

SOPs and Training Materials in Half the Time

March 10, 2026 | Operations + Work Systems

Turn rough process notes and experienced employees' knowledge into SOPs and usable training materials.

March 10, 2026

With Cheryl Thompson

Who it is for

Process owners, trainers, and operations leaders

Inside this playbook

10 copyable prompts and practice blocks.

[Open the online playbook](#)

The recorded session

Watch the Learning Lab.

Follow the session, then use the playbook with your own work.

[Watch replay on Vimeo](#) ^[1]

What to take into your work

1. Capture the details experienced people carry in their heads.
2. Turn rough process notes into a usable procedure.
3. Check training material with the people doing the work.

Use the learning

Your playbook

Choose a prompt, replace the bracketed inputs, and work through it in your approved AI tool. Review the result and adapt it to your situation.

This playbook accompanies the March 10, 2026 session. Tool names and setup steps reflect that session; available features may differ in your account.

Welcome to Your AI Toolkit

Your best processes aren't written down. Your most experienced people carry critical knowledge in their heads. And when someone finally sits down to create documentation, it takes forever - and no one reads it anyway. This playbook gives you **three AI prompts** that turn the documentation grind into a system: capture tribal knowledge fast, turn rough notes into structured SOPs, and build training materials that new hires can actually use.

- You don't need to use everything at once. Start with the one prompt that solves your most immediate problem.
- These prompts work across platforms: Copilot, ChatGPT, Gemini, Claude, or your company's internal AI tool.
- Each prompt includes a main version (for licensed tools with full context windows) and an alternate version (for free Copilot or tools with limited input).

How to Use This Playbook

- **Start with Prompt #1.** Take rough notes or bullet points from any process and let AI build a structured SOP with a checklist and rationale.
- **Build training materials.** Use Prompt #2 to convert any SOP into onboarding-ready content that new hires can actually follow.
- **Capture what's in your head.** Use Prompt #3 when the process isn't written down anywhere — AI interviews you and pulls the knowledge out step by step.
- **Give AI context before asking for help.** The more specific you are about your environment, equipment, and safety requirements, the more accurate the output.
- **Review and refine.** AI gives you a strong first draft. Your subject matter experts make it accurate, safe, and compliant.

The Knowledge Capture Spectrum

Most organizations have documentation in five states. Know where yours sits - and what to fix first.

State	What It Looks Like	Risk Level	What to Do
Tribal Knowledge	Lives in one person's head. If they leave, it walks out the door.	● Critical	Capture it now with Prompt #3.

State	What It Looks Like	Risk Level	What to Do
Rough Notes	Someone wrote something down, but it's incomplete, outdated, or unreadable.	● High	Turn it into an SOP with Prompt #1.
Outdated SOP	Document exists but hasn't been updated in months or years.	● Medium	Audit and update with Prompt #4.
Current SOP, No Training	SOP is accurate but no one reads it or knows it exists.	● Medium	Build training materials with Prompt #2.
Living Documentation	Current SOP + training materials + regular review cycle.	● Low	Maintain with quarterly audits.

Key Insight: The goal isn't perfect documentation. It's **usable documentation that someone other than the original expert can follow**. AI gets you from rough notes to usable draft in minutes instead of hours. **The Documentation Hierarchy**

- **SOP (Standard Operating Procedure):** The detailed, step-by-step "how." The source of truth.
- **Quick-Reference Checklist:** The one-page "don't forget" version. Lives at the workstation.
- **Training Guide:** The "here's how to learn this" version. Built for someone who's never done it.
- **Visual Work Instruction:** The "show, don't tell" version. Diagrams, photos, numbered steps.

The AI Efficiency Ladder

Know where you are. Know where you're going.

Level	What It Looks Like	Time / Task
1. On-the-Fly Prompting	Opening an AI chat, typing a question, getting an answer. Starting from scratch every time.	5–10 minutes, inconsistent
2. Repeatable Prompts	Saved templates you fill in. Same quality every time because same structure.	2–3 minutes, consistent
3. Custom AI Projects	AI pre-loaded with your context – your role, industry, frameworks. Works like a team member.	1–2 minutes, personalized

Level	What It Looks Like	Time / Task
4. Automation & Agents	AI connected to your systems, triggered automatically. Runs without you.	0 minutes, scales

Your goal: Move from Level 1 to Level 2. The prompts in this playbook get you there.

The Prompt Structure

Every strategic prompt has four parts:

Part	Purpose	Example
ROLE	Who should AI pretend to be?	"You are an operations documentation specialist in automotive manufacturing..."
CONTEXT	What does AI need to know about you?	"I manage a paint shop with 45 operators across 3 shifts..."
REQUEST	What specifically do you want?	"Create a step-by-step SOP from my bullet-point notes..."
QUESTION	Invite the AI to get as much information from you as possible.	"Please ask me any clarifying questions."

Key Prompts from This Lab

This lab teaches three prompts that work as a sequence - Capture, Structure, Train.

Prompt #1: The SOP Generator

What it's for: Taking rough notes, bullet points, or a verbal brain dump and turning them into a structured Standard Operating Procedure with a step-by-step process, a quick-reference checklist, and a rationale paragraph. **When to use it:** When you have notes from a process but no formal documentation. When a subject matter expert explains how something works and you need to capture it before it's forgotten.

Main Version (Licensed Copilot / ChatGPT / Gemini)

Use when you can provide full context about your process, environment, and requirements.

Main Version (Licensed Copilot / ChatGPT / Gemini)

PROMPT TO COPY

ROLE

You are an operations documentation specialist for the automotive industry. You have written hundreds of SOPs for manufacturing plants, dealerships, and service operations. You understand that good documentation is clear, specific, and written for the person doing the work — not the person who designed the process.

CONTEXT

I have rough notes, bullet points, or a verbal explanation of a process that needs to be formally documented. The documentation needs to be usable by someone who has never performed this task before, while also being accurate enough for experienced operators to verify.

REQUEST

Using the notes I provide, create the following:

1. STANDARD OPERATING PROCEDURE

- Title and document number placeholder
- Purpose: One paragraph explaining why this process exists and what happens if it's done wrong
- Scope: Who performs this task and when
- Safety/Compliance Notes: Any PPE, regulatory, or quality requirements (ask me if not in my notes)
- Equipment/Materials Needed: Complete list
- Step-by-Step Procedure: Numbered steps with enough detail that someone new could follow them. Include:
 - What to do
 - How to know you did it right (acceptance criteria)
 - Common mistakes to avoid
 - Decision points ("If X, do Y. If Z, do W.")
- Troubleshooting: 3–5 common problems and what to do
- Revision history placeholder

2. QUICK-REFERENCE CHECKLIST

- One-page version of the procedure
- Checkbox format
- Only the critical steps and safety items
- Designed to be laminated and posted at the workstation

3. RATIONALE PARAGRAPH

- 3–4 sentences explaining why this process matters for safety, quality, and delivery
- Written in plain language for a team huddle or training session

FORMAT

PROMPT TO COPY

- Use clear, plant-floor-friendly language. No jargon unless it's standard terminology for the role.
- Write for a high school reading level.
- Bold critical safety steps.
- Flag any steps where you need more information from me with [NEEDS INPUT].

QUESTION

Before generating the SOP, ask me:

1. What is the process? (title or brief description)
2. Where does this happen? (plant floor, service bay, office, etc.)
3. Who performs it? (role/job title)
4. Are there safety or compliance requirements I should know about?
5. What goes wrong when this process is done incorrectly?

Then ask me to paste my notes.

Alternate Version (Copilot Free / Limited Context)**PROMPT TO COPY**

I work in [ENVIRONMENT: plant floor / dealership / office] in the automotive industry.

Here are my rough notes on a process that needs documentation:

[PASTE NOTES]

Create:

1. A step-by-step SOP with numbered steps, safety notes, and common mistakes to avoid
2. A one-page checklist version I can print and post at the workstation
3. A short paragraph explaining why this process matters for safety, quality, and delivery

Write for someone who has never done this task before. Use simple, clear language. Flag anything you need me to clarify with [NEEDS INPUT].

Examples

Example 1: Manufacturing - Changeover Procedure for Stamping Press Line

Changeover on the 600-ton progressive die press. Two people. Need to run off remaining coil first or cut and remove. Lockout tagout the press. Disconnect air lines and sensors. Unhook the die from the bolster using T-bolts. Use the crane to pull the die — make sure spreader bar is rated and centered. Don't drag the die. Clean the bolster surface — any debris causes misalignment. Bring in new die on the cart, crane it in, center it on the locating pins. Bolt it down — torque pattern matters, go corner to corner not sequential. Reconnect air and sensors. Power up, jog the press through one full cycle with no material. Check shut height. Run 5 first-off parts and check dimensions against control plan. Get quality sign-off before running production. The trick: when you're setting shut height, experienced guys tap the adjusting nut with a brass hammer to seat it. If you skip that, the shut height drifts after 50 hits and you start making scrap. Also, always check the feed progression BEFORE you run first-offs — if the feed is off, you'll damage the pilot pins

Example 2: Dealership - Vehicle Delivery Process for New Car Handoff

New vehicle delivery. Day before: detail team preps the car — wash, interior clean, remove all plastic, check for damage. Delivery coordinator loads accessories if any were ordered. Charge the battery if it's an EV or hybrid. Day of: pull car to delivery bay 30 minutes before appointment. Sales consultant walks the customer through the vehicle — exterior walk-around, interior features, connect their phone via Bluetooth and CarPlay/Android Auto. Show them how to use FordPass app. Set up their profile in the infotainment system. Adjust mirrors and seat, save their settings. Go through the owner's manual highlights — maintenance schedule, warranty coverage, roadside assistance number. Walk them to F&I for paperwork signing. After F&I: give them both key fobs, show how to use the key features. Take a delivery photo for social media. Introduce them to the service department — walk them over, introduce by name to a service advisor. Explain how to schedule service through FordPass. Ask for the survey — explain what a 10 means and why it matters. The trick: pair their phone FIRST before anything else. If you save it for the end, they're excited to leave and rush through it, then they call back three times asking how to connect Bluetooth. Also: always check the gas tank. Nothing kills the moment like delivering a car with a quarter tank.

Example 3: Office/Warehouse - Receiving Inspection Process for Incoming Parts

Receiving inspection for incoming material. Truck arrives, unload to receiving dock. Check packing slip against PO in the system — quantities, part numbers, revision levels. Revision level is critical — wrong rev material can cause major quality escapes. Visual inspection of packaging — look for damage, water exposure, contamination. Open sample containers per the sampling plan in the control plan — usually AQL Level II, but some parts are 100% inspect. Use the inspection checklist for that part number — dimensions, material cert review, surface condition. Check material certs against spec requirements — chemistry, hardness, heat treatment if applicable. For plated parts, check plating thickness with the XRF gun. If anything fails — quarantine the material immediately, tag it with red reject tag, enter a DMR in the quality system, notify the buyer. If it passes — move to approved stock area, update system receipt, attach green accept tag. The trick: always check the REVISION LEVEL first before you inspect anything else. If the rev is wrong, nothing else matters — send it back. Also: for steel bar stock, always check the straightness. The spec says .010 per foot but anything over .005 causes problems in our CNC lathes. The machine operators will reject it even if it technically meets spec. Also: certain suppliers consistently ship material certs from the wrong heat lot. Check the heat lot number on the cert against the heat lot stamped on the material. If they don't match, quarantine it.

Prompt #2: The Training Material Builder

What it's for: Converting an existing SOP or process document into training materials that new hires can actually learn from - including a training guide, knowledge check questions, and a day-one cheat sheet. **When to use it:** When you have a good SOP but people still don't follow it. When onboarding new employees and you need materials that go beyond "read this 40-page manual."

Main Version (Licensed Copilot / ChatGPT / Gemini)

Use to turn documentation into effective training content.

Main Version (Licensed Copilot / ChatGPT / Gemini)

PROMPT TO COPY
ROLE You are a training development specialist for the automotive industry. You build training materials that work for adult learners on the plant floor, in the service bay, and in the office. You understand that most people don't learn by reading a manual — they learn by doing, seeing, and being guided through the process. CONTEXT

PROMPT TO COPY

I have an SOP or process document that needs to become training material. The audience is [NEW HIRES / CROSS-TRAINING EMPLOYEES / CONTRACTORS] who have [LIMITED / SOME / SIGNIFICANT] experience in this area.

REQUEST

Using the SOP or process document I provide, create:

1. TRAINING GUIDE (Instructor-Led)

- Learning objectives (what the trainee will be able to do after training)
- Pre-requisites (what they need to know before starting)
- Step-by-step training walkthrough:
 - Explain the step
 - Demonstrate (instructions for the trainer)
 - Practice (what the trainee does)
 - Verify (how to confirm they did it right)
- Common questions new learners ask (with answers)
- Estimated training time

2. DAY-ONE CHEAT SHEET

- One page maximum
- The 5–7 most critical things a new person needs to remember
- Written as simple do/don't statements
- Include "If you're not sure, ask [ROLE]" for critical decisions

3. KNOWLEDGE CHECK

- 5–8 questions to verify the trainee understood the process
- Mix of multiple choice and short answer
- Include at least 2 scenario-based questions ("What would you do if...?")
- Answer key included

4. 30-DAY COMPETENCY TRACKER

- Checklist of skills the trainee should demonstrate within 30 days
- Space for trainer sign-off on each skill
- Progressive: observation → guided practice → independent performance

FORMAT

- Write at a conversational level. No corporate jargon.
- Use "you" language ("Next, you'll check the..." not "The operator shall verify...")
- Design for printing. Include clear section breaks.

QUESTION

Before generating, ask me:

1. What's the process or SOP I want to turn into training?
2. Who's the audience? (role, experience level)
3. How is training currently delivered? (classroom, on-the-job, shadowing)
4. What's the biggest mistake new people make with this process?

PROMPT TO COPY

Then ask me to paste the SOP or describe the process.

Alternate Version (Copilot Free / Limited Context)**PROMPT TO COPY**

I need to train [ROLE] on this process in [ENVIRONMENT: plant / dealership / office].

Here is the SOP or process description:

[PASTE SOP OR NOTES]

Create:

1. A training guide with step-by-step instructions a trainer can follow (explain, demonstrate, practice, verify for each step)
2. A one-page cheat sheet with the 5-7 most critical things a new hire needs to remember on day one
3. 5-8 knowledge check questions (include 2 scenario-based: "What would you do if...?")

Write conversationally. Use "you" language. Design for someone with little or no experience in this role.

Prompt #3: The Process Capture Interview

What it's for: Extracting tribal knowledge from an expert's head when nothing is written down. AI acts as a documentation interviewer, asking structured questions to pull out every step, decision point, and "thing you just know" that makes a process work. **When to use it:** When your most experienced person is about to retire, transfer, or go on leave. When a critical process has never been documented. When you know that something works but can't explain how to a new person.

Main Version (Licensed Copilot / ChatGPT / Gemini)

Use when you need to extract undocumented knowledge from a subject matter expert.

Main Version (Licensed Copilot / ChatGPT / Gemini)

PROMPT TO COPY

ROLE

You are a process documentation interviewer for the automotive industry. Your specialty is extracting tribal knowledge — the undocumented expertise that experienced operators, technicians, and managers carry in their heads. You know how to ask the right questions to surface not just the obvious steps, but the decision points, workarounds, warning signs, and "things everyone just knows" that make a process actually work.

CONTEXT

I am a subject matter expert (or I'm sitting with one) and I need to document a process that currently exists only in someone's head. I'll describe the process in my own words, and I need you to interview me systematically to capture everything.

RULES FOR THE INTERVIEW

1. Start with the big picture: Ask me to describe the process in 2–3 sentences — what it is, when it happens, and why it matters.
2. Then go step by step. For each step, ask:
 - What exactly do you do?
 - How do you know it's done right?
 - What could go wrong here?
 - Is there a trick or shortcut that experienced people know?
 - What tools, materials, or equipment do you need?
 - Are there safety or quality checkpoints?
3. Ask about decision points: "Is there a place where you choose between two paths? What determines which path?"
4. Ask about exceptions: "What happens when things don't go as planned? What do you do differently?"
5. Ask about timing: "How long does each step take? Is there a sequence that matters?"
6. Ask about handoffs: "Who do you pass this to next? What do they need from you?"
7. After capturing all steps, summarize back to me in a structured format and ask me to verify, correct, or add anything.

OUTPUT

After the interview is complete, produce:

1. A draft SOP based on everything I told you
2. A list of items flagged as [NEEDS VERIFICATION] — things that should be confirmed by a second expert or supervisor
3. A list of [TRIBAL KNOWLEDGE GEMS] — the tips, tricks, and insights that aren't in any manual but make the process work

tone

Conversational and patient. This should feel like talking to a colleague who's genuinely curious, not filling out a form. If I give a vague answer, push gently for specifics.

QUESTION

PROMPT TO COPY

Let's begin. Tell me: What process are we documenting today, and why is it important to get this right?

Alternate Version (Copilot Free / Limited Context)**PROMPT TO COPY**

I need to document a process that only exists in my head (or an expert's head). Act as a documentation interviewer.

The process is: [BRIEF DESCRIPTION]

It happens in: [ENVIRONMENT]

It matters because: [WHY]

Interview me step by step:

- Ask what I do at each step
- Ask how I know it's done right
- Ask what could go wrong
- Ask about tricks or shortcuts experienced people know
- Ask about decision points and exceptions

After the interview, create:

1. A draft SOP from my answers
2. A list of items that need verification
3. A list of tribal knowledge tips that aren't in any manual

Start by asking me to walk you through the process from the beginning.

Prompt #4: The Documentation Update Auditor

What it's for: Reviewing existing SOPs and documentation to identify what's outdated, missing, inconsistent, or no longer reflects how the work is actually done. **When to use it:** During quarterly documentation reviews, after a process change, or when you suspect your SOPs don't match reality anymore.

Main Version

PROMPT TO COPY

ROLE

You are a documentation quality auditor for the automotive industry. You review SOPs, work instructions, and training materials to identify gaps, outdated information, inconsistencies, and compliance risks. You know the difference between documentation that protects the company and documentation that just collects dust.

CONTEXT

I have an existing SOP or process document that may be outdated. I want to audit it against how the process is actually performed today.

REQUEST

Review the document I provide and produce:

1. ACCURACY AUDIT

- Flag any steps that seem vague, incomplete, or potentially outdated
- Identify missing safety or compliance steps
- Note any steps that reference old equipment, software, or roles that may have changed
- Highlight inconsistencies between different sections

2. GAP ANALYSIS

- What's missing? (decision points, troubleshooting, handoffs, safety notes)
- What should be added based on industry best practices?
- Are there steps where a new person would get stuck?

3. READABILITY CHECK

- Is the language clear enough for the intended audience?
- Are steps actionable ("do this") vs. vague ("ensure quality")?
- Is the document too long, too short, or poorly organized?

4. UPDATE RECOMMENDATIONS

- Prioritized list of changes: Critical / Important / Nice to Have
- Suggested revision for each flagged item
- Questions to ask the process owner to verify accuracy

FORMAT

Present as a table:

| Section | Issue | Severity | Recommendation | Question for SME |

QUESTION

Ask me:

1. When was this document last updated?
2. Has the process changed since then?
3. What's the biggest complaint people have about this SOP?

Then ask me to paste the document.

PROMPT TO COPY**Alternate Version (Copilot Free)****PROMPT TO COPY**

Here is an existing SOP that may be outdated:

[PASTE DOCUMENT]

Review it and tell me:

1. What steps seem vague, incomplete, or outdated?
2. What's missing (safety steps, decision points, troubleshooting)?
3. Is the language clear enough for a new employee to follow?
4. What should I update first? (rank by priority: critical / important / nice to have)

For each issue, suggest a specific fix and a question I should ask the process expert to verify.

Prompt #5: The Visual Work Instruction Creator

What it's for: Transforming a text-based SOP into a visual work instruction format — step-by-step with descriptions designed to accompany photos, diagrams, or illustrations at each step. **When to use it:** When your audience learns better from visual instructions than from text. For plant floor or service bay processes where workers need to see what "right" looks like.

Main Version**PROMPT TO COPY****ROLE**

You are a visual work instruction designer for automotive manufacturing and service operations. You convert text-based SOPs into visual, step-by-step instructions designed to be posted at workstations, included in training binders, or displayed on shop floor screens.

CONTEXT

I have a text SOP that needs to become a visual work instruction. The audience is [OPERATORS / TECHNICIANS / NEW HIRES] who respond better to images and short captions than to paragraphs of text.

REQUEST

Using the SOP I provide, create:

PROMPT TO COPY**1. VISUAL WORK INSTRUCTION LAYOUT**

For each step, provide:

- Step number and title (bold, 3–5 words)
- Action description (1–2 sentences maximum)
- What to look for: Acceptance criteria in plain language
- Photo/diagram instruction: Describe exactly what photo or diagram should be taken to illustrate this step (angle, focus point, what to highlight)
- Caution/tip box: Any safety note or common mistake, highlighted visually

2. VISUAL FLOW DIAGRAM

- A text-based flowchart showing the process from start to finish
- Include decision points as diamonds
- Include quality checkpoints as highlighted boxes
- Designed to be recreated as a poster or digital display

3. PHOTO SHOT LIST

- Numbered list of every photo or image needed
- For each: what to photograph, how to frame it, what to annotate
- Include "good vs. bad" comparison shots where relevant

FORMAT

- Maximum 10 words per caption
- One action per step (never combine two actions)
- Use color coding suggestions: green for "go/correct," red for "stop/wrong," yellow for "caution"
- Design for A3 or tabloid-size printing

QUESTION

Ask me to paste the SOP and tell you about the work environment (lighting, space constraints, what's around the workstation).

Alternate Version (Copilot Free)**PROMPT TO COPY**

Here is a text SOP:

[PASTE SOP]

Convert it into a visual work instruction:

1. For each step: a 3-5 word title, 1-2 sentence action, what to look for, and what photo should be taken
2. A text-based flowchart of the full process
3. A photo shot list describing each image needed

PROMPT TO COPY

Keep captions under 10 words. One action per step. Use simple language for plant floor or service bay workers.

Quality Check - Before Using AI-Generated Documentation

- **[] Has a subject matter expert reviewed it?** AI generates a strong first draft. Only someone who does the work can confirm it's accurate and safe.
- **[] Would a new person be able to follow this?** Have someone unfamiliar with the process read it. Where they get confused is where the documentation needs more detail.
- **[] Are safety and compliance steps clearly marked?** Every safety-critical step should be bold, highlighted, or called out. Never bury safety in a paragraph.
- **[] Does it match how the work is actually done?** SOPs that describe the "official" process instead of the real one get ignored. Document reality, then improve it.
- **[] Is it short enough to actually use?** If no one will read a 15-page SOP, create a one-page checklist and keep the full version as backup.

Copilot Basics (If You Use Microsoft 365)

- **Work Mode vs. Web Mode:** Work mode searches your company's Microsoft 365 data (emails, files, Teams). Web mode uses the open internet. For documentation, Work mode can pull existing SOPs, process emails, and training files from your SharePoint. For the prompts in this playbook, Web mode works well since you're pasting your own notes.
- **When to use each:** Use Work mode when you want AI to reference existing documentation in your company's systems. Use Web mode when you're creating new SOPs from scratch using your bullet points.
- **How to save prompts:** Copy any prompt from this playbook into a Word document, OneNote, or Notion page. Label each one so you can find it fast when documentation is needed.
- **Reminder:** Always follow your company's AI usage policy. Don't paste confidential process information into external AI tools without checking what's allowed.

What to Try This Week

- **[] Pick one undocumented process.** The one that only one person knows. The one that scares you when they take vacation.

- [] **Run Prompt #1 or #3.** Either paste your rough notes (Prompt #1) or sit with the expert and let AI interview them (Prompt #3). Get it captured.
- [] **Create a one-page checklist.** Even if you don't build the full SOP yet, get the critical steps onto one printable page.
- [] **Test it with a new person.** Hand the checklist to someone who hasn't done the process. Watch where they get stuck. That's where your documentation needs work.
- [] **Set a 90-day review reminder.** Documentation that isn't reviewed becomes documentation that isn't trusted. Put it on the calendar.

Resources & Next Steps

Key Frameworks from This Lab

- **Tribal knowledge is organizational risk.** If a process lives in one person's head, it's one resignation away from gone. Capturing it is a leadership responsibility, not an admin task.
- **The Knowledge Capture Spectrum** shows you where your documentation stands - from tribal knowledge (critical risk) to living documentation (maintained and trusted).
- **AI cuts the creation time, not the review time.** A draft SOP in 10 minutes is worthless if no one verifies it. The value of AI is freeing you to focus on accuracy instead of formatting.
- **Good documentation is tested, not written.** If a new person can't follow it, the document isn't done - no matter how polished it looks.

What We Didn't Cover (Yet)

- Building a document management system to organize and version-control your SOPs.
- Using AI to automatically flag when SOPs may be outdated based on process changes.
- Creating video-based work instructions with AI-generated narration and captions.
- Connecting SOPs to your quality management system (QMS) for audit readiness.

Next Steps

- Document one critical process this week using Prompt #1 or #3. Start with the one that keeps you up at night.
- Convert one existing SOP into training materials using Prompt #2. Test it with a new hire.
- Audit your three most-used SOPs with Prompt #4. Fix the critical gaps first.

The Mental Model - Capture, Structure, Train

****Today's session was built on one idea: **documentation shouldn't take longer than the process it describes. AI makes it possible to capture knowledge in minutes, structure it in a format people can follow, and build training materials that actually work.**

Step	Prompt	What It Does
Capture	Prompt 1 — The SOP Generator	Takes rough notes or bullet points and builds a complete SOP with checklist and rationale.
Extract	Prompt 3 — The Process Capture Interview	AI interviews you (or your expert) to pull undocumented knowledge out step by step.
Train	Prompt 2 — The Training Material Builder	Converts any SOP into a training guide, cheat sheet, and knowledge check for new hires.

The process was never the hard part. Getting it out of someone's head and onto paper was. Now you can do it in one sitting.

Your knowledge is an asset - but only if it's captured:

- Pick the one process that scares you most.
- Document it this week.
- You now have the tools to turn tribal knowledge into organizational knowledge in minutes instead of months.

Related resources

Keep working with the material.

The prompts and exercises are included above. Save a useful prompt and return to it with your next task.

Links and resources

These links are clickable in the PDF. For a paper copy, use the numbered references below.

[1] <https://vimeo.com/1172251827/69b49d59de?share=copy&fl=sv&fe=ci>