

Work Instruction

[The task as a verb phrase, for example: Escalate a customer bug report to engineering]

WI number	[e.g. WI-SUP-012]	Version	[1.0]
Team	[Team or function]	Related SOP	[SOP number or name, if any]
Owner	[Role, then name]	Effective date	[YYYY-MM-DD]
Status	[Draft / Approved / Retired]	Next review	[YYYY-MM-DD]

1. Task and result

Name one task as a verb phrase, and the result someone could check when it is done. If you cannot name a visible result, the task is probably part of a bigger one.

- **Task:** [verb phrase]
- **Result:** [what exists or has changed when the task is done]
- **Starts when:** [the trigger, for example: a ticket is assigned to you]

2. Who does this

The role that performs the task and the training or permission it needs. Write for a qualified person doing the task for the first time.

- **Performed by:** [role]
- **Needs:** [training, permission or access level]
- **Ask for help:** [role or channel]

3. Before you start

Everything that must be true or ready before step 1: systems and the access they need, tools, materials, files, and the state the work should be in.

- [System or tool, and the access it needs]
- [Material, file or form, and where to find it]
- [Condition that must be true, for example: the order is marked Paid]

4. Safety and warnings

Warnings that apply to the whole task. Repeat each one in the step where it matters, before the action, not after it. Delete this section if there are none.

- [Warning, and why it matters]
- [...]

5. Steps

One action per row, starting with a verb. Name buttons, fields and parts exactly as they appear. Key point says how or why; Check says what the person should see when the step worked. Paste a cropped screenshot or photo under any action where the control or part is hard to find.

Step	Action	Key point	Check
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

6. If something goes wrong

Write each problem as what the person would see, then what to do. Say when to stop and who to contact, so nobody has to improvise.

If you see	Do this	Contact

7. Done when

The final check, the record to keep and who receives the work next. A person should be able to tell, without asking anyone, that the task is finished.

- **Final check:** [what to confirm before you stop]
- **Record:** [what to save or update, and where]
- **Hand off to:** [the next role or queue, if any]

8. Revision history

Add a row whenever a step, a screen or a rule changes. Say why, so nobody later deletes a step that looks unnecessary.

Version	Date	What changed	Changed by
1.0	[YYYY-MM-DD]	First version	[Role]

Free work instruction template from stepvideo.io/blog/work-instruction-template. Copy it, change it and use it however you like.