Workflow Improvement Checklist

A practical worksheet for defining outcomes before choosing solutions

1. Clarify the outcome

- ■ What problem are we solving?
- ■ Who experiences the problem and what is the impact?
- ■ What will success look like, in measurable terms?

2. Map the current process

- ■ Document the trigger, steps, owners, tools, and handoffs.
- ■ Identify dependencies, delays, repeated work, and exceptions.
- ■ Collect baseline data (time, volume, error rate, follow-ups).

3. Diagnose before designing

- ■ Confirm root causes with the people doing the work.
- ■ Identify which steps can be eliminated, simplified, or standardized.
- ■ Consider automation only where it addresses a validated problem.

4. Pilot and measure

- ■ Choose a small pilot with a clear owner and scope.
- ■ Capture baseline and after-pilot measurements.
- ■ Gather feedback, document risks, and decide what to improve next.

My desired outcome: _____

Success metric and baseline: _____