

Process Documents and Checklists

Briefing

This guide is designed to help you spot tasks that can be handed over to a VA, what Jessanol would usually need from you, and what the end result could look like.

HOW THIS HELPS

A lot of business admin works because someone knows how it works. That is fine until that person is unavailable, too busy, trying to hand something over, or simply tired of explaining the same thing again.

Jessanol can help turn repeated tasks, informal processes and “it’s all in my head” knowledge into clear process documents and checklists.

THIS IS USEFUL IF

This type of support may be useful if:

-  You keep explaining the same task more than once
-  A process only works because one person knows the steps
-  You want to hand work over but do not have instructions written down
-  Tasks get missed because there is no checklist
-  You want a clearer way to onboard team members, freelancers or clients
-  You have existing process notes that need tidying
-  You want to reduce the number of “where do I find that?” questions

WHAT JESSANOL CAN SUPPORT WITH

Jessanol can help create or update process documents and checklists.

This may include:

- Writing step-by-step process notes
- Creating checklists for regular tasks
- Updating existing process documents
- Turning rough notes into usable instructions
- Identifying gaps, questions or unclear steps
- Creating simple handover documents
- Adding links, file locations, responsibilities and timings where needed

RECOMMENDED RHYTHM

This can be done whenever a process is repeated, unclear, handed over or causing avoidable admin.

For example:

- A one-off process documentation project
- A checklist created after a task has been completed
- Regular process updates as systems or responsibilities change
- Support during onboarding, handover or growth

ACCESS LIKELY NEEDED

Jessanol will probably need:

- Examples of how the task is currently done
- Access to relevant systems, folders or files
- Input from the person who knows the process best
- Any existing notes, screenshots or previous versions
- Details of who owns the task and who uses the process
- Guidance on where the finished process document should live

IMPORTANT CONSIDERATIONS

Before starting, we will agree:

- Which task or process needs documenting
- Who currently knows the process best
- Who needs to use the finished document
- How detailed the instructions need to be
- Whether a checklist, process note or handover document is most appropriate
- Who should review and approve the final version

The aim is to make the process easier to follow, not overcomplicate it. The final version should include enough detail for someone else to follow the task, but not so much that no one wants to use it.

STEP-BY-STEP INSTRUCTIONS

1. Identify the task or process that needs documenting.
2. Gather existing notes, examples, screenshots or previous versions.
3. Talk through or review how the task is currently completed.
4. Draft the process in clear, practical steps.
5. Add links, file locations, responsibilities and timings where needed.
6. Create a checklist version if useful.
7. Highlight any gaps, risks or unclear points.
8. Share with the process owner for review and approval.
9. Save the final version in the agreed location.

WHAT YOU NEED TO PROVIDE

To get started, you will usually need to provide:

- A short explanation of the task or process
- Any existing notes, examples or files
- Access to relevant folders or systems
- A walkthrough if the process currently lives mostly in someone's head
- Details of who uses the process
- Any steps that must be followed exactly
- Any known issues, exceptions or common mistakes

You do not need to have the process neatly explained before support starts. Talking it through is often enough to create the first draft, or you may have a recording, e.g. Loom that can be used.

WHAT YOU'LL GET BACK

You should have:

- A clearer process document
- A practical checklist if needed
- Less reliance on one person remembering every step
- Easier handover of repeat tasks
- Fewer missed steps
- A better starting point for future training, onboarding or delegation

If this sounds familiar, we can use this as a starting point to work out what support would be most useful. Contact me: jane@jessanol.com