

C.A.S.E. → SOP Update Flow



Goal: Turn each C.A.S.E. Method meeting into a permanent improvement to the process.



Step 1 – Run the C.A.S.E. Method Meeting

- Use the **C.A.S.E. Meeting Worksheet** to capture:
 - **C:** Challenges the delegate faced
 - **A:** Steps they took (what they did)
 - **S:** Why they made those decisions (decision-making process)
 - **E:** Parts that were easier than expected (strengths)
 - Focus on uncovering:
 - New ways of doing the task
 - Decision points that need clarity
 - Gaps in knowledge, tools, or training
 - Strengths to keep leveraging
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Step 2 – Review & Identify Updates

After the meeting, highlight:

-  **Improvements to add** (better methods, new tools, smarter steps)
-  **Mistakes to prevent** (clarify decision points, add guardrails)

-  **Knowledge gaps** (link to resources or create quick training)
 -  **Success patterns** (what worked well, why it worked)
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Step 3 – Open the Shared Process Document (SOP)

This is the *living playbook* for the task.

- Location: Google Doc — must be **shared** with both delegate and manager/CEO.
 - Make sure it has:
 - **Version number/date**
 - **Change log** at the top
 - **Sections** for Process Steps, Decision Points, Examples, Knowledge Gaps
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Step 4 – Update the SOP

1. Collaborative update:

- Delegate updates the SOP first (while details are fresh) **Use “Suggesting” mode** for edits so Manager/CEO can review and approve changes before they’re permanent.
- **Use Comments** for adding notes, questions, or feedback without altering the text.
- Manager/CEO reviews and adds notes or refinements.

2. Document changes:

- Add new steps, modify unclear ones, remove outdated ones.

3. Add decision-making context:

- For each critical step, explain *how to decide* and *what factors to weigh*.

4. Insert real examples:

- Show “Successful Example” and “Common Pitfall” from the meeting.

5. Log the update:

- Example: 2025-08-12 – Added source validation rule, clarified quota highlight criteria – Maria
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Step 5 – Share & Confirm

- Notify the delegate that the updated SOP is live.
 - Ask them to confirm they’ve read it before starting the next cycle.
 - Send update to **Accountability Triad** if this task is part of the C.A.S.E. rollout.
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Step 6 – Repeat the Cycle

- At the next C.A.S.E. meeting for this task:
 - Review if the SOP changes improved performance.
 - Add new refinements.
 - Keep evolving it until the task runs smoothly without CEO intervention.
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 **Key Rule:**

If you had a C.A.S.E. meeting but the SOP didn't change, you missed an opportunity.

Every meeting should leave the SOP better than before.