AI PROMPT PACK: PROCESS AUDITS & SOPS

Audit a process, find the bottlenecks, and write the SOP.

Three prompts for Claude or ChatGPT that work in sequence: prepare the audit, find where work waits or gets lost, and turn what you learn into a clear, written SOP. Copy, paste, fill in the brackets, and go.

How to use these prompts

These prompts are built to run in order. Use Prompt 01 to prepare your interviews, Prompt 02 to analyze what you heard, and Prompt 03 to turn it into a written SOP.

> Copy a prompt into Claude or ChatGPT, then replace everything in [BRACKETS] with your own details.

> Review every output before you share it. AI drafts; people decide.

> Follow your company's policy on what information can go into AI tools. When in doubt, remove names, account numbers, and pricing first.

> If the first answer isn't right, tell the AI what to change. A short follow-up usually gets you there.

PROMPT 01

The Process Audit Interviewer

Prepare the right questions before you sit down with the people who do the work, so the audit captures what really happens.

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You are a process improvement consultant preparing to audit a business process. The process
is: [PROCESS NAME, e.g., new customer onboarding].

The teams involved are: [TEAMS]
The systems used are: [SYSTEMS]
What prompted this audit: [THE PROBLEM, e.g., invoices going out late]

Create an interview guide I can use with the people who do this work. Include:
1. Five opening questions about how the process starts and what triggers it
2. Questions to walk through each step: who does it, which system, how long it takes, and
what they need from someone else
3. Questions about exceptions, workarounds, and “what happens when…” situations
4. Questions that uncover knowledge only one person has
5. Two closing questions about what they would change first

Keep the questions plain and conversational. Avoid leading questions.
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Tip: Interview the person who does the work, not just their manager. The two versions are often different, and the gap is a finding.

Tip: Record the conversation, with permission, so you can paste the transcript into Prompt 02.

PROMPT 02

The Bottleneck Finder

Find where work waits, gets lost, or gets done twice, and see which fix will matter most.

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You are an operations analyst. I will paste notes or a transcript describing how a process
works today.

Analyze it and give me:
1. The process as numbered steps, each with an owner (role) and the system used
2. Wait points: where work sits waiting for a person, an approval, or information
3. Lost-work risks: where something can be dropped, forgotten, or fall between teams
4. Duplicate effort: where the same data is entered or checked more than once
5. Single points of failure: steps only one person knows how to do
6. The top three fixes, ranked by impact and ease, with one sentence explaining each

Use only what is in my notes. If something important is missing, list it as a question
instead of guessing.

Here are my notes:
[PASTE NOTES OR TRANSCRIPT HERE]
```

Tip: Compare the output with what your team believes the bottleneck is. If they differ, look closer at both.

Tip: Fix ownership and triggers before you automate. Automation makes a broken step fail faster.

PROMPT 03

The SOP Writer

Turn what you learned into a clear, written standard operating procedure your team will actually use.

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You are a technical writer who creates clear standard operating procedures (SOPs) for
operations teams. Using the process notes below, write an SOP with these sections:

1. Purpose: one or two sentences on why this process exists
2. Scope: what is included and what is not
3. Owner and roles: who owns the process and who does each part
4. Trigger: exactly what starts the process
5. Steps: numbered, one action per step, starting each with a verb, and naming the system
used
6. Exceptions: common situations and what to do in each
7. Definition of done: how someone knows the process is complete
8. Review date: a placeholder for when the SOP should next be reviewed

Write for someone new to the role. Use short sentences and plain language. Flag any step
that is unclear in my notes as [NEEDS CONFIRMATION].

Here are my process notes:
[PASTE NOTES, PROCESS MAP, OR PROMPT 02 OUTPUT HERE]
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Tip: Have someone who didn't write the SOP follow it once. Wherever they get stuck, the SOP needs another line.

Tip: Store SOPs where the work happens, such as a linked page in the CRM or a shared team folder, not in someone's downloads.

Keep your SOPs alive

An SOP is only useful if it matches how the work is done. Give every SOP an owner and a review date, and update it whenever a system, team, or policy changes. A short SOP that's current is worth more than a long one nobody trusts.

Want help auditing and documenting your processes?

I help growing B2B companies map their customer lifecycle, fix the handoffs, and build processes, controls, and documentation their teams will actually use, with automation and practical AI where it saves time. For more details, visit www.onestopsourcinggroup.com.

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