**Business Process Document Template**

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**Business Process Document**

**<Project Name>**

**Company Name**

**Street Address**

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**Date**

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# Introduction

The Business Process Document is a document which provides a detailed description of a business process which is designed to meet an identified business need. To be effective, business processes must be formally designed, structured, documented, and communicated. It is important to capture as much detail as possible in the process description verbally, graphically, or using both methods. By doing so, all individuals and groups using the process will be able to more easily achieve the desired results. While business process documents may contain many different sections, there are some sections common to all business documents. This template is intended to provide an example of common and effective business document contents.

This Business Process Document has been developed for use in Acme Corporation’s Personnel Staffing efforts. Historically, Acme Corporation has under-performed in fulfilling its staffing requirements due to inefficient practices and lack of a formal process. Personnel Staffing has been identified as a key area of improvement by Acme Corporation’s executive leadership. This process will allow Acme Corporation to more effectively identify and fill its staffing needs by implementing a repeatable and standardized personnel staffing process with participation from each division.

# Explanation of Business Process Document

Business Processes are effective ways to improve business performance, increase workforce and resource efficiencies, and perform value-added functions to meet critical needs. To be effective, a business process should also be easily integrated with other processes and the organizational structure. As potentially useful and effective as business processes are, often times they’re poorly planned, implemented, or communicated. In such cases, a process may result in confusion and create an even more ineffective environment than previously existed. When planning, implementing, and communicating a new business process, it is important to provide structure, a formal process flow, process boundaries, inputs/outputs, and control points. This will allow the organization to not only achieve improved performance, but to have a mechanism to continually improve the business process.

Process Purpose: This section should provide a description of the purpose of the process. This may include why and how the process will benefit the organization.

Process Scope: This section should provide a description of what is included in the business process as well as what is not included or is out of scope for the process.

Process Input: All business processes have an input or a need to be fulfilled. This need or input is what initiates the process to begin. This section should identify the need or input required to initiate the process.

Process Boundaries: Process boundaries are a way of identifying where a process begins and where it ends. For example, there may be a need or input that initiates a process but is not actually a part of the process. The boundaries of the process must be clearly defined, documented, and communicated.

Process Flow: Many business process documents provide the process flow in a graphical format. Some provide the flow in a verbal format. Some provide both. This may depend on organizational standards. However, it is imperative that some detailed description of the flow of the process is provided. Without this, the process becomes open to interpretation and will suffer from a lack of formality and clarity. This section should describe each step of the process from beginning to end.

Process output: All business processes have an output or result that they must achieve. This is directly tied to the process purpose. While the output may not necessarily be a formal part of the process itself—depending on where the boundary is established—it is an integral part of the document as it explains what it expected upon completion of the process. This section should provide an explanation of the process’s output.

Exceptions to Normal Process Flow: Often, a business process will not follow its normal work flow from beginning to end as there may be many variables involved in the process. This section should explain where exceptions to the flow may occur and what steps will be taken in such an instance.

Control Points and Measurements: Business processes are not without risk and uncertainty. Nor are they exempt from any type of efforts to continuously monitor and improve them. Control points should be established at various points of the process flow where risks have been identified. This helps the process owner monitor risks associated with the process and is useful in ongoing process improvement efforts. Measurements are also necessary for determining the effectiveness of a process and performing process improvement. Measurements may coincide with control points in an effort to identify where risks or problems may reside and to determine a methodology for improving the process around these risks and problems.

# Sample Business Process Document

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name of Process:** | | Personnel Staffing Process | | |
| **Process Owner:** | | D. Smith | | |
| **Created By:** | | Acme Corporation | **Last Updated By:** | D. Smith |
| **Date Created:** | | 4/1/xx | **Last Revision Date:** | 4/15/xx |
|  |  | | | |
| **Process Purpose:** | The purpose of the Personnel Staffing Process is to improve Acme Corp.’s ability to swiftly and efficiently identify and fill personnel staffing requirements by implementing a standardized organizational process with participation from each division. | | | |
| **Process Scope:** | This process pertains only to internal staffing requirements. External requirements, such as contract support, are outside the scope of this process. | | | |
| **Process Input:** | The process input for the Personnel Staffing Process is the operational division’s identification of an internal staffing need. Once this input is identified, the Personnel Staffing Process will be initiated. | | | |
| **Process Boundaries:** | The activities immediately following the process input and immediately preceding the process output define the boundaries for the Personnel Staffing Process. Therefore, the Acme Corporation’s Personnel Staffing Process starting boundary is defined by Human Resources requesting a detailed job description and required skill sets from the operational division. The process’s ending boundary is defined by Human Resources receiving an official job acceptance from a qualified candidate. | | | |
| **Process Flow:** | 1. Acme Corp. operational division identifies a staffing need and notifies Human Resources (input) 2. Human Resources provides the operational division with a data sheet soliciting a detailed job description and a list of key skill sets needed by potential applicants 3. Human Resources receives completed data sheet and acquires approval through executive staff to solicit for candidates to fill the staffing need 4. Human Resources posts the solicitation on existing job boards and Acme Corp. web site with detailed job description, skill sets, and application deadline date 5. Upon application deadline date, Human Resources compiles list of applications and forwards to operational division for screening 6. Operational division screens qualified applicants and provides Human Resources with names of applicants for initial interviews 7. Human Resources schedules interviews with candidates and operational division 8. Upon completion of initial interviews, operational division notifies Human Resources of names of candidates for second interviews 9. Human Resources Division schedules second interview with candidates and operational division 10. Following second interviews the operational division notifies Human Resources of its selection. 11. Human Resources notifies the selected candidate and sends the candidate an offer letter 12. Human Resources receives the candidate’s signed offer letter 13. Human Resources initiates the creation of a new personnel folder for the candidate and schedules a start date (output) 14. Personnel Staffing Process ends and new employee is handed off to New Employee Onboarding Process | | | |
| **Process Output:** | The output for this process is a newly hired and qualified employee to fill organizational needs in the requesting operational division | | | |
| **Exceptions to Normal Process Flow:** | 1. In steps 8-10, if no interviewed candidates are deemed qualified, then the job description and key skill sets will be re-written by the operational division, re-submitted to Human Resources, and the Personnel Staffing Process will begin again 2. In step 11, if candidate does not sign and return the offer letter, a successful alternate candidate will be notified and made an offer | | | |
| **Control Points and Measurements:** | 1. A control point and measurement is established in step 6 of the process flow. The process owner will continuously measure the number of qualified applicants responding to staffing solicitations. If these numbers are low or there are a large number of applicants who are not qualified, then steps will need to be taken to improve the quality and detail of the solicitation to include: more specific list of required skill sets, more specific detail of required qualifications, more specific detail of beneficial qualifications and skill sets. 2. A control point and measurement is established in step 12 of the process flow. If significant numbers of candidates receiving offer letters do not accept the offer, steps will need to be taken to determine why the offer was not accepted to include: a review of benefits package offered, a review of salary offered, a review of first and second interviews of the candidate. | | | |

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# Sample Business Process Flow Diagram

Operational Division (Op Div) identifies staffing need and notifies HR

**Input**

**Process**

HR provides Op Div with Data Sheet to fill out

HR posts solicitation for applicants

HR receives data sheet and gets executive approval

HR compiles applicants and sends to Op Div

HR schedules initial interviews

Op Div screens applicants and gives names to HR

Op Div completes initial interviews and notifies HR of names for second interviews

Following interviews Op Div notifies HR of its selection

HR schedules second interviews with candidates and Op Div

HR notifies candidate and sends candidate an offer letter

HR receives candidate’s signed offer letter

**Output**

If candidate does not accept offer, the next qualified applicant is made an offer

HR creates new personnel folder for candidate and schedules start date

Candidate officially hired and New Employee Onboarding Process begins

If no candidates are qualified, data sheet is revised with more detailed requirements/qualifications and process starts from beginning

Sponsor Acceptance

Approved by the Project Sponsor:

Date:

<Project Sponsor>

<Project Sponsor Title>

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