

Business Strategy / SOP Creation

Interview subject matter experts and extract step-by-step processes to document as standard operating procedures.

Difficulty: Intermediate → Advanced

Model: GPT-4 / Claude / Gemini

Use Case: Process Documentation, SOP Creation, Knowledge Capture

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Why This Prompt Exists

Most processes live in employees' heads — not documented anywhere.

You get:

- tribal knowledge that leaves when employees leave
- inconsistent execution (different people, different methods)
- no training materials for new hires
- processes that can't be improved because they aren't documented
- wasted time figuring out how to do tasks

But process discovery is not guesswork.

It is interviewing the people who know.

- Interviews: ask about steps, decisions, exceptions
- Observation: watch the process in action
- Step extraction: break down into discrete actions
- Decision points: where choices are made
- Handoffs: where responsibility transfers

Without discovery, SOPs are incomplete.

This framework forces AI to extract processes from subject matter experts.

The Prompt

Assume the role of a process documentation specialist who extracts knowledge from subject matter experts.

Your task is to discover and document a process.

Generate:

1. PROCESS NAME AND GOAL

- What process are we documenting?
- What outcome does it achieve?

2. STEP-BY-STEP EXTRACTION

- List of steps in order
- Sub-steps where needed

3. DECISION POINTS

- Where choices are made
- Conditions for each path

4. ROLES AND RESPONSIBILITIES

- Who performs each step
- Handoffs between roles

5. EXCEPTIONS AND EDGE CASES

- What can go wrong?

- How to handle exceptions

6. TIME ESTIMATES

- How long each step takes
- Total process time

7. INTERVIEW QUESTIONS FOR SME

- Questions to ask the expert

INPUTS:

Process Name:

[INSERT]

Process Owner/Role:

[INSERT]

Known Steps (if any, partial list):

[LIST OR "UNKNOWN"]

Inputs (what starts the process):

[DESCRIBE]

Outputs (what the process produces):

[DESCRIBE]

Frequency (how often process runs):

[DAILY / WEEKLY / MONTHLY / AS NEEDED]

RULES:

- Interview questions must be open-ended (not yes/no)
- Step extraction: break down into discrete actions
- Decision points: if-then logic
- Handoffs must be clear between roles
- Exceptions: plan for what can go wrong
- Time estimates: be realistic (include buffer)
- Validate documented process with SME before finalizing

How To Use It

- Interview the person who does the process most often.
- Watch them do the process (don't just ask).
- Ask "what could go wrong?" for each step.
- Validate the documented process back with the SME.
- Document processes before the expert leaves the company.

Example Input

Process Name: New Client Onboarding

Process Owner/Role: Client Success Manager

Known Steps: Sign contract, schedule kickoff call, send welcome email, set up account, introduce to team

Inputs: Signed contract from sales team

Outputs: Fully onboarded client, active account, kickoff meeting completed

Frequency: AS NEEDED (when new clients sign)

Why It Works

Most tribal knowledge is never documented.

This framework improves outcomes by forcing:

- step-by-step extraction (granularity)
- decision point identification (conditional logic)
- role and handoff clarity (accountability)
- exception planning (risk management)
- time estimation (workload planning)

Great process discovery captures knowledge before it walks out the door.

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