

PRACTICAL TOOL

Usable Documentation Starter Kit

A practical guide for creating playbooks, process guides, and standard operating procedures that teams can find, understand, and use.

THIS RESOURCE HELPS YOU

- Capture the parts of work that must be repeatable and transferable.
- Make documentation usable during real work, not just complete on paper.
- Create clear ownership for updates and change.

What usable documentation must contain

Purpose and intended user

State why the document exists, when it should be used, and who it is written for.

Named owner and required inputs

Make ownership clear and identify the information, approvals, or tools needed before work begins.

Actionable steps and decision points

Describe the critical sequence and where judgment, approval, or escalation is required.

Links to tools and templates

Connect the guide directly to the systems, files, forms, or templates people use to complete the work.

Review date and change ownership

Name who maintains the document and when it should be reviewed so it does not quietly become obsolete.

What to document first

High-risk recurring work

Prioritize work where an error, delay, or missed handoff has meaningful operating consequences.

Processes carried in memory

If one person explains the process differently each time, capture the stable core and the important exceptions.

Work that is hard to transfer

Document where onboarding, role transitions, or cross-training repeatedly require extensive verbal explanation.

Cross-functional handoffs

Clarify what one role must provide before another can begin, and what “complete” means at the handoff.

Do not document everything

The goal is not a giant manual. Start with the small set of instructions that materially improve reliability and continuity.

A minimal playbook structure

1. Purpose and trigger

What outcome is this process designed to produce, and what event starts it?

2. Owner and contributors

Who owns the result, who contributes, and who has decision authority when exceptions arise?

3. Inputs and prerequisites

What information, access, approvals, or materials are needed before the work begins?

4. Steps, decisions, and exceptions

Capture the critical sequence, expected decisions, common exceptions, and escalation path.

5. Output, linked tools, and review ownership

Define the expected result, link the working tools, and name who keeps the document current.