



# Delegate CX

## Internal Process Template

At the heart of a scalable, growth-minded business is a solid core of processes. We've created this easy template for you to begin documenting your processes.

Process Name

Process/Document Number

Department Name

Revision No.

Effective Date/Latest Revision

## Completion Expectations and General Notes

How often do you perform the process?

How long to complete one process?

How many times a day/week/month is this process performed?

List any expectations the responsible party should know:

List any additional notes for completing the process here: (Ex: Completion Date, Approvals, etc)



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## Procedure Details

This is the critical area of the Process Document. List out every possible step required to complete the steps. Go in sequential order and do your best to include all possible scenarios.

## Terms and Definition

Many processes include industry specific words to accomplish the tasks. Include those here. The software needed is often included in this section.



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## Attachments

Include references to any essential attachments required to complete.  
An example would be an Excel Template for product uploads.

## Internal Details

Revision Number:

Effective Date/Latest Revision

Revision Number: (Name of the release. We usually call the first release the "Initial Release.")

Prepared By: (Name of person who wrote process)

Reviewed By: (Who needs to view before approval?)