

KAYUS SYSTEMS

PRACTICAL WORKFLOW RESOURCE

Simple Workflow Mapping Worksheet

Map how work happens today before deciding whether it should be simplified, delegated, automated or kept manual.

The guiding principle

Simplify first. Automate second. Understand the workflow before choosing an implementation path.

Official Version 1

Document ID: KS-AA-003 | Version: 1.0 | Issued: 31 July 2026
Owner: Kayus Systems | Review cycle: Annual

START HERE

Instructions

Map one real workflow from its starting trigger to its ending outcome.

How to use this worksheet

1	Choose one workflow Select a recurring process with a clear beginning and end.
2	Use a recent real case Record what actually happened, not the ideal procedure.
3	Write the major steps Capture actions, decisions, approvals, handoffs and waiting points in sequence.
4	Mark friction without solving it Note repeated entry, errors, unnecessary steps and exceptions.
5	Review the whole map Simplify before making an implementation choice.

Important

A workflow map describes the current state. It is not a recommendation to automate, delegate or change the process.

PART 1

Workflow overview

Define the boundaries, purpose and participants before listing individual steps.

Workflow name	Business purpose
Starting trigger	Ending outcome
People involved	Tools currently used
Inputs required	Outputs produced

Current-state flow at a glance

Stage 1	Stage 2	Stage 3	Stage 4	Stage 5	Stage 6

Use short action phrases. Add detailed information in the step-by-step tables.

PART 2 - STEPS 1 TO 6

Current-state workflow mapping

Record the sequence exactly as it happens now.

No.	Action or activity	Person / role	Input	Output	Manual ?	Customer step?	Notes
1							
2							
3							
4							
5							
6							

Sequence check

If two actions happen at the same time, note that. If the path changes, record the decision or exception on the following pages.

PART 2 - STEPS 7 TO 12

Current-state workflow mapping

Continue the sequence. Leave unused rows blank.

No.	Action or activity	Person / role	Input	Output	Manual ?	Customer step?	Notes
7							
8							
9							
10							
11							
12							

Additional notes

Notes

PART 3

Decisions and approvals

Record where the route changes and where permission is required.

Decision points

Decision or question	Who decides	Possible paths	Information needed	What happens next

Approval points

Approval required	Approver	What is reviewed	Waiting point	If not approved

PART 4

Handoffs and delays

Show where ownership moves and where work waits.

Handoffs

From	To	What moves	How it moves	Confirmation	Risk or confusion

Waiting points

Where work waits	What it waits for	Who can unblock it	Typical cause	Notes

PART 5

Friction and duplication

Document repeated effort, exceptions and points where the workflow breaks down.

Repeated data entry	Duplicate work
Common exceptions	Error points
Customer-facing steps	Manual steps
Steps that may be unnecessary	Notes

Describe before judging

State what happens and where. Avoid assigning blame or assuming a particular solution.

PART 6

Reflection questions

Use the completed map to understand what the workflow needs.

1. Is the workflow's purpose and ending outcome clear?

2. Does every major step contribute to that outcome?

3. Where does information enter the workflow, and is it complete at that point?

4. Where do decisions or approvals slow progress?

5. Which handoffs create uncertainty, lost context or repeated follow-up?

6. Where is information entered, copied or checked more than once?

7. Which exceptions occur often enough to need a defined route?

8. Which steps are visible to customers, and what do they experience?

9. Which steps require judgement, accountability or sensitive communication?

10. What evidence should be checked before changing the workflow?

PART 7

Simplification review

Identify what should be clarified or removed before choosing how the work will be handled.

Step or issue	Why it may be unnecessary or unclear	What could be clarified, combined or removed	Who must confirm	Notes

Decision boundary

Only after the simplified workflow is understood should the business decide whether each step is best kept manual, delegated or assessed further.

PART 8

Next-step guidance

Turn the completed map into a careful process decision.

1	Validate the map Ask the people involved to correct missing steps, exceptions and handoffs.
2	Check real evidence Review suitable records, messages, forms or schedules rather than relying only on memory.
3	Simplify the sequence Remove avoidable steps, clarify ownership and reduce repeated information.
4	Protect necessary human work Keep judgement, accountability, sensitive communication and unusual decisions human-led.
5	Choose the handling of each step Decide whether it should be kept manual, delegated or examined further.
6	Test one small change Observe the result before relying on a redesigned process more widely.

Remember

The map exists to improve understanding. It does not prove that any particular implementation path is appropriate.

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