

PUBLIC SAMPLE FORMAT

# Workflow Map

A practical map of how work moves today: the trigger, source records, handoffs, approval points, failure cases, and the safest spots for automation.

█ SAMPLE ONLY - NOT A CLIENT MAP



## AUDIENCE

**Founder, operator, or process owner**

## PURPOSE

**Show the real path of work**

## OUTPUT

**Sources, handoffs, safe automation points**

HOW THE WORK MOVES TODAY

## The current path

This sample assumes a generic operator business where work starts in one place, depends on several systems, then waits for a person to approve or finish it.

**Mapping rule:** do not automate a workflow until the team can explain the trigger, the records used, the decision owner, and what happens when a tool or source is wrong.

### TRIGGER

#### A request enters the business

The work usually starts as an intake form, support ticket, email, lead, order event, calendar item, or internal task.

### SYSTEMS TOUCHED

#### Context lives in several places

The person doing the work checks website forms, CRM, inbox, helpdesk, payment records, shipping tools, calendar, notes, or accounting.

### HANDOFF

#### A human still owns judgment

The workflow needs a person to approve the response, confirm the quote, assign the task, publish the change, or make the financial call.

### FAILURE MODE

#### Work stalls when context is missing

The common failure is not effort. It is missing records, unclear ownership, stale instructions, or no obvious next step.

## Map fields we confirm

### ENTRY POINT

Where the work starts, who sees it first, and what information is available immediately.

### SOURCE RECORDS

The systems that hold the facts, plus which source wins when two tools disagree.

### APPROVAL OWNER

The person or role that owns the final decision before anything touches a customer or public surface.

WHERE AUTOMATION CAN HELP

## Candidate automation points

The map separates work that should stay human from work that can be prepared, drafted, routed, checked, or logged by an agent.

### RECOMMENDED LANE

#### Map before building the agent

Start by documenting the exact path of one repeated workflow. The map becomes the build input for prompts, tools, source rules, approval gates, and logging.

### AGENT-READY WORK

#### Prepare, draft, and route

- Collect context from approved sources
- Summarize the state of the workflow
- Draft the next response or internal task
- Route edge cases to the right owner

### HUMAN-OWNED WORK

#### Keep judgment with the team

- Final customer sends
- Refunds, quotes, and financial changes
- Public publishing and brand decisions
- Regulated or sensitive record handling

WHAT WOULD GO INTO THE MAP

## Workflow map components

The map should be detailed enough for a builder to understand the workflow without guessing, but simple enough that the team can review it quickly.

**01 TRIGGER.** Name what starts the workflow, where it arrives, which fields are required, and who sees it first.

**02 SOURCE RECORDS.** List every system the team checks, which fields matter, and which source wins when records conflict.

**03 DECISION POINTS.** Separate simple rules from judgment calls, exceptions, and edge cases that need human review.

**04 HANDOFFS.** Show who owns each step, what they receive, and what a completed handoff should include.

**05 LOGS AND OUTCOMES.** Define how the team will know the workflow moved, stalled, failed, or needs a follow-up.

**The point:** a useful map turns a messy workflow into a buildable system without pretending every decision should be automated.

MAPPING RISKS

## Risk flags we would call out

A useful workflow map is honest about where the process depends on tribal knowledge, undocumented exceptions, or tools that do not expose clean data.

OWNERSHIP

### No one owns the full path

If each team member owns one slice, the map may need a decision owner before automation can safely improve the whole workflow.

SOURCE OF TRUTH

### Tools disagree

If CRM, email, ecommerce, accounting, or support tools disagree, the map must define which source wins before an agent reads from them.

MANUAL EXCEPTIONS

### Too many hidden rules

If important steps live in someone's memory, the first deliverable may be documentation and cleanup before any agent work starts.

TOOL LIMITS

### Access may be blocked

Some tools have weak exports, missing APIs, or permission models that change the build plan. The map should flag that early.

## What the client gets next

BRIEF

A written map of the workflow, the source records, the handoffs, the decision owners, and the first safe automation candidates.

SPEC

If the workflow is a fit, the map becomes the input for a focused agent build spec with tools, permissions, prompts, and review rules.

QUOTE

The mapped workflow informs the quote. Builds start at \$5,000 and are custom-quoted after intake and discovery.