

Worksheet

The Edge Team Training
Module 9 – Session 1

Creating Useful Playbooks

Capturing, Using, and Enhancing Operating Procedure.

EXERCISE 1.

List 3 playbooks you could create: (e.g. How to create a quote for a customer)

Playbook 1:

Playbook 2:

Playbook 3:

Pick ONE that you would like to create this week.

EXERCISE 2.

List the four steps for the Playbook from Exercise 1 above:

1. **Camera:** Which method will you use to capture the video?

2. **Course:** Which Steps do you need to cover? (Do not be too detailed, remember you are assuming an intelligent person on the other end)

3. **Cadence:** How often does this playbook need to be used?

4. **Checklist:** Which items need to be on the checklist to be sure it was correctly done?
