EOS Core Process Name: [Clear, action-oriented title]

Process Owner: [Person from EOS Accountability Chart]
Last Updated: [Date]
Review Date: [Next quarterly review date]

EOS Integration

Connected EOS Tools:
Related EOS Rocks: [Current quarter Rocks that improve this process]
EOS Scorecard Metrics: [Weekly numbers tracked for this process]
Accountability Chart Connection: [Which seat owns this process]

Process Overview

Purpose: [Why this process exists - customer/business value it creates]

Inputs: [What triggers this process to start]
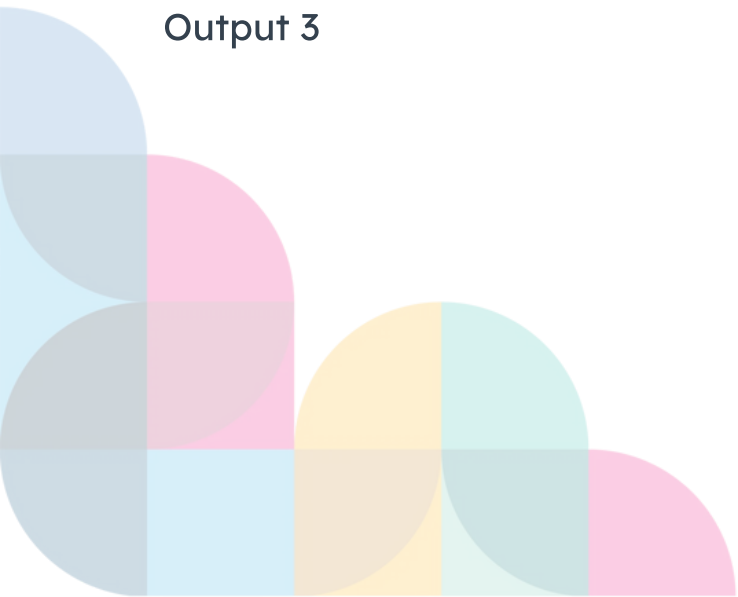Trigger 1
Trigger 2
Trigger 3

Outputs: [What this process produces/delivers]
Output 1
Output 2
Output 3

Core Process Steps

Step 1: [Action Verb + Clear Description]
Who: [Role responsible]
What: [Specific action to take]
When: [Timing/deadline]
Quality Standard: [How to know it's done right]

Step 2: [Action Verb + Clear Description]
Who: [Role responsible]
What: [Specific action to take]
When: [Timing/deadline]
Decision Point: [If applicable - criteria for choosing path A vs B]

Step 3: [Continue for 5-15 steps total]

Quality Standards & Success Metrics

Must-Have Standards:
[ ] Standard 1 (measurable)
[ ] Standard 2 (measurable)
[ ] Standard 3 (measurable)

EOS Scorecard Metrics:
Weekly Metric 1: [Target number]
Weekly Metric 2: [Target number]
Monthly Metric: [Target number]

Process Connections

Receives From: [Which EOS core process feeds into this one]
Hands Off To: [Which EOS core process this feeds into]
Dependencies: [Other processes or resources needed]

Tools & Resources

Required Systems/Tools:

Tool 1
Tool 2

Template/Document links

Training Materials:
Link to training video
Link to detailed SOPs (if needed)
Onboarding checklist

Troubleshooting & Common Issues

If [Problem], Then [Solution]:
Problem 1 → Solution 1
Problem 2 → Solution 2
Problem 3 → Solution 3
Escalation: [When to involve process owner or leadership team]

Process Improvement

Last Quarter's Improvements: [What was changed and why]
Current Issues to Address: [Items for next EOS Rock or Level 10 discussion]
Issue 1
Issue 2

Ideas for Next Quarter: [Potential improvements to consider]

Approval & Sign-Off

Process Owner Approval: [Name + Date]
Leadership Team Review: [Date reviewed in Level 10 or quarterly]
Next Review Date: [Align with EOS quarterly cycle]

Quick Reference Card

[One-page summary of key steps for daily use]

The 5 Key Steps:

[Step 1 summary]
[Step 2 summary]
[Step 3 summary]
[Step 4 summary]
[Step 5 summary]

Key Metrics: [2-3 most important numbers to track]

Emergency Contacts: [Who to call if process breaks down]