

Process Documentation Template

All 12 sections, blank, followed by a filled-in example.

HOW TO USE THIS TEMPLATE

Part 1 is the blank template. Fill in each field for your own process. For a short, low-risk process, you can drop the sections marked optional. Part 2 is a filled-in example for a monthly invoice run at Northbeam Studio, a fictional agency with sample names and dates.

1. Process Name and Document Details

Process name	
Process owner	
Department	
Document number	
Created	
Last updated	

2. Purpose

What this process achieves	
Why it exists	
Result of a completed run	

3. Scope and Boundaries

Starts when	
Ends when	
In scope	
Out of scope	

4. Trigger and Frequency

Trigger	
Frequency	

5. Roles and Responsibilities (RACI)

TASK OR DECISION	RESPONSIBLE	ACCOUNTABLE	CONSULTED	INFORMED

Contacts:

6. Prerequisites and Inputs OPTIONAL

Needed before step 1	
----------------------	-------------

7. Tools, Systems and Resources OPTIONAL

Apps and access	
Reference docs	

8. Process Steps

STEP	ACTION	OWNER	TOOL	OUTPUT
1				
2				
3				
Screenshot or visual aid per step:				

9. Outputs

Produced	
Received by	

10. Decision Points and Exceptions

IF THIS HAPPENS	DO THIS	RISK

11. Approval and Sign-Off OPTIONAL

Approved by	
-------------	--

Date

12. Revision History and Review Schedule

VERSION	DATE	AUTHOR	WHAT CHANGED
---------	------	--------	--------------

Next review date:

Filled-in example

Monthly Invoice Run at Northbeam Studio, a fictional agency with sample names and dates.

1. Process Name and Document Details

Process name	Monthly Invoice Run
Process owner	Dana Okafor, Finance Lead
Department	Finance
Document number	FIN-007
Created	9 January 2026
Last updated	2 September 2026

2. Purpose

What this process achieves	Bill each client for last month's hours.
Why it exists	No unbilled hours.
Result of a completed run	Each invoice sent and logged.

3. Scope and Boundaries

Starts when	The hours export
Ends when	The last invoice is logged
In scope	Every active client
Out of scope	Chasing overdue payments

4. Trigger and Frequency

Trigger	The first business day of each month
Frequency	Monthly

5. Roles and Responsibilities (RACI)

TASK OR DECISION	RESPONSIBLE	ACCOUNTABLE	CONSULTED	INFORMED
Monthly invoice run	Sam Reyes, billing	Dana Okafor	Account managers	Managing director

Contacts: Sam Reyes for invoice questions, Dana Okafor for approvals

6. Prerequisites and Inputs OPTIONAL

Needed before step 1:

- ☐ Timesheets approved by month end
- ☐ Harvest and QuickBooks access

7. Tools, Systems and Resources OPTIONAL

Apps and access	Harvest, QuickBooks, Google Sheets tracker
Reference docs	Client rate card

8. Process Steps

STEP	ACTION	OWNER	TOOL	OUTPUT
1	Pull billable hours	Sam	Harvest	Hours export per client

STEP	ACTION	OWNER	TOOL	OUTPUT
2	Generate invoices	Sam	QuickBooks	Draft invoices
3	Review for errors	Dana	QuickBooks	Approved invoices
4	Send to clients	Sam	QuickBooks	Sent invoices
5	Log in the tracker	Sam	Google Sheets	Updated tracker

Screenshot or visual aid per step: One per step

9. Outputs

PRODUCED	RECEIVED BY
Invoices	Each client's billing contact
Tracker	Managing director

10. Decision Points and Exceptions

IF THIS HAPPENS	DO THIS	RISK
Hours are missing for a client	Flag the account manager before sending	Under-billing

11. Approval and Sign-Off OPTIONAL

Approved by	Dana Okafor
Date	2 September 2026

12. Revision History and Review Schedule

VERSION	DATE	AUTHOR	WHAT CHANGED
---------	------	--------	--------------

v1.2	2 September 2026	Dana Okafor	Moved the error review to Dana
------	------------------	-------------	--------------------------------

Next review date: 2 March 2027