

Process mapping worksheet

Map one job, its decisions and the information each person needs.

A blank editable process map

A record of steps, owners and different routes

A completed reporting example

A free worksheet from ailevrg.com/guides/process-mapping-template

Pick one job you can follow from beginning to end. The worksheet is optional; the SVG is a blank map you can edit or print.

01 Job boundary

Job we are mapping

What starts it

What counts as finished

Example we followed

02 People and information

People or teams involved

Information needed before work starts

Systems used and who can access them

03 Steps and decisions

Main steps and who performs each one

Decision that changes the route

Routes and the conditions for each

Missing information and the return route

04 Variations

What changes between clients or teams

Which part appears common

Variation that still needs its own map

05 Keep it useful

Person who will maintain the map

Event that should trigger an update

First change to investigate

A monthly reporting map

Invented teaching example. No client outcome is claimed.

Boundary

Request: prepare the agreed monthly client report.

Finish: a person reviews the figures and explanation before release.

Common steps

Check requirements, collect figures, validate the period, prepare a draft and review it.

Different routes

Client A needs performance against the agreed plan.

Client B needs an explanation for a change in one channel.

A missing data source returns the job to collection; it is not filled with an invented number.

Ownership

The account manager confirms changes in client requirements.

The analyst records a new analysis route before it becomes part of the next report.

Illustrative reporting route

1. Account manager

Confirm what this client needs

Check the agreed questions, reporting period and current requirements.

2. Reporting system and analyst

Gather the required figures

Use the sources for this version of the report. Flag a missing source rather than treating it as a zero.

3. Analyst

Choose the reporting route

A standard report follows the common route. A client-specific question needs its own analysis and explanation.

4. **Person responsible for the account**

Review the figures and interpretation

Check that the period, definitions and explanation match the client's situation.

5. **Account manager**

Release and record the version

Send the reviewed report and keep the requirements used to build it.

This is an invented map. Missing figures return to collection; a changed client requirement returns to the first step.