Master Processes, Multiply Results

playbook

TIME TO READ THIS LEARNING TOOL: 15 MIN.

TIME TO IMPLEMENT: 10-12 WEEKS

Imagine walking into an office, job site, or shop floor where everything just works. The right people are in the right place, doing the right things, at the right time. No confusion, no bottlenecks, no wasted effort or drama—just a team moving in perfect harmony toward a common goal. This isn't a fantasy or an unreachable ideal. It's what happens when process is done right.

At its core, process is about clarity. It's about turning the chaos of daily operations into a clear, repeatable system that works every time. Process isn't just paperwork or bureaucracy. It's the engine that drives your business forward. And when your engine runs smoothly, you can focus on what matters most: growth, innovation, and delivering real results.

But let's be honest. Tackling process can feel daunting. It's easy to get bogged down in endless details, unclear priorities, and competing opinions. That's why so many teams either avoid it altogether or settle for half-measures that don't stick.

We know this because we've been there. We've seen how process, done poorly, can frustrate teams and stall progress. But we've also seen how process, done well, can transform entire organizations. That's why we created The Process Roadmap—a step-by-step guide designed to help you cut through the noise, focus on what matters, and create systems that deliver lasting results.



First of all, this isn't theory or fluff. It's a practical, tested approach to process improvement that we've honed over 20 years of real-world experience with thousands of highly successful small and medium sized companies. We've seen it work for teams big and small, across industries, in every kind of challenge you can imagine.

What you'll find in these pages is more than a checklist. It's a proven framework that:

- Pinpoints key priorities to maximize impact and results.
- Breaks down processes into actionable, easy-to-follow steps.
- Preserves team expertise by turning insights into practical tools.
- Provides a repeatable framework for continuous improvement and long-term success.

YOU'RE NOT ALONE

We're here to walk you through this, step by step. Whether you're tackling a process for the first time or refining systems that already exist, this guide will give you the confidence, tools, and direction you need. By the time you finish this book, you won't just understand the value of process—you'll have the tools to build processes that stick. And if you need more help - we can bring a Process Advisor into your company to drive this project forward. Just contact us and we'll discuss it.

In the meanwhile, let's get started. Together, we're going to eliminate ambiguity, streamline your operations, and create systems that drive real, measurable results. Let's build something that works—not just for today, but for the long haul. Because when you get process right, everything changes.

First up, let's talk about the Elephant in the Room: Time Management



HOW TO MANAGE YOUR TIME (AND OTHERS') TO DRIVE PROCESS SUCCESS

One of the biggest threats to process projects isn't technical—it's time. The person leading the charge is often already wearing multiple hats, managing a full workload while trying to drive critical change. Sound like you? Without a deliberate plan to manage time and resources, even the best process initiatives risk stalling out.

SET REALISTIC EXPECTATIONS

Before you dive in, set clear expectations for the project timeline and your own time commitment. A well-executed process improvement initiative typically unfolds in three stages.

In total, you're looking at roughly 12 weeks from start to launch to tackle 2-3 Playbooks.

PLANNING

This includes identifying priorities, selecting goals, and assembling the team (1-2 weeks).

DEVELOPMENT

Capturing Subject Matter Experts' (SMEs) wisdom, building the playbooks, and preparing for launch (1-2 weeks) per playbook.

IMPLEMENTATION

Rolling out the process, training the team, and making adjustments based on feedback (3 weeks).

MAKE WEEKLY TIME COMMITMENTS

To keep things realistic, aim to dedicate 3-5 hours per week to the project. This allows for meaningful progress without derailing your other responsibilities.



PRO TIP: Block out time on your calendar. Treat it as sacred—your process time is just as important as any meeting or deadline.

STAY VISIBLE

Securing the time and resources you need requires clear, consistent communication with leadership. Here's how to manage up effectively.

ALIGN ON PRIORITIES

Use the scorecard to demonstrate how the process aligns with top-line or bottom-line goals. Leadership is more likely to support your efforts if they see the direct impact on business performance.

REQUEST RESOURCES STRATEGICALLY

Clearly outline what you need—whether it's time, people, or tools—and tie each request to the project's success.

• Example: "To stay on track, I'll need five hours a week from our SME in Operations for the next couple of weeks."

PROVIDE UPDATES

Keep leadership informed of progress. Highlight wins and milestones to maintain their buyin and support.

PROTECT YOUR ENERGY

Process can be overwhelming, especially when you're the one accountable. While you may not have a team to delegate to, you can still ask for help:

ASK FOR HELP STRATEGICALLY

- SMEs: Request focused input on key steps. Example: "Can we meet for 30 minutes to clarify step three?"
- **Leadership**: Escalate roadblocks or request temporary support. Example: "Could we adjust my workload during this project?"
- Peers: Tap into their experience for quick brainstorming or advice.

PRIORITIZE RUTHLESSLY

• Focus on tasks with the biggest impact. Use the Pareto Principle (80/20 rule) to eliminate distractions and stay aligned with project goals.

CREATE BREATHING ROOM

- Block uninterrupted time for the project and take micro-breaks to recharge.
- These strategies ensure you stay focused, energized, and on track without burning out.

IT'S TIME TO TACKLE IT

Time is often the silent killer of process documentation and roll out projects. As the person accountable for success, you're likely juggling a full workload while spearheading critical change. Without a clear plan to manage your time and resources, even the best intentions can lead to stalled progress, frustration, and fatigue.

The good news? With the right approach, you can stay ahead of these challenges and lead your project confidently. Start today. Define priorities. Make a plan, protect your time, and lean into the support around you. With clarity and focus, you're not just improving processes—you're buying back your own time that you spend on repeating yourself and putting out endless fires.

Let's start by setting those priorities.

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STEP ONE: PRIORITIES FIRST

When you're staring down a new process project, it's easy to feel overwhelmed. Where do you start? What deserves your attention first? The answer lies in the key metrics—the numbers that reveal the real story of your business performance. These metrics, often found in your Scorecards, are like a road sign pointing you to the areas where the biggest gains can be made.

By focusing your efforts on metrics that impact your top line (revenue) or bottom line (profit), you ensure that every ounce of time and energy spent on the process project delivers measurable results. And when the results matter—when they're real and tangible—the entire company gets behind the initiative. People are excited to rally around something that reduces pain points or captures exciting new opportunities.

LET'S BREAK IT DOWN

START WITH THE SCORECARD

Think of the scorecard as the heartbeat of your business. It tells you where goals are being met—and more importantly, where they're falling short. Are you missing sales targets? Is customer retention sliding? These are your breadcrumbs, leading you to the processes that need attention. Collaborate with your Leadership Team to identify the areas of greatest concern or opportunity. Their insights can help prioritize the most urgent or impactful issues, ensuring your efforts align with strategic goals and deliver maximum value.

INVOLVE YOUR VISIONARY

Every organization has someone who sees the big picture—the Visionary. This is the person who has an innate sense of what's urgent and what's just noise. Their insights help you prioritize efforts. They may not be in the weeds of daily operations, but they know where the opportunities and risks lie. Bring them into the conversation early. Here's a **quick guide** to help you and your leadership team prioritize your playbooks!

Wait—your Visionary isn't interested in being part of the conversation? That's something to address right away. If the Visionary disengages during this critical planning phase, it often leads to challenges in securing the resources, time, and visibility your project needs to succeed. It's worth having an honest conversation to explain the potential impact of their absence and why their involvement is essential for the project's success.

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THE PROCESS ROADMAP

BUILD YOUR DREAM TEAM

Process projects don't succeed without the right people in the room. To be successful, you need three key roles:

- The Architect: This person has the strategic perspective to identify the gap between goals and the reality of how operations work. They're the designer, the one who can see how all the pieces fit together—or don't and should help set priorities. This might be you!
- The Project Manager: Someone has to drive the train. The Project Manager organizes SME interviews, ensures timelines are met, and coordinates the software build and roll out.
- The SMEs: These are the people who live and breathe the work every day. They know the current process inside and out and are your greatest asset when it comes to uncovering what works, what doesn't, and where improvements are most needed.

FOCUS ON PAIN POINTS OR OPPORTUNITIES

Every process initiative should do one of two things: reduce pain or capture opportunities. If it doesn't accomplish one of those goals, it's a distraction. When you tackle the processes causing bottlenecks, inefficiencies, or missed opportunities, you'll feel the results ripple through your entire organization.

WHY THIS MATTERS

When you start with priorities, you save time, money, and energy—the most critical resources for the people driving process initiatives. These individuals are often some of the busiest in the organization, juggling competing demands while navigating team resistance and the constant pull of "urgent" issues. Tackling process improvement without a clear plan can leave them overwhelmed, fatigued, and disillusioned, feeling like their efforts are futile or endlessly delayed.

Focusing on what truly matters avoids this spiral. By targeting areas that deliver visible wins, you build momentum and reinforce the belief that these efforts are worth it. Prioritization creates alignment across teams, allowing everyone to see and understand the value of the work being done.

If you're deliberate about where you start and who you involve, you not only set your project up for success—you preserve the motivation, energy, and engagement of the very people who will make it happen.

Prioritization isn't just a step; it's the foundation for everything that follows.



Mapping a process can feel like trying to untangle a giant ball of yarn—it's easy to get lost in the details and feel overwhelmed. But here's the thing: it doesn't have to be complicated. The trick is to focus on simplicity first. Start small, stay focused, and build from there.

Before we dive in, let's clarify three often-confused terms:



WHAT IS A PROCESS?

A process is a sequence of actions or steps designed to achieve a particular outcome. Think of it as the "big picture" or the roadmap. Ex:

- Onboarding a new hire.
- · Closing a sale from lead to contract.
- Resolving a customer service issue.
- Running a payroll cycle.



WHAT IS A PROCEDURE?

A procedure is the specific way a task within the process is carried out. Procedures live inside processes, like individual scenes in a movie.



WHAT IS A POLICY?

A policy is the standard that a procedure should adhere to. A policy could address the quality or the timeliness (A.K.A. deadlines).

Understanding the distinction keeps you from getting bogged down in unnecessary details early on.

THINK BIG PICTURE

Mapping a process is a lot like writing a book. You don't start by writing every sentence word for word. First, you create an outline. You focus on the chapters, the major sections, and the overall flow of the story.



KEY QUESTIONS TO ANSWER BEFORE YOU START

- Where does the process begin? What triggers it?
- Where does the process end? What's the final outcome?
- What are the hand-offs? Who is responsible at each stage?
- Who's involved? Are there multiple people engaged?
- Where is it tricky? What part of the process requires special skill or attention?

Start by defining the framework with your SME. Use a whiteboard or use PlaybookBuilder to map out **8-12 main steps or phases**. Don't worry about filling in every detail yet. Focus on the major building blocks of the process.

OUTLINE FIRST, DETAILS LATER

Once you've established the big picture, add 3-5 sub-points under each main step. A sub-point might be a sequence or simply supplemental ideas to reinforce the main objective. These sub-points help you capture the specifics shared by your SME. SMEs are your goldmine for uncovering the details of how things really work.



PRO TIP ONE: Pay close attention to the parts of the process that feel more complex, impactful, or time-consuming. When an SME emphasizes certain steps or sub-points, circle them. Those are likely the high-impact areas that deserve more focus later on when you interview them.



PRO TIP TWO: What if the process branches into two options? Build your process for the 80% or ideal approach. Address the anomaly as a supplement to the process. What if it almost ALWAYS branches off? Then consider it as an alternate process and treat it as such.



PRO TIP THREE: How much detail is enough? How much is too much? If you are making a process with 20 steps, it's possible you're going too deep OR you actually have TWO processes in one. Slow down and ask: Who's using this and what's the natural way they'll reference it? Sometimes an obvious division emerges if you look at it from the user's perspective.



KEEP IT COLLABORATIVE

Process mapping isn't a solo exercise. Make it collaborative by involving your SMEs. These are the people who deal with the process daily and have invaluable insights.

Here's a simple workflow:



DRAFT TOGETHER

Use the whiteboard or a shared tool to outline the steps in a brainstorming session.

VALIDATE WITH SMEs

Confirm that the map reflects reality—not just how things should work, but how they actually work.

REFINE FOR SIMPLICITY

Eliminate redundancies and make sure each step has a clear purpose.



PRO TIP: Is it a good idea to turn this into a committee project? Typically not. Start with one SME to get your first draft and then circulate it to others for their opinions. Collaborate. But just on terms that serve you. Otherwise, you'll spend a lot of time trying to coordinate meetings and wrangling opinions at the whiteboard.

WHY IT WORKS

By focusing on simplicity first, you avoid the common pitfall of getting lost in the weeds too early. A clear, concise process map becomes the foundation for everything elsetraining, optimization, and even automation.

The ultimate goal? A process map that is intuitive and actionable, one that anyone in the organization can follow without confusion. Keep it simple. Start with the outline, then let the details unfold naturally as you move forward. When you approach process mapping this way, what once seemed overwhelming becomes a manageable, even enjoyable, exercise. After all, who doesn't love seeing clarity emerge from chaos?

Now let's bring it to life with the wisdom of your best people.

O3 STEP THREE: CAPTURE WISDOM

Processes are only as good as the people who bring them to life. Your SMEs are the heart of your organization's operational know-how. They've honed their expertise through years of experience, and their insights are invaluable. But here's the challenge: documenting that knowledge in a way that is both accessible and actionable without drowning in the details.

Here's the secret: don't write, film.

WHY FILMING WORKS

Writing exhaustive SOPs is a slog—for both the writer and the reader. Instead, use video to capture your SMEs' insights in their own words, with their own natural flow. This creates training content that feels real, relatable, and effective. A simple video of an SME explaining their process can often communicate more nuance than a 20-page document ever could.

HOW TO FILM SMEs

CREATE A SHOT LIST

Use the process map you built in Chapter Two as your guide. Treat it like a script outline. For each step in the process, plan the questions you'll ask your SME. These questions should cover:

- The what (What happens in this step?)
- The how (How is it done?)
- The **why** (Why is it done this way?)
- The dos and don'ts (Any common pitfalls or best practices?)
- The **stories** (Did you ever do it wrong? What happened?)

SET UP FOR SUCCESS

You don't need a professional studio. A smartphone, a tripod, and a wireless mic are enough. Keep it simple:

- Use landscape mode. Always film horizontally for a professional look.
- Have them face you, not the camera. Don't make them stare into the camera; it can make them self-conscious. Instead, position the camera slightly to the side and have them share directly to you.



MAKE IT A CONVERSATION

The best videos feel like natural conversations, not rehearsed presentations. Ask openended questions and let the SME elaborate. Be ready to prompt them to clarify or expand on key points.



PRO TIP: Make a video or two for each of the bulleted points in the outline. That way you don't have to edit the videos later. One topic, one video.

DON'T AIM FOR PERFECTION

SMEs don't need to memorize content or deliver a polished performance. Your goal is to capture their authentic wisdom. If they stumble, that's okay—edit later if needed.

TECH TIPS FOR BETTER VIDEOS

USE YOUR PHONE

You always know where it is, you know how to use it, and it's easy.

INVEST IN AUDIO

A wireless mic is a small expense that makes a big difference.

KEEP IT STEADY

Use a tripod to avoid shaky footage.

CHECK THE LIGHTING

Film in a well-lit space, ideally with natural light, to keep the video clear and professional.

DON'T FORGET SCREEN CAPTURE VIDEOS

Capture people teaching how they use various software tools.



WHAT TO DO WITH THE VIDEOS



BREAK THEM DOWN

After filming, segment the videos by process step. Each step should be its own short, digestible video. Think of them as modular training units that can stand alone or be used together. 2-5 minutes tops.



QUICK EDITS ARE ENOUGH

Keep it simple and practical. For instance, make quick edits to ensure your people are smiling and any confusing content is removed. These quick edits ensure clarity without bogging you down in unnecessary details.



INTEGRATE INTO TRAINING MATERIALS

Use the videos as the foundation of your playbook (we'll get to how to do that in Chapter Four). Pair them with supporting documents, quick-reference guides, or quizzes to solidify learning.

WHY THIS APPROACH WINS

By filming your SMEs, you capture their expertise in a way that's natural, engaging, and—most importantly—reusable. Video training provides a living resource that can evolve over time, rather than a static document gathering dust.

You're not just creating content—you're preserving institutional wisdom. And when people feel seen, heard, and valued for their contributions, they're more motivated to champion the process improvements that follow. So, skip the endless writing. Pick up your phone, hit record, and let your SMEs share their brilliance. You'll thank yourself later.

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THE PROCESS ROADMAP

O4 STEP FOUR: HOW TO BUILD A PLAYBOOK

Now that you've mapped your process and captured the wisdom of your SMEs, it's time to bring it all together into a playbook. Think of the playbook as the ultimate resource: part instruction manual, part inspiration, and entirely practical. Its purpose is simple—to make sure everyone on your team can understand and follow the process, no matter their role or experience.

But here's the key: don't overthink it.

THE "GOOD ENOUGH" PRINCIPLE

The goal isn't perfection; it's usefulness. You don't need to create an award-winning masterpiece. You just need to create something your team can actually use. A good playbook delivers results without overloading your people with unnecessary details.

HOW TO BUILD YOUR PLAYBOOK

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START WITH THE VIDEOS

The videos you recorded with your SMEs are the backbone of your playbook. Break them into bite-sized segments that align with the steps in your process map.

- Example: If your process has 10 steps, include one video per step.
- Can you add more videos per step? Certainly!
- Do you have to use a video for every step? Absolutely not!
- Don't forget to include the welcome videos for each step of the process.



ADD SUPPORTING MATERIALS

Complement the videos with simple, practical resources:

- Step-by-step guides: Text versions of the key points covered in the videos.
- Checklists: Help users track their progress through the process.
- Reference documents: Links to policies, templates, or detailed procedures.



INCORPORATE INTERACTIVE ELEMENTS

Engagement matters. Include elements that encourage users to actively participate:

- Quizzes: Reinforce learning by testing their understanding of critical steps.
- Surveys: Gather feedback on what's working and what's unclear.

KEEP IT SIMPLE AND PRACTICAL

Your playbook doesn't need to be exhaustive. In fact, less is often more. The best playbooks are clear, concise, and easy to navigate. Here are a few tips:

USE PLAIN LANGUAGE

Avoid jargon or overly technical terms unless absolutely necessary.

VISUALS MATTER

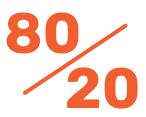
Use flowcharts, diagrams, or screenshots to make complex concepts easier to grasp.

TEST FOR CLARITY

Share the playbook with a small group first and ask for feedback. Is it intuitive? Do they feel confident using it?

AVOID OVERBUILDING

A common pitfall when creating a playbook is trying to include everything. But more content doesn't mean more value. Think of your playbook like making soup: you don't throw in every ingredient in the kitchen. You add just enough to create the desired result.



FOCUS ON THE 80/20 RULE

- Capture the first 80% of the process that's essential.
- Test it.
- Refine based on feedback.

The extra bells and whistles can wait until you're sure the core content delivers results.

ITERATE AND IMPROVE

Your playbook is a living document. Once you roll it out, monitor how it's being used and make adjustments as needed. Look for these signals:

- Are users accessing the content regularly?
- Are they completing the steps outlined in the process?
- Are your scorecard metrics improving as a result?

Treat the playbook as a flexible tool that evolves with your team's needs.



WHY PLAYBOOKS WORK

A well-built playbook creates alignment and consistency across your organization. It eliminates ambiguity by giving every team member a single source of truth. Most importantly, it empowers people to take action without hesitation, knowing they have the resources they need to succeed.

Remember: The playbook isn't the goal—it's a means to an end. The real win comes when your team uses the playbook to work smarter, faster, and more confidently. Practical. Clear. Useful. That's the playbook you need to build.

And now let's get the ROI from it...let's launch!

5 STEP FIVE: LAUNCH AND MEASURE

So you've mapped your process, captured wisdom, and built your playbook. Now comes the real test: implementation. This is where process improvement moves from theory to action, and it's crucial to understand that this isn't just about steps on a flowchart—it's about change management.

Shocker Alert: Unless you're selling your business this year or you are an ISO 9000 compliant company there is no real ROI on process documentation. It's only when you USE process as the chassis for your training that you see the benefits.

At its core, process is about eradicating ambiguity and closing training gaps. It's not the process itself that transforms an organization; it's the effect the process creates. A clear, effective process aligns your team, eliminates guesswork, and drives consistent outcomes. The ripple effects of this clarity can transform your organization—but only if you manage the change well.

ITERATE AND IMPROVE

Before diving into implementation, it's critical to set clear expectations and establish what success looks like. Without clear criteria, you won't know if you've achieved your goals. Start by asking yourself and your team these key questions:

- · How will we measure adoption?
- · What level of engagement is necessary?
- What specific results is this process intended to drive on our scorecard?

These answers create a roadmap for tracking progress and celebrating wins, ensuring everyone understands what's at stake.

Equally important is communicating the why behind the process. Change is hard, and people naturally resist it—especially when they don't understand its purpose. Highlight tangible outcomes, like reducing errors, speeding up workflows, or setting clearer expectations. When your team sees how the process will directly improve their work, they're more likely to embrace it.

A common pitfall in process roll outs is treating them as one-time events. Successful process improvements require regular reinforcement to become habits. Here's how to keep the process top of mind:

- Use Text Alerts: Send timely reminders about key features, deadlines, or updates. For example: Reminder: Check out the new onboarding video for Step 3—it's a game-changer!
- Automated Emails: Share updates, success stories, and answers to FAQs with a helpful and encouraging tone.
- Consistency is Key: During the first month, send weekly reminders to build momentum. Gradually taper to bi-weekly updates as engagement stabilizes.

Tie these reminders to moments when your team naturally interacts with the system. A morning text might encourage reviewing the playbook, while a celebratory email could highlight milestones reached and next steps. Recognize individuals or teams who've embraced the process and are seeing results—public acknowledgment goes a long way in reinforcing the initiative's importance.

When it's time to launch, start with clarity. Roll out the process gradually, beginning with a small pilot group. Use their feedback to refine and improve before scaling to the entire team. Training should be engaging and hands-on, with the playbook serving as the central resource. Combine videos, quick guides, and interactive elements like quizzes to make learning intuitive and impactful.

Finally, measure and iterate. Monitor how people interact with the platform and review your scorecard metrics. If the results aren't improving, dig deeper:

- Are people following the process?
- Are there gaps in understanding or barriers to implementation?

Treat the process as a living initiative. Gather feedback, refine the system, and adjust as needed.

When done thoughtfully, this isn't just a new system; it's a sustainable habit that transforms how your organization operates. With clear communication, consistent reinforcement, and regular evaluation, your process improvement efforts can deliver lasting success.



WHY CHANGE MANAGEMENT MATTERS

THE PROCESS IS JUST A FRAMEWORK

The real power comes from what it enables: clarity, alignment, and consistent results. By removing ambiguity and addressing process gaps, you create an environment where your team can consistently perform at their best.

CHANGE MANAGEMENT

Effective change management ties process improvements directly to measurable outcomes, providing data everyone can see and goals they can work towards. When your team understands how the process impacts key metrics—like improved efficiency, fewer mistakes, or increased customer satisfaction—they're more likely to embrace and sustain the change.

COMMUNICATION, CONTENT, AND REMINDERS

Strong communication, engaging content, and regular reminders, transform your process from more than just a one-time initiative—it evolves into a habit that drives lasting results. That's when the big outcomes and results happen—not just for the process, but for your entire organization.

THE BEGINNING OF THE END... OF CHAOS

Processes are the backbone of operational success, but they're only as strong as the intention and clarity behind them. A great process doesn't just organize tasks—it empowers people, removes barriers, and drives meaningful results. When built with simplicity and purpose, processes become the foundation for growth, innovation, and long-term success.



Now is the time to take the first step. Use this roadmap to identify what matters most, eliminate ambiguity, and create systems that truly work for your team. Whether you're solving pain points or capturing new opportunities, the right process can transform not only your operations but your entire business.

Start today. Book a kickoff meeting with your team to define priorities. Or let us support your efforts. We'd love to help and can dive into the role of Process Champion.

ABOUT PLAYBOOK BUILDER

Founded in 2009, PlaybookBuilder is an award-winning and Al powered learning software trusted in the EOS Community by over 200 EOS Implementers and their clients. PlaybookBuilder provides services and software to not only capture processes and training but also to improve Scorecard numbers with permanent solutions.



WWW.PLAYBOOKBUILDER.COM INFO@PLAYBOOKBUILDER.COM

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