SOPs and Training Materials in Half the Time

October 20, 2026 | Operations + Work Systems

Capture the knowledge your team relies on, turn rough notes into usable SOPs, and build training materials people can follow.

Capture. Structure. Train.

October 20, 2026
12–1 PM Eastern · 60 minutes
With Cheryl Thompson

Who it is for
People documenting work and training others in manufacturing, service, dealerships, and office teams.

Bring
One process, approved notes or an SOP, and access to your organization's approved AI tool.

Open the online playbook

The recorded session

Watch the Learning Lab.

Follow the October 20 session, then use the prompts and examples with your own process.

The visual work instruction demo from Prompt 5 wasn't finished during the session. The PDF below shares the work in progress.

Watch replay on Vimeo ↗ [1]

Unfinished demo from Prompt 5: Visual Work Instruction (PDF, 8 pages) [2]

0–5 minutes · Get ready

Choose the process someone always has to explain.

Your most experienced person takes a week off. A routine task stalls because everyone knows who to ask, but nobody can find the steps. The notes that do exist leave out the decisions that make the work go smoothly.

Bring that process into this lab. You'll use three core prompts to create an SOP, capture an expert's knowledge, and build training materials. Two additional prompts help you create visual instructions and keep the documentation current.

Open your approved AI tool in another tab

Microsoft Copilot ↗ [3]

ChatGPT ↗ [4]

Claude ↗ [5]

Gemini ↗ [6]

1. **Choose one prompt version.** Use the full prompt for the exercise. If you're using the free version of Copilot, choose the shorter prompt to fit its character limit. Start a fresh chat when you change to an unrelated process.
2. **Give it the context.** Answer its questions, then paste your notes, source document, or a practice example. The interview prompt continues asking about the work before it creates the final draft.
3. **Review the draft.** Check it against the source and the actual process. Ask AI to flag missing facts; a confident sentence is not evidence that a requirement is correct.

If AI drafts too soon: ask it to pause, collect the missing context, and use only the information you provide. Answer in a paragraph if that is easier. You do not need to fill out a perfect form.

Use approved information. Follow your organization's AI policy. Remove confidential customer, employee, and process information before using an external tool. The examples here give you a way to practice without uploading company files.

Our 60-minute path

1. 0–5 min Choose one process [7]
2. 5–12 min Use the documentation framework [8]
3. 12–24 min Prompt 1 · Structure rough notes [9]
4. 24–34 min Prompt 2 · Build training materials [10]
5. 34–44 min Prompt 3 · Capture the expert's knowledge [11]
6. 44–47 min Prompt 4 · Audit an old SOP [12]
7. 47–53 min Prompt 5 · Create visual instructions [13]
8. 53–56 min Make it reusable [14]
9. 56–60 min Choose your next step + questions [15]

5–12 minutes · The framework

Start where the knowledge is today.

The work may be familiar to your expert and still be difficult for the next person to follow. Find the state of your documentation, then choose the prompt that moves it forward.

Tribal knowledge

One person carries the steps and judgment. Start with Prompt 3, the Process Capture Interview [11], before that knowledge becomes unavailable.

Rough notes

You have bullet points or an explanation, but the sequence and checks are incomplete. Use Prompt 1, the SOP Generator [9], to structure a draft.

Outdated SOP

A document exists, but the work has changed. Give Prompt 4, the Documentation Update Auditor [12], both the old document and the known changes.

Current SOP, no training

The steps are documented, but learning still depends on whoever is available. Use Prompt 2, the Training Material Builder [10], to plan practice and verification.

Living documentation

The SOP, checklist, and training materials agree. Keep a named owner, a review date, and a way for people doing the work to report changes.

Capture → Structure → Train

Capture the expert's steps and decision points with Prompt 3. **Structure** the notes into a reviewable SOP with Prompt 1. **Train** from the approved procedure with Prompt 2. In the live session, we start with existing notes so you can see the finished draft first.

Give each document a job.

- **SOP:** the detailed, controlled procedure and reference for the task.
- **Quick-reference checklist:** the critical reminders for someone trained to do the work.
- **Training guide:** the explanation, demonstration, practice, and verification for a learner.
- **Visual work instruction:** the action and the correct result shown with photos and short captions.

Four ingredients of a strong AI setup

Role

Tell AI what kind of help you need, such as an operations documentation specialist.

Context

Give it the process, environment, audience, source notes, and approved requirements.

Voice

Use the language the people doing the work understand. Ask for clear actions and familiar terminology.

Guardrails

Identify what it must not invent. Require a visible flag for missing settings, limits, requirements, and approvals.

The prompt structure is Role, Context, Request, Question. Role sets the expertise. Context explains the situation. Request names the deliverables. Question gathers the missing information before drafting.

AI cuts the creation time. Your review makes the draft usable.

Keep the subject matter expert involved. A technique described in rough notes still needs review before it becomes an instruction or a training requirement.

The AI Efficiency Ladder

1. **On-the-fly prompting:** explain the task from scratch each time.
2. **Repeatable prompts:** save an instruction you can reuse with new process notes.
3. **Saved context:** keep your approved template, terminology, and instructions together in a supported workspace.
4. **Automation and agents:** connect repeatable work to a review process, with access and approval controls.

For this lab, start with a repeatable prompt. If you already use saved context, the Make it reusable [14] section shows what to keep with it.

Prompt 1 · Structure · 12–24 minutes

Turn rough notes into a usable draft.

Use the SOP Generator when the process is scattered across bullet points, an old email, or a whiteboard. Give it the notes you have, the people doing the work, and the requirements they must follow.

You'll build: A draft SOP, a one-page checklist, and a plain-language explanation of why the process matters.

Full prompt

The SOP Generator

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

PROMPT TO COPY

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
- 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.

Shorter prompt · Copilot Free

Replace the bracketed inputs with your own approved context or the practice example. Keep the process details together in the same chat.

The SOP Generator · shorter version

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

PROMPT TO COPY

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

Need an example? Try this practice scenario.

Fictional material for practicing documentation. Copy the full prompt first; when AI asks for context, paste an example below. These examples are not instructions for operating equipment.

Example: manufacturing changeover notes

EXAMPLE TO COPY

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: dealership vehicle handoff

EXAMPLE TO COPY

New vehicle delivery for Meadowridge Motors, a fictional automaker. Meadowridge Connect is its fictional owner app. 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 using wireless pairing and the vehicle's phone integration system. Show them how to use the Meadowridge Connect 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:

EXAMPLE TO COPY

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 Meadowridge Connect. 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 pair their phone. Also: always check the gas tank. Nothing kills the moment like delivering a car with a quarter tank.

Example: receiving inspection

EXAMPLE TO COPY

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.

The three practice examples below are the manufacturing, dealership, and receiving scenarios from the source playbook. They include informal practices for you to question during review. They are not approved work instructions.

Your turn. Choose one step in the draft. Check the action, the acceptance criterion, and the decision if something is wrong. Flag anything the source notes did not establish. Then check whether the checklist keeps the same critical steps.

Prompt 2 · Train · 24–34 minutes

Help a new person learn the work.

Use the Training Material Builder to turn a process document into a trainer's walkthrough. Each step moves through explain, demonstrate, practice, and verify, so the learner gets more than a document to read.

You'll build: With the full prompt: a training guide, day-one cheat sheet, knowledge check with answers, and a 30-day competency tracker. The shorter prompt produces the guide, cheat sheet, and knowledge check.

Full prompt

The Training Material Builder

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
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

PROMPT TO COPY

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

Shorter prompt · Copilot Free

Replace the bracketed inputs with your own approved context or the practice example. Keep the process details together in the same chat.

The Training Material Builder · shorter version

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...?")

PROMPT TO COPY

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

Need an example? Try this practice scenario.

Fictional material for practicing documentation. Copy the full prompt first; when AI asks for context, paste an example below. These examples are not instructions for operating equipment.

Example: training three new press operators

EXAMPLE TO COPY

The process: die changeover on our 600-ton progressive press line. The process notes cover a two-person changeover, lockout tagout, crane work, torque pattern, shut height setting, and 5 first-off parts with quality sign-off. These notes are a fictional training exercise, not an approved operating procedure.
The audience: three new press operators hired in the last month. All three have manufacturing experience but none on progressive dies. One is a former CNC operator, strong mechanically. Two of the three would rather watch than read.
How training happens today: shadowing. New operators follow our lead setup man for two weeks and pick up whatever they pick up. Nothing structured, no sign-offs, and when he is on vacation, training just stops.
The biggest mistake new people make: skipping the brass-hammer seat when setting shut height, because the press runs fine for the first 50 hits and then drifts into scrap.
Second most common: bolting the die down sequentially instead of corner-to-corner in the torque pattern, because sequential feels natural.
The deadline that matters: our lead setup man retires at the end of next month. These three need to be trained and signed off before he leaves. For this practice run, build a draft training package from the notes below. Label it DRAFT FOR SME REVIEW. Do not invent machine settings, acceptance limits, safety procedures, or qualification criteria. Mark missing information [NEEDS INPUT]. Treat the brass-hammer technique as an unverified practice requiring engineering and safety review, not as an instruction to teach.

PROCESS NOTES
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

EXAMPLE TO COPY

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

For your own work, paste the current, approved SOP. The fictional practice pack includes the source changeover notes and asks for a draft pending SME review, so the exercise can run without a missing attachment.

Your turn. Read one scenario question and its answer. Can you trace the answer to the source? Choose one skill a trainer should observe in practice before signing off. A correct quiz answer alone does not establish competence.

Prompt 3 · Capture · 34–44 minutes

Get the knowledge out of someone's head.

Use the Process Capture Interview when an experienced person can do the job but the explanation stops at "you just know." AI asks for the steps, the warning signs, the decisions, and what they check before handing the work over.

You'll build: A draft SOP after the interview, a verification list, and the practical knowledge that usually stays with the expert.

Full prompt

The Process Capture Interview

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

PROMPT TO COPY

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

Shorter prompt · Copilot Free

Replace the bracketed inputs with your own approved context or the practice example. Keep the process details together in the same chat.

The Process Capture Interview · shorter version

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.

Need an example? Try this practice scenario.

Fictional material for practicing documentation. Copy the full prompt first; when AI asks for context, paste an example below. These examples are not instructions for operating equipment.

Example: the retiring die setter

EXAMPLE TO COPY

The process we are documenting today: shut height setting and first-off approval on our 600-ton progressive press. It matters because our lead die setter, 31 years on this press, retires at the end of next month, and he is the only person who gets it right the first time. Everyone else averages two or three scrap runs before dialing it in.
It happens at every die change, two to four times a week. The official procedure says "set shut height per die spec card," which is one line standing in for something that takes him 20 minutes and involves feel, sound, and a brass hammer.
I have him with me for the next hour and he is willing to talk. He is patient but hates paperwork, so keep the questions conversational. When he says things like "you can hear when it seats," push for what he is actually listening for, and when he says "you just know," ask what he checks that tells him he knows.

EXAMPLE TO COPY

The example starts the interview. It does not answer it for you. Use a real expert's answers or describe your own approved process; do not ask AI to invent the expert's knowledge.

Your turn. Run two or three interview exchanges. When the expert says "it sounds right," ask what they hear and what check confirms it. Review the captured notes before asking for a draft.

Prompt 4 · Keep it current · 44–47 minutes

Find the gaps before the next person does.

Use the Documentation Update Auditor when equipment, roles, software, or the process has changed. Give it both the document and the changes you know about; it cannot determine current practice from an old SOP alone.

You'll build: An audit table with the issue, priority, proposed revision, and a question for the process owner.

Full prompt

The Documentation Update Auditor

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

PROMPT TO COPY

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.

Shorter prompt · Copilot Free

Replace the bracketed inputs with your own approved context or the practice example. Keep the process details together in the same chat.

The Documentation Update Auditor · shorter version

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)

PROMPT TO COPY

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

Need an example? Try this practice scenario.

Fictional material for practicing documentation. Copy the full prompt first; when AI asks for context, paste an example below. These examples are not instructions for operating equipment.

Example: auditing the 2019 changeover SOP

EXAMPLE TO COPY

Our die changeover SOP was last updated in March 2019, revision C. The process has changed since: we replaced the old cab crane with an overhead crane that has different rigging rules, we added QR-coded digital checklists at the workstation, and quality now requires 5 first-off parts instead of 3. The biggest complaint from operators: "the SOP doesn't match what we actually do, so nobody opens it." Our last internal audit noted that operators could not say where the current revision even lives.
Here is the document:
DIE CHANGEOVER PROCEDURE, Rev C, 03/2019
1. Remove remaining material from press.
2. Perform lockout tagout per plant policy.
3. Disconnect utilities. Remove die using cab crane and approved rigging.
4. Clean bolster. Install new die and secure.
5. Reconnect utilities and verify sensors.
6. Set shut height per die spec card. Run 3 first-off parts and obtain quality approval.
7. Resume production.
Revision history: Rev A 2014, Rev B 2016, Rev C 2019.

The example includes the 2019 SOP and a description of later changes. Treat suggested best practices as proposals to verify against your site's current requirements.

Your turn. Pick the highest-priority finding. Separate a confirmed mismatch from a question to investigate. Assign a reviewer and confirm the replacement wording before publishing a revision.

Prompt 5 · Show the work · 47–53 minutes

Make the important steps visible.

Use the Visual Work Instruction Creator with approved photos and the process document. If you have no photos, use the example to build the layout and a shot list for your next observation.

You'll build: A visual instruction layout, a text-based flow diagram, and a shot list showing which images you still need.

Full prompt

The Visual Work Instruction Creator

PROMPT TO COPY

ROLE
You are a visual work instruction designer for automotive manufacturing and service operations. You turn real photos and video of a process into clear, station-ready visual work instructions, and you build the shot list when the photos don't exist yet.

CONTEXT
I will upload photos (or a short video) of the process as it is actually performed, and paste the SOP or my rough notes if they exist. The audience is [OPERATORS / TECHNICIANS / NEW HIRES] who respond better to images and short captions than to paragraphs of text. If I have no photos yet, build the layout from my SOP and give me the shot list so I can capture them.

REQUEST
1. STEP EXTRACTION
From my photos or video and my notes, identify the steps in order. Flag:
- [NEEDS INPUT] for anything visible that you cannot confidently interpret
- [MISSING PHOTO] for any step in my notes that no photo shows

2. 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
- Image: which uploaded photo to use (by number or timestamp) and what to crop, annotate, or highlight. If no photo fits, mark [MISSING PHOTO].
- Caution/tip box: any safety note or common mistake, highlighted visually

3. 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

PROMPT TO COPY

4. GAP SHOT LIST
- For every [MISSING PHOTO]: what to photograph, how to frame it, what to annotate
- Include "good vs. bad" comparison shots where a wrong condition is easy to show

ACCURACY
Describe only what is visible in my photos or stated in my notes. Never invent torque values, spec limits, part numbers, or safety requirements. Flag them as [NEEDS INPUT] instead.

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
Before building anything, ask me ALL of these at once in a single numbered list, then wait:
1. What's the process, and where does it happen? (press line, service bay, dock)
2. Who's the audience, and where will this be displayed?
3. What safety requirements must stand out?
4. Upload your photos or video now, and paste the SOP or notes if you have them. (Phone photos are fine.)
Accept my answers even if I write them as a paragraph or out of order. Do not re-ask. Proceed with whatever I give you, note any assumptions, and use [NEEDS INPUT] or [MISSING PHOTO] for the gaps.

Shorter prompt · Copilot Free

Replace the bracketed inputs with your own approved context or the practice example. Keep the process details together in the same chat.

The Visual Work Instruction Creator · shorter version

PROMPT TO COPY

I am building a visual work instruction for [PROCESS] in my [plant floor / service bay].
I have: [UPLOADING PHOTOS / A SHORT VIDEO / NO PHOTOS YET, SOP PASTED BELOW]

STOP. If the bracketed details above are empty or vague, ask me for them in one numbered list and wait. Accept narrative answers. Do not re-ask. Proceed even if some details are unclear and note any assumptions.

Create:

PROMPT TO COPY

1. The steps in order from my photos or SOP. Flag anything unclear as [NEEDS INPUT] and any step without a photo as [MISSING PHOTO]
2. For each step: a 3-5 word title, a 1-2 sentence action, what to look for, and which photo to use with what to highlight
3. A text-based flowchart of the full process
4. A shot list for every missing photo (what to shoot, the angle, what to annotate)

Never invent torque values, specs, or safety rules; flag them instead. Keep captions under 10 words. One action per step. Simple language for plant floor or service bay workers.

[PASTE SOP OR NOTES IF YOU HAVE THEM]

Need an example? Try this practice scenario.

Fictional material for practicing documentation. Copy the full prompt first; when AI asks for context, paste an example below. These examples are not instructions for operating equipment.

Example: visual layout before Saturday's changeover

EXAMPLE TO COPY

I am building a visual work instruction for die changeover on our 600-ton progressive press. I cannot photograph it until Saturday, which is our next scheduled die change. The audience is press operators and new hires on second shift, and the finished instruction will hang laminated at the press and rotate on the shop floor screen.
What I have today is the current SOP summary: run off or remove the remaining coil, lockout tagout, disconnect air lines and sensors, unhook the die from the bolster, crane the die out with a rated spreader bar, clean the bolster surface, crane in and center the new die on the locating pins, bolt down corner-to-corner in the torque pattern, reconnect air and sensors, jog one dry cycle, set shut height with the brass-hammer seat, verify feed progression, run 5 first-off parts, get quality sign-off.
Safety notes that must stand out: lockout tagout before any physical work, never walk under the suspended die, pinch points at the bolster edge.
Build the visual layout and the flow diagram now, and give me the complete shot list with angles and annotations so second shift can take the photos during Saturday's changeover. Flag every step where a good-versus-bad comparison photo would help.

Upload support varies by tool and account. Use photos or video only if your approved tool supports the format. The no-photo example works with pasted notes.

Unfinished demo from Prompt 5: Visual Work Instruction

This demo wasn't finished during the session. The eight-page PDF shares the work in progress, including a process flow and photo capture guide.

Draft / not approved. Includes photo placeholders and items requiring review. Do not use as an operating procedure.

Unfinished demo from Prompt 5: Visual Work Instruction (PDF, 8 pages) [2]

Your turn. Check one proposed caption and its assigned photo. Does the image actually show the action and the correct result? Keep missing-photo flags visible. A polished layout does not confirm an unseen step.

53–56 minutes · Keep the setup

Teach the SOP Generator your format once.

The notes change from process to process. Your document structure, terminology, and review requirements often stay the same. Save those together so the next draft starts with the right context.

1. **Gather the approved references.** Use your SOP template, numbering convention, site terminology, and current safety and quality references.
2. **Save the instructions and references.** Use a supported project, saved assistant, or other approved workspace. Name it so you can find it, such as "SOP Generator · Plant 4."
3. **Use Prompt 1 as the starting instructions.** Keep the template and references current, and state which process notes belong to the new task.
4. **Test a second process.** Check that the format carries over while the facts come only from the new source. Review and approve every draft before release.

If saved assistants are unavailable in your account, keep the prompt and approved template in an accessible folder and paste them into a new chat. Tool features and file limits vary by plan and organization.

For a different repeatable task, use the Prompt Builder from the October 6 playbook [16]. It helps you write an instruction you can save and use again.

Before you use the output

Review the work, then release the document.

- **Verify every technical requirement.** Confirm settings, limits, materials, and acceptance criteria against approved sources. An AI draft cannot authorize a machine setting or a workaround.

- **Resolve unsafe or conflicting practices.** The press examples include a brass-hammer technique reported in rough notes. Treat it as an unverified practice for engineering and safety review. Do not promote it into a required step because AI repeats it.
- **Keep the versions consistent.** The SOP, checklist, visual instruction, training guide, and answer key must agree on sequence, roles, and release criteria.
- **Test comprehension safely.** Ask a learner to explain the steps and point out gaps. Any practical demonstration follows the approved training process with qualified supervision.
- **Control the release.** Confirm the owner, revision, approval, and next review date. Replace outdated copies so the current version is the one people find.

56–60 minutes · Put it into practice

Document one process this week.

1. **Choose one process that depends on one person.** Pick a task where someone's absence would slow the work or leave a decision unexplained.
2. **Capture or structure it.** Run Prompt 3 with the expert, or Prompt 1 with approved notes. Keep unresolved questions visible.
3. **Have the process owner review it.** Confirm what is accurate, what needs evidence, and what should change before the document is used.
4. **Build and test one learning aid.** Create a checklist or training guide from the reviewed procedure. Ask a learner where the explanation is unclear.
5. **Set the next review.** Use your site's required cadence, or propose a 90-day review to the document owner. Revisit it when the process changes.

What we did not cover

- Building a complete document management system and its approval workflow.
- Connecting controlled SOPs to a quality management system.
- Producing finished training videos with narration and captions.
- Automating document reviews across a repository with appropriate access controls.

The useful knowledge is already in your team. Start with one process and give the next person a clearer way to learn it. A draft you can review together is a practical place to begin.

Questions or feedback? cheryl@cherylthompson.net [17]

Links and resources

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

[1] https://vimeo.com/1237704760/7e45c2ce86?fl=ip&fe=ec&share=copy

[2] https://www.cherylthompson.net/learning-library-files/Die_Changeover_Complete_Visual_Instruction_Package_DRAFT.pdf

[3] https://copilot.microsoft.com/

[4] https://chatgpt.com/

[5] https://claude.ai/

[6] https://gemini.google.com/

[7] https://www.cherylthompson.net/learning-labs/2026-10-20-sops-and-training-materials-in-half-the-time#start

[8] https://www.cherylthompson.net/learning-labs/2026-10-20-sops-and-training-materials-in-half-the-time#framework

[9] https://www.cherylthompson.net/learning-labs/2026-10-20-sops-and-training-materials-in-half-the-time#structure

[10] https://www.cherylthompson.net/learning-labs/2026-10-20-sops-and-training-materials-in-half-the-time#train

[11] https://www.cherylthompson.net/learning-labs/2026-10-20-sops-and-training-materials-in-half-the-time#capture

[12] https://www.cherylthompson.net/learning-labs/2026-10-20-sops-and-training-materials-in-half-the-time#audit

[13] https://www.cherylthompson.net/learning-labs/2026-10-20-sops-and-training-materials-in-half-the-time#visual

[14] https://www.cherylthompson.net/learning-labs/2026-10-20-sops-and-training-materials-in-half-the-time#make-reusable

[15] https://www.cherylthompson.net/learning-labs/2026-10-20-sops-and-training-materials-in-half-the-time#next-step

[16] https://www.cherylthompson.net/learning-labs/2026-10-06-change-management-get-your-team-to-adopt-new-tools#prompt-builder

[17] mailto:cheryl@cherylthompson.net