

Procedure Review

Procedure _____

Documentation. Gather copies of the documents related to this procedure, list them below, and check each one off as you read it.

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- _____
- _____
- _____
- _____
- _____

Interviews. Interview one or more individuals who work with clients to perform this procedure. Attach notes as needed.

Date	Name
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_____	_____
_____	_____
_____	_____
_____	_____

Observations. Observe one or more appointments with clients to see a real example of this procedure. Attach notes as needed.

Date	Name
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_____	_____
_____	_____
_____	_____
_____	_____

Continued

Conclusions. Record your thoughts and conclusions regarding this <procedure>. What are the strengths of this procedure, and where are the opportunities to improve this part of the new home process in your company? Attach your notes below or following this page.
