

Process Template

Copy this page when creating a new Core Process. Replace all placeholder text in [brackets].

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[Process Name]

Purpose

[Why does this process exist? What problem does it solve? One or two sentences.]

Owner

[Full name] — [Seat / Role]

The owner is accountable for this process producing the right result consistently. They are not necessarily the person who executes every step.

Trigger

This process starts when: [describe the event or condition that initiates this process — e.g., “a new trial signup is confirmed in Mautic”, “a GitHub release tag is created”, “a support ticket is opened in FreeScout”].

Steps

1. **[Step name]** — [Description of what happens, who does it, and which tool is used]
2. **[Step name]** — [Description]
3. **[Step name]** — [Description]
4. **[Step name]** — [Description]
5. **[Step name]** — [Description]

Output

The process is complete when: [describe what a successful completion looks like — e.g., “the customer has logged into the platform and completed their first framework mapping”, “the release is published on GitHub and the blog post is live”].

Tools

- [Tool name] — [what it is used for in this process]
- [Tool name] — [what it is used for in this process]

Notes / Exceptions

[Any edge cases, exceptions, or known issues with this process. Leave blank if none.]

Revision History

Date	Change	Updated by
[YYYY-MM-DD]	Initial version	[Name]

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