

WORKFLOW IMPROVEMENT / FILLABLE TEMPLATE

Workflow Mapping Starter Template

Create a shared picture of one recurring workflow before changing it. Capture what happens today, where work waits and who will take one small improvement forward.

01 Set the boundaries

Choose one workflow with a clear start and finish. Ask the people doing the work to check the map. Mark unknowns rather than guessing, and use fictional or non-sensitive details.

Fill the shaded fields in a PDF reader that supports forms, or print and write. Save a copy, close it and reopen it to check your entries. Keep answers brief; use a separate sheet for more detail. Do not enter passwords or other secrets.

Workflow name

Name the work in plain language, for example new-starter access.

Business outcome and finish point

What does done make possible, and how will you recognise it?

Trigger and frequency

What starts it? How often?

Accountable owner

Who is responsible for the whole workflow?

Current steps in order

List 3-6 steps as they happen now. Include the person or role at each step.

WORKFLOW MAPPING / WORKING RECORD

Trace the handoffs

Continue the same workflow. Record where information, responsibility or approval moves between people and systems.

02 Find where work slows

Systems and information

Which tools, records and context does the work need? Record locations, not confidential contents.

Handoffs and approvals

For each transfer, name the next owner, required information and decision or acceptance point.

Friction and exceptions

Where does work wait, repeat or become unclear? What happens when a case does not fit?

03 Choose one next step

One small change to test

What will you change, and what evidence would show whether it helped?

Next owner

Test timing and review date

Check the change with the people affected. This map records current understanding; it does not approve changes to access, systems or responsibilities.

WORKFLOW MAPPING / FICTIONAL EXAMPLE

A worked workflow map

This example shows the level of detail to aim for. It is an illustrative scenario, not client evidence or a claim of results.

Workflow	Set up a new employee's application access.
Outcome and finish	The employee can start with approved systems. The manager confirms the required access works and the request is closed.
Trigger and owner	A manager confirms a new starter. Frequency varies by month. Operations owns the workflow.
Current steps	1. Manager sends the request. 2. Operations checks the role and approval. 3. IT creates approved accounts. 4. Manager confirms access. 5. Operations closes the request.
Systems and information	Email, starter checklist, identity provider and application admin consoles. The request contains the approved role and required application list.
Handoffs and approvals	Manager to Operations to IT to Manager, then back to Operations to close the request. IT acts only after the approved role and application list are complete.
Friction and exceptions	Role details arrive late, the application list is incomplete, or an urgent starter bypasses the normal request. Operations returns incomplete requests for clarification.
One change to test	Use one request form with the role, manager approval and application list. Operations checks whether fewer requests need clarification.
Owner and review	Operations owns a small test before the next scheduled starter. Agree the review date before the test begins.

Use this page as a model for the level of detail, not as a claim about a real business or process. General information only. This worksheet is not a compliance, privacy or process-certification assessment.

For the next step, explore the [Workflow Handoff Audit Sheet](#)