

WORKFLOW MAPPING WORKSHEET

Map one real workflow with the people who perform it. Use a recent job to expose delays, rework and unclear handovers, then choose an improvement you can measure before introducing new systems.

START HERE >>>

1 Set the boundaries

Choose one workflow, such as enquiry to quote, order to delivery or variation to invoice. Define the trigger, completion point, customer and expected output.



2 Walk through a real example

Ask the people doing the work to describe each step. Capture email, spreadsheets, phone calls and workarounds as well as formal systems.



3 Make handovers visible

Record who receives the work, what information they need and how they know it is ready. Include decisions, approval loops and exceptions.



4 Measure the friction

Separate active work time from waiting time. Use timestamps where possible and label estimates. Record repeat entry, missing information and rework.



5 Design and test the improvement

Choose one bottleneck. Agree the new method, owner, baseline and target. Pilot it, review results and update the agreed workflow.



EXAMPLE WORKFLOW - PREPARING A CUSTOMER QUOTE

Step and activity	Role	Input and system	Output and next step	Work / wait
1. Receive enquiry	Administrator	Customer email	Save job details → Step 2	10 min/1 hour
2. Prepare quote	Estimator	Job details; quoting spreadsheet	Draft quote → Step 3	45 min/2 hours
3. Check and approve quote	Business owner	Draft quote; email	Approved → Step 5. Changes needed → Step 4	10 min/1 day
4. Update quote	Estimator	Owner's comments; quoting spreadsheet	Revised quote → return to Step 3	15 min/1 hour
5. Send quote	Administrator	Approved quote; email	Quote sent → Complete	5 min/30 min

Work = time spent doing the task. Wait = time spent waiting before or during that step.

MAP A CURRENT WORKFLOW

Use one row per activity or decision. For a decision, record both outcomes and the next step number. Add rows in Word as needed.

Step and activity	Role	Input and system	Output and next step	Work / wait
1				/
2				/
3				/
4				/
5				/

FIND THE FRICTION

Prompts:

Where does work queue? Who chases missing information?

Where is the same data entered twice? What comes back for correction?

Which approval adds no clear value?

Step	Problem and cause	Impact and evidence

TAKE THE NEXT STEP

SMD Consulting can help map workflows, clarify accountability and develop a practical improvement roadmap.

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This guide is a planning aid and should be adapted to suit your business's operations, needs and objectives.