# Operations starter kit

Six practical worksheets for clearer updates, handovers, and follow-up.

## CHOOSE THE WORKSHEET THAT FITS THE TASK

02 **Meeting action items**

03 **Operations brief**

04 **Document version review**

05 **Shift handover**

06 **Weekly operations report**

07 **Policy-change review checklist**

## USE IT IN THREE STEPS

**1. Start with the source.** Gather the relevant notes or versions. State the period, scope, and source date.

**2. Fill only what you know.** Use stated owners and deadlines. Write 'Not specified' for unknown details; keep questions visible.

**3. Review before sharing.** Check the document against the source and confirm responsibilities with the people involved.

## FINAL REVIEW

- ☐ Names, dates, figures, and quotations match the source.
- ☐ Proposals, approved decisions, and open questions are clearly separated.
- ☐ Missing owners, dates, approvals, and dependencies remain visible.

**Online companions:** Free template editors need no sign-in. Actual Clarion tool runs require ChatGPT sign-in and use your existing membership allowance. Review all results. Clarion does not automatically assign tasks, send reminders, or carry out the work.

**Assess the fit:** https://clarionoi.com/value-calculator
Use your own time and cost assumptions; estimates are not guaranteed savings.

**Sharing:** Share this kit unchanged with Clarion attribution. Teams may adapt the worksheets for internal use. Do not resell the unchanged kit or imply Clarion endorsement.

# Meeting action items

Record agreements, owners, deadlines, progress, and updates; prepare the right follow-up for each person.

Use known facts. Write 'Not specified' for unknown details. Add a continuation sheet if needed.

**01 Meeting / date / time zone**

**02 Source / latest update**

**03 Facts and agreed decisions**

**04 Actions, stated owners, and deadlines**

**05 Progress / changes since last version**

**06 Questions to confirm**

**07 Prepared for / included tasks**

**08 Reviewed by / date**

**Prefer to type? Open the matching editable guide using the link below.**

# Operations brief

Bring the current situation, changes, priorities, and open questions together.

Use known facts. Write 'Not specified' for unknown details. Add a continuation sheet if needed.

**01 Subject / period / reader**

**02 Current situation**

**03 What changed**

**04 Priorities and constraints**

**05 Decisions and next steps**

**06 Open questions**

**07 Sources / reviewer**

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# Document version review

Check changed paragraphs and keep a clear record of what still needs confirmation.

Use known facts. Write 'Not specified' for unknown details. Add a continuation sheet if needed.

**01 Document / original version / revised version**

**02 Scope compared**

**03 Source positions and exact changed wording**

**04 Questions and confirmation**

**05 Final checks / reviewer / date**

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# Shift handover

Give the next person current status, open work, and a clear escalation path.

Use known facts. Write 'Not specified' for unknown details. Add a continuation sheet if needed.

**01 Shift / location / outgoing and incoming contacts**

**02 Status at handover / source time**

**03 Open work / owner / next check**

**04 Exceptions and escalation**

**05 Changes since the last handover**

**06 Questions / acknowledgement**

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# Weekly operations report

Explain the week’s results, constraints, and decisions needed for next week.

Use known facts. Write 'Not specified' for unknown details. Add a continuation sheet if needed.

**01 Reporting period / team / prepared for**

**02 Results and source**

**03 Comparison and context**

**04 Blockers and impact**

**05 Decisions needed / decision owner / date**

**06 Next week’s priorities**

**07 Sources / caveats / reviewer**

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# Policy-change review checklist

Record revised wording, approval questions, and communication steps before rollout.

Use known facts. Write 'Not specified' for unknown details. Add a continuation sheet if needed.

**01 Policy / old version / proposed version / scope**

**02 Exact wording changes and source positions**

**03 Questions for the policy owner**

**04 Approval and effective date**

**05 Affected instructions / forms / communication**

**06 Review checks / unresolved issues / reviewer**

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