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**PROCESS DOCUMENTATION, LEADERSHIP, AND ICE
CREAM: A CASE STUDY**

Paige McAfee

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LEADERSHIP CHALLENGES



Coaching and Training

- Communicating how and why changes must occur



Knowledge Management

- Difficulty transferring soft skills
- Easy access to important information at all organizational levels



Succession Planning

- Disruptions when key leaders change
- Difficulty transferring all relevant knowledge to new leaders



Continuous Improvement

- Sustaining efforts for long periods of time
- Requires extensive leadership dedication

WHAT IS PROCESS DOCUMENTATION?

“Process documentation is the method of internally capturing all the information necessary to properly execute a business process within your organization.” (Guerrero, 2021)

Process documentation is...

- Continuous
- Detailed
- Clearly written

Process documents may include...

- Responsibilities and ownership
- Length/time
- Step-by-step explanations

PROCESS DOCUMENTATION AS A SOLUTION



Helps identify process flaws

- Demonstrates objective need for change (gaps between processes and most efficient methods)
- shows progress and motivates employees



Provides basis for training materials

- Aids teaching, problem-solving, and clarification
- Empowers employees and makes them feel valued

Gives new leaders information necessary to minimize disruptions during initial leadership transfer

Standardizes practices

- Avoids “reinventing the wheel”
- Maximizes efficiency



LEADERSHIP CHALLENGES AT GREEN OAKS CAMPGROUND

Untrained employees

- No formal training process
- Difficult time resolving common issues
- Not enough staff to handle rushes

Minimal succession planning efforts

- Little to no onboarding processes for new employees
- Incomplete information for next owner

Lack of standardization/accountability

- No standard order-writing method
- Different perspectives on scoop sizing



PROCESS DOCUMENTATION SOLUTIONS AT GREEN OAKS

Development of formal training procedures

- Cross-train employees
- Create training materials based on process documents
- Set up posters and checklists throughout workspace
- Introduce objective quality standards

How does this help?

- Gives employees easy access to necessary information
- Empowers front-line workers to act independently
- Reduces disruptions if key leaders leave
- Promotes fairness and reduces stress

Active succession-planning

- Document implicit and explicit knowledge to pass to next leader
- Organize information intuitively

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