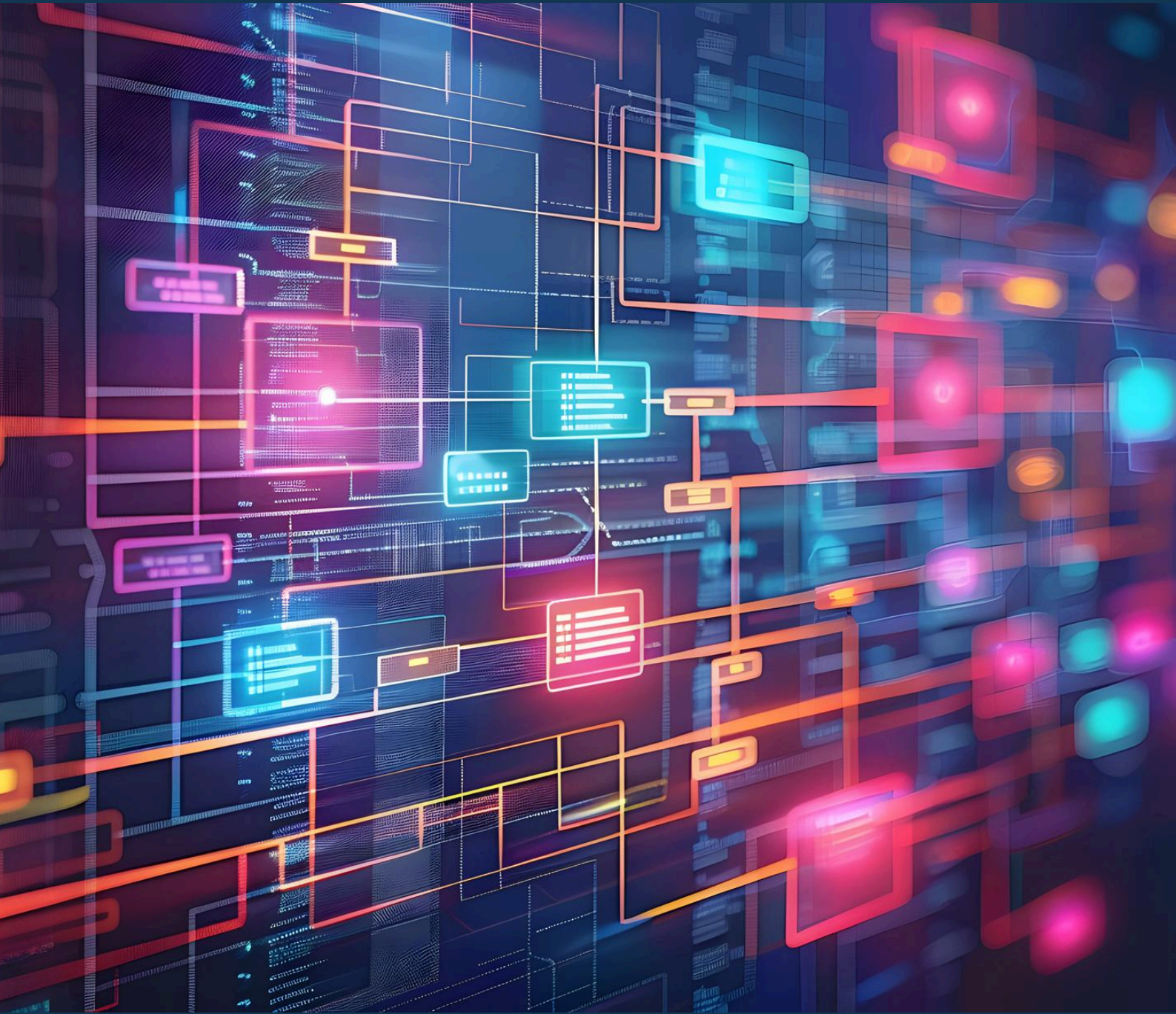


# Halderstone



Training module

# Process Design

Design, document & maintain usable processes with clear boundaries, flows, handovers, controls & evidence



# Are your documented processes failing to translate into consistent, reliable operations?

## Overview

Many organizations possess documented processes, yet operational work often relies on informal coordination, exceptions, and undocumented variations, leading to inconsistent outcomes, unclear responsibilities, and control gaps.

This training module offers a structured methodology for designing processes that are clear, executable, and sustainable. Participants will learn to define precise process boundaries, map flows and handovers effectively, and embed controls and necessary evidence directly into documented process design, ensuring documentation supports operations without creating undue bureaucracy.



## Target audience

- Management system implementers and coordinators
- Executives and department heads accountable for management system performance
- Those responsible for processes, policies, assets, risks, and controls related to a management system
- Auditors seeking insights into management-side best practice (not audit technique)
- Management consultants working with management system design, governance, or improvement

# Is this module for you?

## It is a good fit for you if you...

- are responsible for defining or improving operational processes.
- rely on assumptions or informal knowledge instead of clear processes.
- struggle with handovers, inconsistent execution, or process gaps.
- need process design that supports accountability, control, and audits.
- want documented processes people can actually use and maintain.

## It may be less suitable for you if you...

- already operate clear, consistently applied, and regularly reviewed processes.
- have no mandate or interest in shaping process design.
- are only looking for tool-specific modelling training.
- expect end-to-end process redesign rather than foundations.

# Learning outcomes



## Key outcomes

- Design clear, runnable end-to-end processes with explicit boundaries, handovers, and ownership
- Embed controls and required evidence directly into process steps without creating unnecessary bureaucracy
- Establish practical process ownership and lightweight governance so documented processes remain usable and up to date over time

## Additional capabilities

- Define clear process boundaries, including triggers, inputs and outputs, interfaces, and ownership
- Create fit-for-purpose process maps that emphasise handovers and decisions
- Specify roles and responsibilities in the process flow so accountability is operationally clear
- Decide the appropriate level of process documentation for usability and repeatability
- Manage process variants deliberately
- Set up lightweight change control so documentation stays aligned with operational reality

# Agenda

## **Process design in management systems**

How process design connects strategy, day-to-day operations, controls, and accountability across the organisation, and why weak design and weak documentation create gaps that only surface during incidents or audits

## **Defining processes with clear boundaries**

How to clarify scope, triggers, inputs and outputs, interfaces, and ownership so responsibilities are unambiguous and overlaps or blind spots are avoided

## **Mapping flows, roles, and handovers**

How to design end-to-end process flows that make responsibilities, decisions, dependencies, and handovers explicit and operationally clear

## **Embedding control and evidence into the process**

How to integrate controls and required evidence directly into documented process steps, instead of layering documentation and checks on top of operational work

## **Designing for usability**

How to design processes that are practical, understandable, and workable for the people who actually run them ? not just theoretically correct

## **Keeping processes aligned with tools and systems**

How to align process design with IT systems, forms, and tools so execution reflects documented reality rather than workarounds

## **Process ownership, governance, and change control**

How to establish clear ownership and lightweight governance so documented processes stay current, effective, and aligned with how the organisation actually operates

## **Case-based workshop**

Applying the learned concepts, methods, and approaches in a realistic case setting

# Included materials



## Learning materials

- Slide deck
- Participant workbook

## Templates & tools

- Process design and maintenance process including key role definitions
- Process definition template
- Control & evidence mapping sheet
- Process change impact checklist
- Process review and update log
- AI prompt collection for process management

## Confirmation

- Confirmation of participation

# Preparation guidance



## Assumed background

This module assumes general familiarity with management system concepts and how operational work is organised in teams and functions. No clause-level knowledge is required.

Helpful background includes:

- Understanding of organisational roles, responsibilities, and handovers
- Familiarity with basic documented information concepts (procedures, records, versioning)

## Preparatory modules

### Foundation (depending on background)

Useful if you are new to the underlying concepts

- Governance Design

### Supporting (optional)

Helpful but not required to participate effectively

- Documentation & Knowledge Management

# Logistics



## Available languages

- English
- German

## Standard delivery options

- Virtual live teaching
- Blended learning (e-learning + live)

## Bespoke delivery options

- On-site delivery at your place
- Content adapted to your organization



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