

Policy to action map

Quick start and fictional worked example

Turn one policy sentence into a named action, a record and a way to check it.

1. Choose one policy sentence people struggle to carry out.
2. Name the action, trigger, owner and record.
3. Walk through a fictional case and identify gaps.

A useful finish: A colleague can tell what to do, when to do it, and what record to leave.

FICTIONAL EXAMPLE / Adapt the process, not the facts.

Policy statement and source	Fictional policy P-4: a new supplier must be reviewed before onboarding.
Action in ordinary language	Collect the supplier details, complete the review and record the outcome before access is granted.
Trigger and action owner	A new supplier request starts the process. The supplier coordinator owns the action.
Record of completion	Completed review record linked to the supplier entry and the decision date.
Who checks and how	Team lead checks the review record before authorizing onboarding.
Exceptions and follow-up	Unclear cases go to the policy owner. Record the question and pause the affected step until resolved.

Policy to action map

Your worksheet / Start here

Type into the boxes or print these two pages. Save a copy and reopen it to check your entries. For longer notes, use the text template or browser tool.

1. Policy statement and source

Quote or reference one approved policy statement.

2. Action in ordinary language

Describe something a person can actually do.

3. Trigger and action owner

When must it happen, and which role does it?

Policy to action map

Your worksheet / Continue and review

Type into the boxes or print these two pages. Save a copy and reopen it to check your entries. For longer notes, use the text template or browser tool.

4. Record of completion

What shows the action happened?

5. Who checks and how

Name a reviewer and a practical check.

6. Exceptions and follow-up

Record where uncertainty or exceptions go; do not invent permission.

Before you finish: A colleague can tell what to do, when to do it, and what record to leave.

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