

3-STEP PROCESS DOCUMENTER

Early Education Business Consultants Handout



1

IDENTIFY

These are the core processes that keep your child care center running efficiently.

- Identify your handful of core processes.
- Make a list (Human Resource Management, Accounting, Marketing, Curriculum Implementation, Enrollment, Staff Scheduling, Parent communication, Classroom management etc.)
- Give each a name that everyone agrees to use for each process.



2

DOCUMENT

Clearly define and outline each step of the core process to ensure consistency.

- One at a time, record the major steps.
- Keep the steps simple, concise, and easy to follow for all staff members.
- Focus on the 20% of processes that create 80% of the impact (Pareto Principle).
- Each process should be reviewed and approved - we must agree that this is the right way to do it every time!
- Use the list from Step 1 as the Table of Contents



3

PACKAGE

Ensure the process is accessible, and package it in a way that makes it easy to train and implement.

- Create a standardized format that everyone can follow (e.g., a handbook, digital guide, or toolkit).
- Ensure the process documents are easily accessible for all staff, whether on paper or digitally.
- Use flowcharts, checklists, or templates to visually organize the steps for better understanding.

