

PARTICIPANT FIELD KIT

PROCESS ARCHAEOLOGY

**Excavate the know-how that keeps
everyday operations moving.**

Turn one unwritten process into a guide your team can test

NAME

WORKSHOP DATE

Choose a process you can finish today.

Use one repeated, low-risk process. If the process depends on legal, medical, safety, personnel, student, or financial judgment, choose a different process for this workshop.

PROCESS NAME

WHO KNOWS IT BEST?

WHO NEEDS TO USE IT?

WHAT KEEPS GOING WRONG OR GETTING REPEATED?

WHAT STARTS THE PROCESS?

WHAT PROVES IT IS FINISHED?

IN SCOPE

OUT OF SCOPE

Quick eligibility check

- ☐ It happens often enough to test. ☐ It is narrow enough for one session.
- ☐ It is safe to discuss with sanitized examples. ☐ It has at least one handoff, exception, or decision.
- ☐ Someone can test it within seven days.

Every process leaves traces.

List what the process leaves behind. Rough notes are useful. A polished story can hide the missing parts.

TRACE OR EXAMPLE	WHERE IT CAME FROM	SOURCE TAG

OBSERVED

Seen in actual work.

REMEMBERED

Supplied from experience.

APPROVED

Confirmed by an authorized source.

UNRESOLVED

Needs evidence or review.

QUESTIONS THE TRACES RAISE

Do not answer by guessing.

Each process gets its own six-minute interview.

PROCESS HOLDER

Describe what happens. Show examples. Name exceptions. Say when you stop.

EXCAVATOR

Ask, listen, and write down what is missing. Do not redesign the process.

ROUND 1 / 6 MIN
 Switch roles
 ROUND 2 / 6 MIN

01 What must already be true?

02 What do you notice first?

03 Which steps happen every time?

04 Where can the path split?

05 What information is often missing?

06 What gets handed off?

07 What should never be guessed?

08 Who may approve an exception?

09 What proves it is complete?

10 Where does it break down?

NOTES FROM YOUR INTERVIEW

Listen closely when the answer begins with 'usually' or 'it depends.'

Current practice and future improvements need separate maps.

TRIGGER

REQUIRED INPUTS

#	WHAT HAPPENS	DECISION OR EXCEPTION	HANDOFF OR OWNER
1			
2			
3			
4			
5			
6			
7			

STOP AND ASK WHEN

DEFINITION OF DONE

POSSIBLE IMPROVEMENTS – KEEP SEPARATE FROM THE CURRENT ROUTE

The route tells you which format fits.

☐ CHECKLIST

Use when the process is short, repeated, and mostly linear.

☐ SOP

Use when people need the sequence, context, roles, and handoffs.

☐ INTAKE FORM

Use when missing information keeps blocking the work.

☐ DECISION GUIDE

Use when rules, exceptions, or approvals change the path.

WHY DOES THIS FORMAT FIT THE PROCESS?

WHO WILL USE IT, AND IN WHAT MOMENT?

Complete one artifact template. In the browser, choose a format and open it directly. For print, use the matching insert.

Checklist

CHECKLIST NAME

INTENDED USER

START WHEN

DONE WHEN

DONE	STEP	REQUIRED INFORMATION OR TOOL
☐		
☐		
☐		
☐		
☐		
☐		
☐		
☐		
☐		

STOP AND ASK

Standard operating procedure

PROCEDURE NAME

PROCESS OWNER

PURPOSE

WHO USES IT

START WHEN

DONE WHEN

REQUIRED INPUTS, TOOLS, AND SOURCE MATERIAL

#	INSTRUCTION	ROLE OR HANDOFF
1		
2		
3		
4		
5		
6		

EXCEPTIONS

STOP AND ASK

Intake form

FORM NAME

WHO REVIEWS IT

WHAT THIS FORM PREPARES SOMEONE TO DO

A COMPLETE SUBMISSION INCLUDES

FIELD OR QUESTION	REQUIRED?	WHY IT IS NEEDED

IF INFORMATION IS MISSING

INFORMATION THIS FORM SHOULD NOT COLLECT

Decision guide

GUIDE NAME

WHO MAKES THE DECISION

USE THIS GUIDE WHEN

THE DECISION IS COMPLETE WHEN

IF THIS IS TRUE	THEN DO THIS	APPROVAL OR HANDOFF

NEVER GUESS

ESCALATE WHEN

Prepare the source packet before opening a tool.

Privacy check

- ☐ Names and contact details removed.
- ☐ Account numbers and confidential terms removed.
- ☐ Sensitive cases generalized.
- ☐ An authorized person or policy allows this tool to receive the material.

If you do not know whether the tool is approved, stop here. Continue on paper and seek authorization later.

PASTE OR SUMMARIZE THE SANITIZED SOURCE NOTES

Keep the source tags: observed, remembered, approved, unresolved.

APPROVED TOOL OR PAPER ROUTE

WHO OR WHAT CONFIRMED THIS USE IS ALLOWED?

Pair one shared boundary with the right format.

WHO WILL USE THE DRAFT?

COMMON BOUNDARY

Use only the source notes I provide. Do not invent rules, thresholds, or missing steps. Keep observed, remembered, approved, and unresolved claims distinct. Mark missing information as [CONFIRM]. Draft for [USER]. After the draft, list assumptions, contradictions, and questions.

CHECKLIST

Create a checklist with the trigger, required inputs, ordered actions, completion checks, and stop-and-ask conditions.

SOP

Create an SOP with purpose, roles, ordered procedure, handoffs, exceptions, records, and stop-and-ask conditions.

INTAKE FORM

Create an intake form with required and conditional questions, routing fields, missing-information handling, and information the form must not collect.

DECISION GUIDE

Create a decision guide using only approved criteria, with clear branches, approvals, escalation points, and unresolved rules.

WHAT THE DRAFT ORGANIZED WELL

WHAT IT INVENTED, MISSED, OR BLURRED

Three cases expose three different gaps.

Test the route before improving the wording.

NORMAL CASE

Can the user reach done without extra coaching?

CASE USED	GAP FOUND	REVISION MADE

COMMON EXCEPTION

Does the path change clearly?

CASE USED	GAP FOUND	REVISION MADE

NEWCOMER CASE

What knowledge is still assumed?

CASE USED	GAP FOUND	REVISION MADE

QUESTIONS THAT REMAIN UNRESOLVED

A usable draft names its owner, reviewer, and status.

PROCESS NAME	VERSION
PROCESS OWNER	REQUIRED REVIEWER OR APPROVER
REVIEW DATE	NEXT REVIEW DATE

Choose exactly one status

☐ Draft ☐ Ready for review ☐ Approved for a limited field test ☐ Returned with questions

☐ Approved for use

STOP-AND-ASK CONDITIONS	UNRESOLVED QUESTIONS
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REVIEWER DECISION AND NOTES

A draft is not authorization. Do not publish it as policy, connect it to automation, or rely on it for consequential decisions without the required approval.

One ordinary use will reveal what the room could not.

INTENDED USER

TEST DATE

ORDINARY, LOW-RISK CASE

HOW FEEDBACK WILL BE RECORDED

Observe

☐ Where the user pauses

☐ What they ask

☐ What they skip or reorder

☐ What information is missing

☐ Which instruction is vague

☐ Whether the finish line is clear

What did you still have to know that this guide did not tell you?

WHAT HAPPENED

CHANGES MADE IN V0.2

OWNER DECISION

NEXT ACTION AND DATE