

Map one workflow before changing it.

A lightweight map for seeing how work starts, moves, slows down and ends. Use fictional or non-sensitive details in this worksheet.

HOW TO USE IT

Choose one recurring workflow. Record the current work, not the ideal future. Mark uncertainty rather than guessing. Finish with one small next step and a named owner.

WORKFLOW NAME

Plain-language name for the work.

BUSINESS OUTCOME

What does “done” make possible?

TRIGGER AND FREQUENCY

What starts it? How often does it happen?

OWNER

Who is accountable for the workflow?

CURRENT STEPS

List 3–6 steps in the order they happen.

SYSTEMS AND INFORMATION

Tools, locations and context that the work needs.

HANDOFFS AND APPROVALS

Where does work move between people or need a decision?

FRICTION AND EXCEPTIONS

Waiting, rework, uncertainty or cases that do not fit.

ONE USEFUL NEXT STEP

A small, testable improvement.

NEXT OWNER AND DATE

Who will take it forward, and when?

A representative map not client evidence.

ILLUSTRATIVE EXAMPLE — FICTIONAL DETAILS ONLY

WORKFLOW	Set up a new employee’s application access.
OUTCOME	The employee can start with the approved systems and a clear owner.
TRIGGER / FREQUENCY	A manager confirms a new starter. Occasional; varies by month.
CURRENT STEPS	Manager emails request → Operations checks the role → IT creates accounts → Manager confirms access → employee starts.
SYSTEMS / INFORMATION	Email, starter checklist, identity provider, application admin consoles.
HANDOFFS / APPROVALS	Manager → Operations → IT → Manager. Manager confirms role and required applications.
FRICTION / EXCEPTIONS	Role details arrive late; application list is incomplete; urgent starters may bypass the normal request.
ONE NEXT STEP	Create one request form with role, manager approval and application list. Operations owns the test by 30 Aug 2026.