Process Documentation, Leadership, and Ice Cream: A Case Study

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

Paige McAfee
M.S. in Leadership
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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

Active succession-planning
• Document implicit and explicit knowledge to pass to next leader
• Organize information intuitively

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
REFERENCE:

Questions?