

# Process Mapping Worksheet

Map one process before you try AI on it | John H. Hodsdon

Use one sheet per process. Write down how the work really happens today, not how it should happen. Adapted from the Process Template in *The Dilemma*.

Process: \_\_\_\_\_ Mapped by: \_\_\_\_\_ Date: \_\_\_\_\_

Goal: One sentence. What gets better if this works? \_\_\_\_\_

What's stuck: Where does this process slow down or go wrong today? \_\_\_\_\_

**Step 1: Map Your Business** Write down how the work moves today. Every handoff. Every decision.

Trigger: What starts this process? \_\_\_\_\_

| # | What happens (each step) | Who does it | Hands off to | Time it takes or waits |
|---|--------------------------|-------------|--------------|------------------------|
| 1 |                          |             |              |                        |
| 2 |                          |             |              |                        |
| 3 |                          |             |              |                        |
| 4 |                          |             |              |                        |
| 5 |                          |             |              |                        |
| 6 |                          |             |              |                        |

Where it breaks or waits: \_\_\_\_\_

Where the data lives: Systems, paper, phones, people's heads. \_\_\_\_\_

**Step 2: Design the Fix** Describe what “good” looks like before anyone builds anything.

| What an AI agent could draft or do | What a person checks or approves |
|------------------------------------|----------------------------------|
|                                    |                                  |
|                                    |                                  |
|                                    |                                  |

What it will not do: \_\_\_\_\_

Data the agent needs: Only what the task needs, kept in your approved systems. \_\_\_\_\_

**Step 3: Build and Test** Build one small thing. Try it on real jobs. Keep it if it helps.

Small test: What, on which jobs, for how long? \_\_\_\_\_

| What we measure | Before | After |
|-----------------|--------|-------|
|                 |        |       |
|                 |        |       |
|                 |        |       |

Who checks: \_\_\_\_\_ Check date: \_\_\_\_\_

Done checks: ☐ Goal still true    ☐ What's stuck got better    ☐ A person approved what went out    ☐ Data stayed in approved systems

Decision: ☐ Keep it    ☐ Fix it and test again    ☐ Drop it    Next process to map: \_\_\_\_\_

# Example (fictional)

A made-up shop with generic details, to show one way to fill in the worksheet. Not a real company or real results.

**Process:** Following up on website form leads **Mapped by:** Owner and office manager **Date:** Week of the test

**Goal:** One sentence. What gets better if this works? Every website form lead gets a reply the same business day.

**What's stuck:** Where does this process slow down or go wrong today? Forms sit in a shared inbox, and replies depend on who's in the office.

## Step 1: Map Your Business

Write down how the work moves today. Every handoff. Every decision.

**Trigger:** What starts this process? A customer fills out the form on the Anytown Heating and Plumbing website.

| # | What happens (each step)                  | Who does it    | Hands off to   | Time it takes or waits |
|---|-------------------------------------------|----------------|----------------|------------------------|
| 1 | Form lands in the shared inbox            | Website        | Office manager | Waits in the inbox     |
| 2 | Read it; check if they're a past customer | Office manager |                | About 5 minutes        |
| 3 | Call or email back; ask about the problem | Office manager |                | About 10 minutes       |
| 4 | Repair: book a visit                      | Office manager | Dispatcher     | About 5 minutes        |
| 5 | Replacement: pass to sales for a callback | Office manager | Sales          | Waits for a callback   |
| 6 | Log the lead source in the lead sheet     | Office manager |                | Often skipped          |

**Where it breaks or waits:** Forms wait when the office manager is on the phone or out. Replacement callbacks can slip a day.

The lead source often doesn't get logged, so we can't tell which ads work.

**Where the data lives:** Systems, paper, phones, people's heads. Shared inbox, job software, a lead spreadsheet, and sticky notes.

## Step 2: Design the Fix

Describe what "good" looks like before anyone builds anything.

| What an AI agent could draft or do               | What a person checks or approves          |
|--------------------------------------------------|-------------------------------------------|
| Read each form and draft a first reply           | Office manager reads, edits, and sends it |
| Check the job software for a past customer match | Office manager confirms the match         |
| Log every lead and its source in the lead sheet  | Owner looks over the list each Friday     |

**What it will not do:** Quote prices, promise arrival times, or send anything without a person's OK.

**Data the agent needs:** Only what the task needs, kept in your approved systems. Form fields and past customer list (name, phone, past jobs).

No payment details. Stays in the job software and inbox. Owner controls access.

## Step 3: Build and Test

Build one small thing. Try it on real jobs. Keep it if it helps.

**Small test:** What, on which jobs, for how long? Website form leads only, office hours, for two weeks.

| What we measure                  | Before                         | After                  |
|----------------------------------|--------------------------------|------------------------|
| Time from form to first reply    | Check two weeks of inbox times | Fill in after the test |
| Leads with a source logged       | Count from the lead sheet      | Fill in after the test |
| Visits booked from website forms | Count from the job software    | Fill in after the test |

**Who checks:** Owner, with the office manager **Check date:** End of week two

**Done checks:** ☐ Goal still true ☐ What's stuck got better ☐ A person approved what went out ☐ Data stayed in approved systems

**Decision:** ☐ Keep it ☐ Fix it and test again ☐ Drop it **Next process to map:** Replacement sales callbacks

Decision boxes stay blank until the two-week check.