



WORKFLOW REVIEW / THE WORK

Map one real process.

Choose a recurring task. Use a recent example with customer details removed.

01 Define the problem

What process are we improving?

A specific task, not a whole department.

Who owns this process?

The person or role responsible for the result.

What should get better?

What business result should improve?

What starts the work?

The event, time, or request that starts it.

02 Map the work

Which tools hold the information?

Name the tools and where the official record lives.

What information is needed?

Fields or documents needed. No real customer data.

What happens, in order?

One step per line. Include the person or tool responsible.

What counts as done?

A result someone can check.

What can go wrong?

Name the exception and who handles it.



WORKFLOW REVIEW / THE PLAN

Choose a useful first change.

Estimate the effort, define a small test, and agree on the next action.

03 Size the effort

Times per month

Use a consistent unit.

Minutes each time, today

Include checking and re-entry.

Minutes after the change

Include human review.

Monthly spending removed (\$)

Only spending that goes away.

New monthly costs (\$)

Tools, usage, upkeep, support.

One-time setup costs (\$)

Build, testing, training.

Recovered time is capacity. It is not automatically a payroll saving. Use estimates; label them.

04 Plan a small test

What is in the first test?

Limit the work. Note access or approvals needed first.

How will we know it worked?

Current baseline, target, and who checks it.

When do we stop or step in?

Failure signal, responsible person, and fallback.

What is the next action?

One action, an owner, and a date.

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