Workflow Analysis Template

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Overview

Use this template to map a business process and find where work slows down.

Who this is for

Business analysts, operations leads, and IT PMs improving manual or fragmented processes.

When to use it

Before redesigning a system, automating steps, or writing requirements for a new workflow.

Template

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Workflow Analysis Template

Workflow name:
Business area:

Current process:
Step 1:
Step 2:
Step 3:
Step 4:
Step 5:

Who is involved?
What systems are used?
What documents are needed?
Where does the process slow down?
Where do mistakes happen?
Where do users get confused?
What data is missing?
What should be automated?
What should stay manual?

Improved process:
Step 1:
Step 2:
Step 3:
Step 4:
Step 5:

Success metrics:
Time saved:
Errors reduced:
Visibility improved:
User satisfaction:
```

Closing note

Business analysis starts by understanding how work happens today. Only then can you design a better process.