Build a Process Checklist in 9 Steps

Challenge: Pick something with multiple steps that you do at least monthly. Use this worksheet to create a step-by-step process checklist of **any** repeatable task.

Task/Process _____

Owner:

Date:

1 Define a clear objective:

Write the outcome. If "done" isn't obvious, the checklist won't be either.

2 List all necessary steps:

Brain-dump every action required from start to finish—no filtering yet.

3 Break down larger steps:

If a step feels vague, split it into concrete actions.

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4 **Put steps in logical order:**
Arrange steps in the sequence they must happen.

5 **Start from a baseline:**
Document how it's truly done today (reality first), then improve over time.

6 **Format checklist for clarity:**
Use headings, groupings, and consistent wording so it's easy to scan.

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7 **Target one page in length:**
Keep it short enough to be used. If it's too long, it will get ignored.

8 **Add owners & deadlines (optional):**
For teams, assign responsibility and due dates to avoid dropped balls.

9 **Get input from task do-ers:**
Review with people who do the work to catch blind spots and improve accuracy.

The Checklist

- [ ] Defined a clear objective
- [ ] Listed all necessary steps
- [ ] Broke down larger steps
- [ ] Put steps in logical order
- [ ] Found the baseline
- [ ] Formatted checklist for clarity
- [ ] Made it one page in length
- [ ] Added owners & deadlines (optional)
- [ ] Got input from task do-ers

Notes: