

FIELD WORKSHOP

PROCESS ARCHAEOLOGY

Excavate the know-how that keeps everyday operations moving.

Turn one unwritten process into a guide your team can test

Alex handles service requests for a small property-maintenance company.

The written process has three steps:

READ REQUEST → ADD TO CALENDAR → TELL CREW

Tuesday morning, Alex is out. Sam covers the requests.



INCOMING REQUEST / 8:07 A.M.

One request reaches Sam.

Returning customer. Caldera Point property. Water stain spread overnight. No photo attached.

CUSTOMER ASKS: CAN YOU PROMISE SOMEONE BEFORE 3:00?

Can Sam schedule the visit?



VOICEMAIL + WEB FORM

Before anyone schedules the visit, the team needs six answers.

Where did the request arrive?

Does 'spread overnight' signal urgency?

Is a photo required?

Who owns Caldera Point?

Does a returning customer take a shorter path?

Who may promise an arrival time?

ALEX'S REMEMBERED CLAIMS / 8:18 A.M.

Alex had been carrying six working claims in memory.

Sam later learns:

COMBINE VOICEMAIL AND WEB-FORM DETAILS
'SPREAD OVERNIGHT' REQUIRES URGENT REVIEW
NO PHOTO, NO SCHEDULING
CALDERA POINT GOES TO CREW B
RETURNING CUSTOMERS SKIP THE INTRO CALL
ONLY THE OWNER MAY PROMISE A TIME



THE ROUTE BECOMES VISIBLE

SOURCE PACKET / FOUR LABELS

The source labels reveal which claims are ready to use.

OBSERVED

Requests arrive in two channels.

REMEMBERED

Returning customers skip the intro call.

APPROVED

Only the owner may promise a time.

UNRESOLVED

Does every urgent request require a photo?

The first AI draft invents three decisions.

DRAFT SAYS

Respond within two hours.

Assign the nearest technician.

Schedule urgent requests without a photo.

SOURCE PACKET SAYS

No response threshold supplied.

Caldera Point goes to Crew B.

Photo rule still needs confirmation.

Which line would create the most trouble?

The finished first version shows what to do - and where to stop.

SERVICE REQUEST HANDOFF CHECKLIST

START: A request arrives in either channel.

DONE: A complete summary is routed or held for review.

- 1 COMBINE BOTH CHANNELS
 - 2 MARK RETURNING-CUSTOMER STATUS
 - 3 FLAG 'SPREAD OVERNIGHT' FOR URGENT REVIEW
 - 4 SEND CALDERA POINT TO CREW B
 - 5 [CONFIRM] PHOTO RULE FOR URGENT REQUESTS
- STOP OWNER APPROVES ANY TIME PROMISE



METHOD / BEFORE AI

Evidence comes first. AI enters after the route is visible.

Investigate the process as it happens now.

COLLECT TRACES → INTERVIEW THE PROCESS → RECONSTRUCT THE ROUTE

TODAY'S OUTPUT / FIELD GUIDE V0.1

Today's finish line is a field-testable v0.1.

Your Process Field Guide will contain:

CURRENT ROUTE
ONE WORKING ARTIFACT
STOP-AND-ASK CONDITIONS
OWNER + REVIEWER
UNRESOLVED QUESTIONS
VERSION + TEST DATE

Use Field Kit pages 2-15 as the working record.

THE METHOD / SEVEN MOVES

Seven moves turn hidden knowledge into a testable guide.

CHOOSE THE DIG SITE → COLLECT TRACES → INTERVIEW THE PROCESS

WRITE THE CURRENT ROUTE → CHOOSE THE FORMAT → USE AI TO ORGANIZE → TEST THE DRAFT

FIELD NOTE / 01

CHOOSE THE DIG SITE

Start narrow enough to finish.

FIELD KIT / PAGE 2



A workable process has a clear start, finish, and user.

Write one sentence for each:

TRIGGER – WHAT STARTS IT?

DEFINITION OF DONE – WHAT PROVES IT IS FINISHED?

INTENDED USER – WHO MUST BE ABLE TO FOLLOW IT?



Every process leaves traces.

List what the process leaves behind:

ROUGH NOTES · FORMS · SCREENSHOTS
RECURRING QUESTIONS · EXAMPLES · HANDOFFS

What evidence would a newcomer need to see?



PAIRED EXCAVATION / ROLES

Your partner listens for what the routine leaves unsaid.

PROCESS HOLDER

Describe what happens.

Show examples.

Name exceptions.

Say when you stop.

EXCAVATOR

Ask what changes the path.

Listen for 'usually.'

Record missing inputs.

Leave redesign for later.

The useful questions live behind 'usually' and 'it depends.'

What must already be true?

What do you notice first?

Which steps happen every time?

Where can the path split?

What information is often missing?

What gets handed off?

What should never be guessed?

Who may approve an exception?

What proves it is complete?

Where does it break down?

ROUND 1 / 6 MINUTES – SWITCH – ROUND 2 / 6 MINUTES

Current practice and future improvements need separate maps.

Arrange the evidence in this order:

TRIGGER → INPUTS → STEPS → DECISIONS
HANDOFFS → ESCALATION → DEFINITION OF DONE



SOURCE CHECK / FOUR LABELS

Every important claim carries a source label.

OBSERVED

Seen in actual work.

REMEMBERED

Supplied from experience.

APPROVED

Confirmed by an authorized source.

UNRESOLVED

Needs evidence or review.

Do not settle an unresolved point by making it sound plausible.

FIELD NOTE / 02

CHOOSE THE FORMAT

Use one artifact for this first version.

FIELD KIT / PAGES 6-10



ARTIFACT CHOICE / FOUR OPTIONS

The route tells you which format fits.

CHECKLIST

Short, repeated, mostly linear.

SOP

Sequence, context, roles, and handoffs.

INTAKE FORM

Missing information blocks the work.

DECISION GUIDE

Rules or approvals change the path.

Safe drafting begins with the smallest allowed source packet.

Prepare the smallest useful source packet.

REMOVE NAMES, CONTACT DETAILS, AND ACCOUNT NUMBERS

GENERALIZE SENSITIVE CASES

KEEP PERSONNEL, MEDICAL, STUDENT, FINANCIAL, AND CONFIDENTIAL RECORDS OUT

When the rule is unclear, use the paper route.



AI organizes. People decide what is true, allowed, and approved.

AI MAY

- Organize steps
- Group questions
- Draft the selected format
- Flag ambiguity
- Compare draft to source

PEOPLE MUST

- Provide truthful sources
- Resolve exceptions
- Protect private information
- Approve consequential rules
- Test and authorize use

AI INSTRUCTION / SOURCE-BOUND DRAFT

Give AI a boundary before you give it a task.

USE ONLY THE SOURCE NOTES. DO NOT INVENT RULES, THRESHOLDS, OR MISSING STEPS.

MARK GAPS [CONFIRM]
KEEP SOURCE LABELS
LIST ASSUMPTIONS + CONTRADICTIONS

The complete drafting prompt is in Field Kit pages 11-12.

AI INSTRUCTION / CHOOSE ONE ENDING

Each format asks AI to solve a different writing problem.

CHECKLIST

Repeated actions, inputs, completion checks, stop conditions.

SOP

Purpose, roles, procedure, handoffs, exceptions, records.

INTAKE FORM

Required questions, conditional questions, routing, exclusions.

DECISION GUIDE

Approved criteria, branches, approvals, escalation.

Choose one ending in Field Kit page 12, then compare the draft with your sources.

FIELD NOTE / 03

TEST THE DRAFT

Test it before anyone relies on it.

FIELD KIT / PAGE 13



Three cases expose three different kinds of gaps.

NORMAL CASE

Can someone complete the process without asking for help?

COMMON EXCEPTION

Does the guide show what changes when the usual path breaks?

NEWCOMER CASE

What would a newcomer still need explained?

Fix the route before improving the wording.

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

Complete the approval record:

PROCESS OWNER • REQUIRED REVIEWER
STOP CONDITIONS • UNRESOLVED QUESTIONS
VERSION • STATUS • NEXT REVIEW DATE

Do not publish, automate, or treat the draft as policy because it exists.



FOLLOW-UP / WITHIN SEVEN DAYS

One ordinary use will reveal what the room could not.

Choose one intended user and one ordinary, low-risk case.

OBSERVE PAUSES · QUESTIONS · SKIPPED STEPS
MISSING INFORMATION · VAGUE INSTRUCTIONS · UNCLEAR FINISH LINE

Revise to v0.2 and record the owner's decision.



CLOSING QUESTION / LIVING ARCHIVE

The next test has one essential question.

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

YOUR NEXT TEST / WITHIN 7 DAYS



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PROCESS ARCHAEOLOGY / KEEP THE FIELD NOTES MOVING

