

Workflow Analysis Worksheet

A guided exercise for mapping a process, identifying bottlenecks, and assigning improvements.

PURPOSE	Create a shared view of how work moves, where it stalls, and which controls or handoffs need attention.
BEST FOR	Department leaders, operations teams, and process owners.

Workflow name	_____	Department	_____
Process owner	_____	Review date	_____
Trigger / start	_____	Final output	_____
Prepared by	_____	Participants	_____

What is the primary objective of this workflow?

1. Current-state process map

STEP	OWNER	ACTION / OUTPUT	SYSTEM OR TOOL	TYPICAL TIME
1				
2				
3				
4				
5				
6				
7				



2. Friction and controls

REVIEW AREA	OBSERVATION	IMPACT / RISK
	Delays or bottlenecks	
	Rework or error points	
	Unclear ownership	
	Manual handoffs	
	Missing approvals or evidence	
	Capacity or resource limits	

3. Improvement plan

PRIORITY	CHANGE / EXPERIMENT	OWNER	DUE DATE	SUCCESS MEASURE
High				
Medium				
Low				

Follow-up date and decisions

Use notes

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