The best current way, written down

In Lean: standard work, or SOP

How we do this work today

Short enough to use while working, written by the people who do the work, from what they actually do. It is the starting line for the next improvement, not a rule carved in stone.

Which work, who keeps it current

Name of this work

Owner
Keeps it current and reviews it.

Written or last reviewed on

Next review date

Version

Purpose and trigger

What is this work for, and who receives the result?

What starts this work?
The request, date or event, such as a signed contract arriving.

Steps, in order (in Lean: standard work)

As few as possible, each starting with a verb: check, send, record. Leave out what any competent person would do anyway; keep the steps where errors happen.

No.	Step	What makes it succeed or fail, and why *In Lean: key point. What experienced people know and new people lack.*
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

Write only steps that should exist: if nobody uses what a step produces, remove it rather than write it down. More than twelve steps usually means two pieces of work; split them.

What good looks like

How can someone tell the work was done right?

Exceptions

The two or three cases that need a different path.

When this happens	Do this instead, or ask

Where this came from and how it stays alive (in Lean: SDCA)

Problem or friction it came from
Its name or link.

Change held on

On the review date, the owner looks at a few real items: is this followed, and does it still work? If not, ask what got in the way before changing anything. A better way is tried as a new plan, try, check cycle first.

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