	Name
4. Step four instructions here.	Name
5. Step five instructions here.	Name

Process owner:

For more information, contact [insert contact information of the process owner].