Business Process Discovery Worksheet

Choose one recurring piece of work. Use a recent real example, not the version everyone hopes happens. A rough first pass is enough; ask the people doing the work to fill in what you missed.

1 Choose the process

What work are you looking at? Name one specific process or recurring task.

What starts it, and what tells you it is finished? (Set the boundaries.)

Who receives the result—inside or outside the business?

What should a good outcome look like for them?

How often does this happen? Check one or add your own.

☐ Daily ☐ Weekly ☐ Monthly ☐ As needed ☐ Other: _____

Which recent example will you trace? Add a date, request, or project reference.

Who should help describe how this work actually happens?

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2 Trace the work

Follow the recent example from its trigger to its result. Include waiting, decisions, handoffs, rework, and the tools people use. Add a page if the work takes more than six steps.

Step	What happens and in which tool or place?	Who owns it and who receives it next?
1		
2		
3		
4		
5		
6		

Where does someone have to wait for information, a decision, or an approval?

Which steps happen differently depending on the situation?

3 Notice the friction

Look for patterns in the work, not people to blame. If you are unsure, mark it as a question to check with the team.

What showed up in the example? Check what applies.

☐ Missing information ☐ Unclear ownership ☐ Waiting or approval delay

☐ Repeated data entry ☐ Rework or errors ☐ Too many places to look

☐ Unwritten knowledge ☐ Exceptions with no clear path ☐ Other: _____

Where did work slow down, loop back, or get lost? What actually happened?

What exceptions or unusual requests change the normal path? Who decides what to do?

What is the effect when this goes wrong? Consider time, quality, customer experience, cost, or team capacity.

What information is missing? What would you need to observe or measure before deciding?

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4 Choose a practical next step

Separate what you observed from your best guess about the cause. Start with a small change you can test; the final solution may be simpler than expected.

The clearest problem we observed is…

We think it may be happening because… (What still needs to be confirmed?)

What kind of change might help? These are possibilities, not a required checklist.

☐ Clearer ownership or handoff ☐ Better information at the start

☐ Fewer steps or less rework ☐ A checklist, guide, or training

☐ A change in capacity or timing ☐ A tool or automation, after the process is clear

What is one small improvement we could try first? Who will own the test?

How will we know whether it helped? Choose one useful sign, then set a review date.

What did we learn after testing? What should we keep, change, or investigate next?

If the cause is still unclear, share your challenge through our inquiry form. Discovery helps define the scope for any paid assessment work.