

Workflow Mapping Sheet.

Map a single process from trigger to outcome. Identify delays and ownership gaps.

Fill this in based on what actually happens, not what should happen.

1. Process Overview

PROCESS NAME

TRIGGER EVENT

FINAL OUTCOME

2. Step-by-Step Flow

#	OWNER	ACTION	NEXT HANDOVER	DELAY / ISSUE
1				
2				
3				
4				
5				
6				
7				
8				

Example: Client Onboarding (Simplified)

Trigger: Signed agreement

1. Sales emails agreement to admin ▪ 2. Admin creates client in CRM ▪ 3. Admin requests documents ▪ 4. Client replies after 3 days ▪ 5. Admin checks docs ▪ 6. Work begins

Thin version (ideal state): Signed agreement → client auto-created → document request sent → work begins

3. Handover Check

Passes through >3 people

Siloed knowledge (key person)

Manual data re-entry

Waiting for external approvals

Process stalls in inboxes

4. Ownership Clarity

OVERALL OWNER

UNCLEAR GAPS

5. Simplified Version

THE "THIN" PROCESS (IDEAL STATE)

If you'd like a second pair of eyes on this,
book a short review session.