

Map one workflow before you automate it

The whole method, in one line:

Map it, measure it, fix it, then automate it.

This guide walks your team through the workbook, so you can write down how one piece of work really happens, measure how long it takes and decide what to change before anyone buys a new tool.

START HERE

Before you start

Get these five things ready before the first meeting because the map is only as good as the people in the room and the example you bring.

1

Pick one workflow

one that happens often and frustrates people

2

Invite the people who do it

not only the managers

3

Save your own copy

Excel, Google Sheets or Numbers

4

Bring one real example

a recent case, start to finish

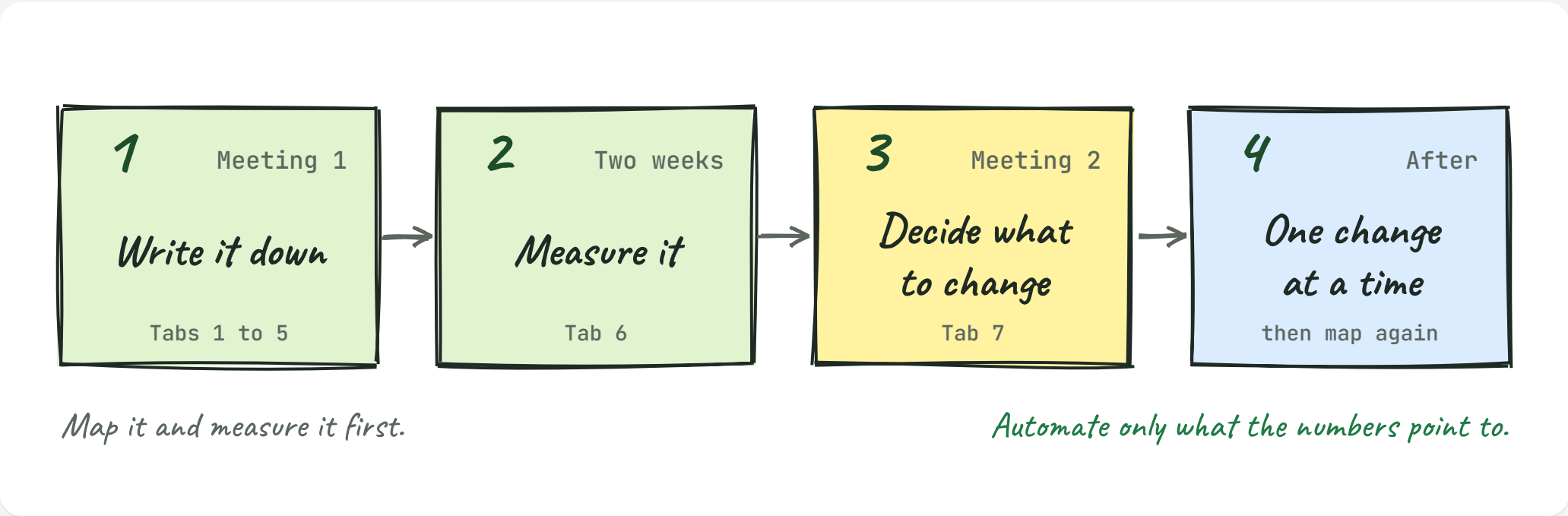
5

Book two meetings

two weeks apart

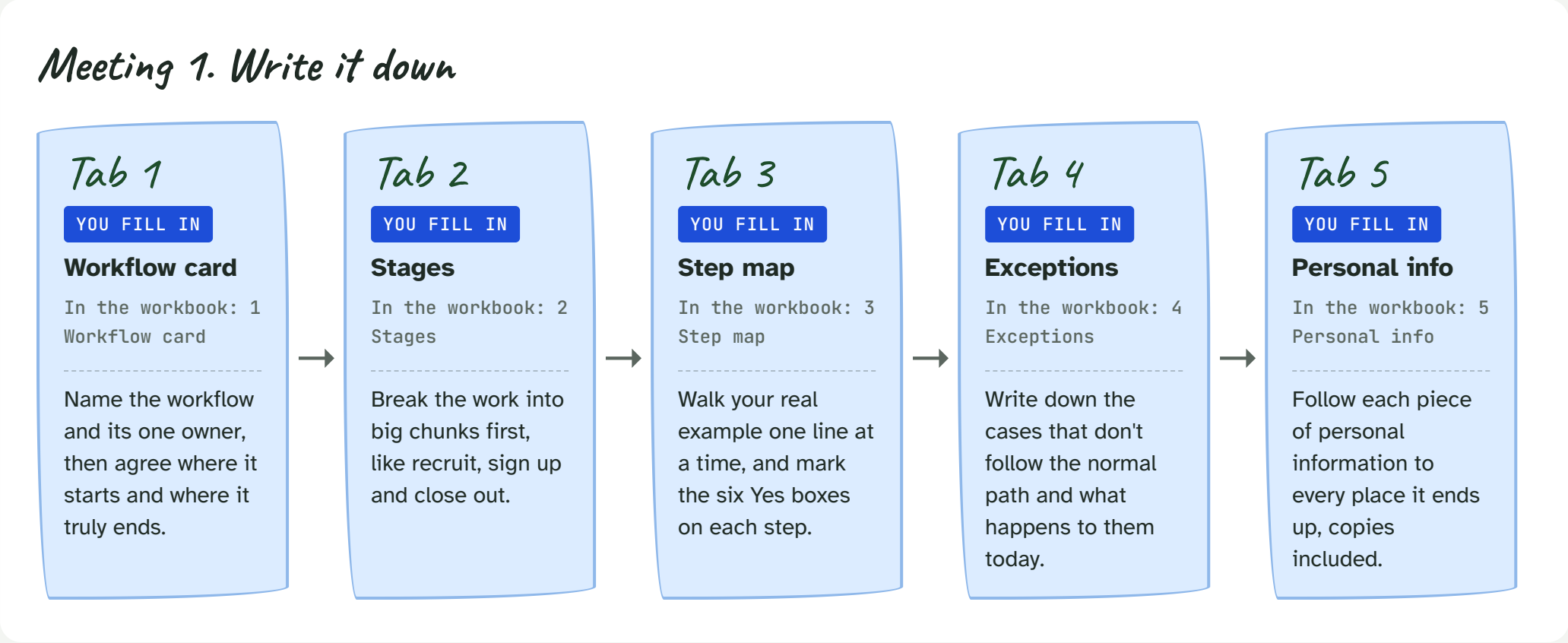
The plan

The workbook has seven tabs, and you use them at three moments: one meeting to write the work down, two weeks to measure it and a second meeting to decide what to change.

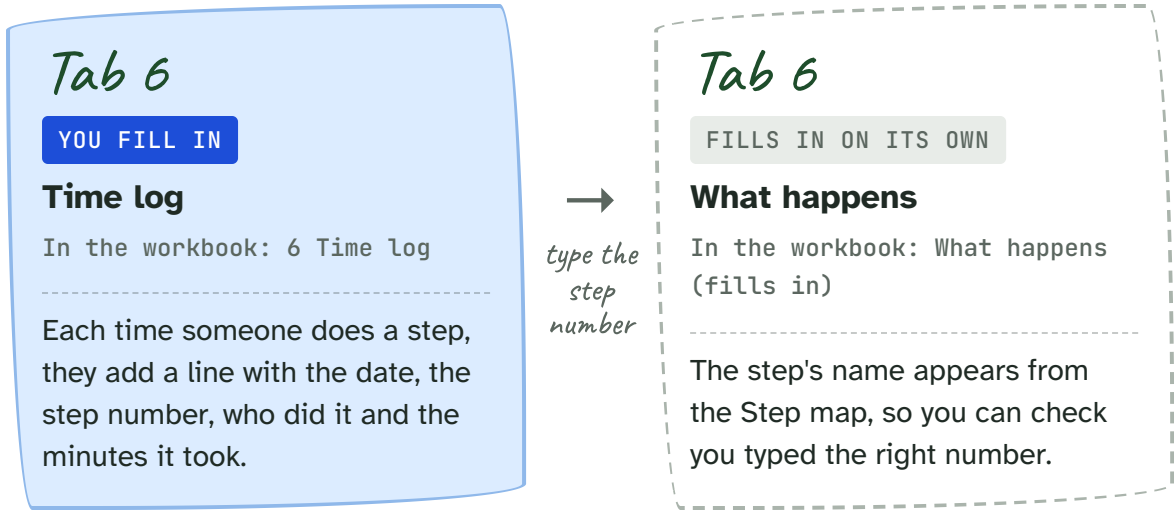


The 7 tabs, in order

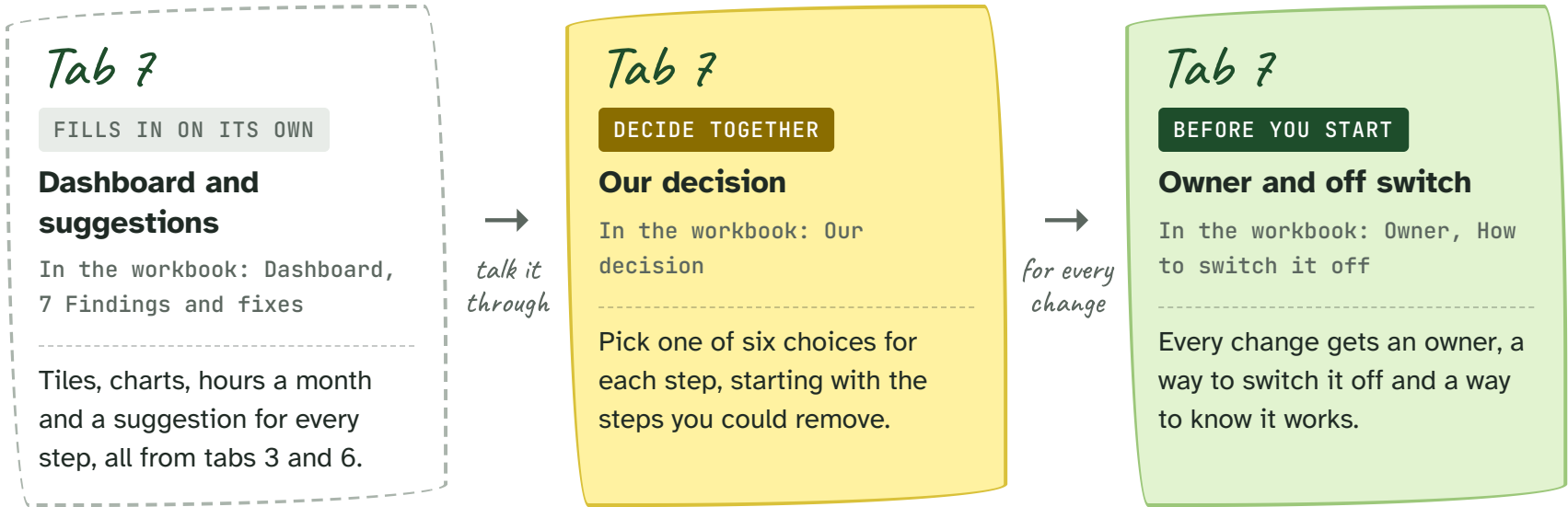
Each card is one tab in the workbook, and the colour tells you whether you type in it, whether it fills in on its own, or whether the team decides together.



The next two weeks. Measure it



Meeting 2. Decide what to change



The Example tabs

Every tab has an Example version filled in with a fictional volunteer program, so keep it open next to yours when you're not sure what to write, and delete the examples when you're done.

Map it as it is today

Write down what really happens, including the workarounds and the sticky notes on someone's desk, rather than how the work is supposed to go.

The six Yes boxes

Every step on the Step map has six Yes or No boxes, and the workbook uses them to suggest what you could do with that step.

Retyped?

Someone types information that already exists somewhere else, like copying a form into a spreadsheet.

Copy-paste?

The same text gets pasted into more than one place, like one volunteer posting on three websites.

Reminder?

Someone has to remember to nudge a person, like the email the night before a shift.

Waiting?

The work sits still until someone else replies, signs or sends something back.

Approval?

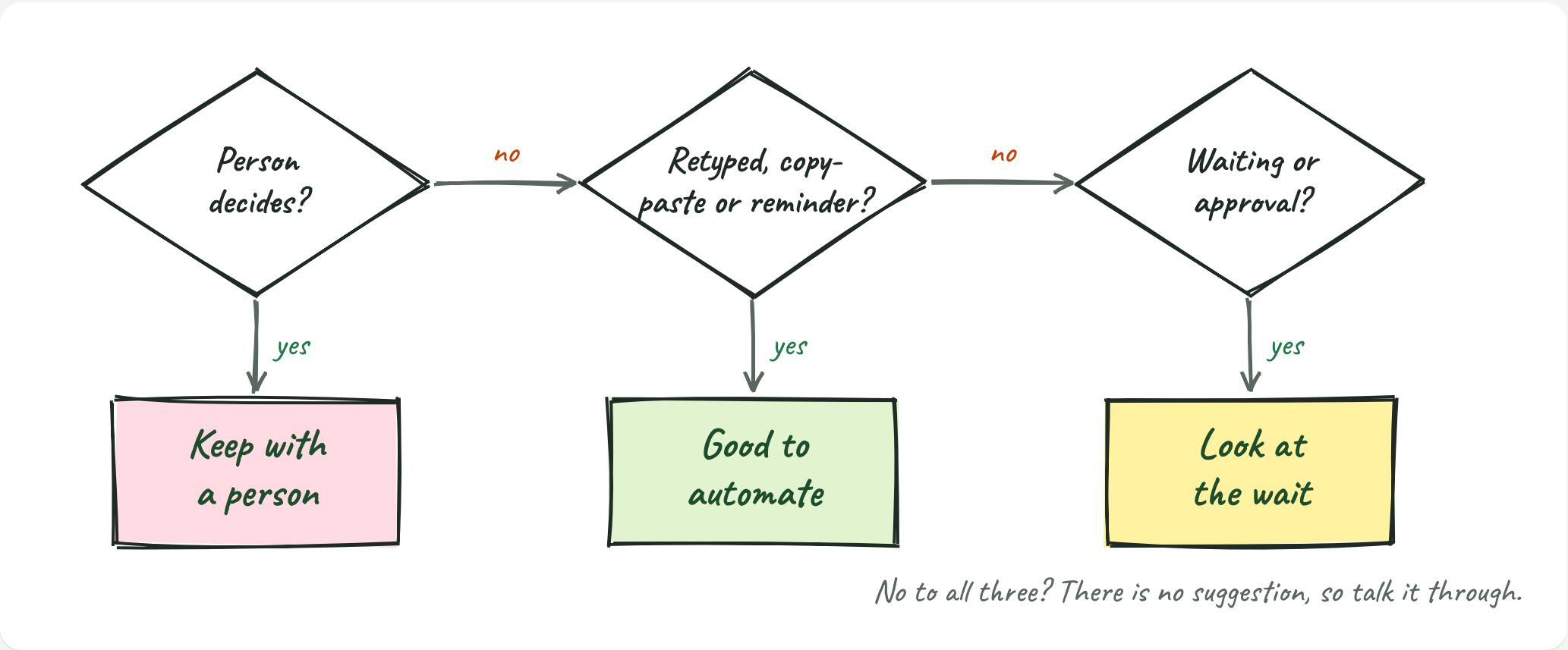
A person has to say yes before the work can move on, like a signature on a claim.

Person decides?

Someone uses judgement about a person, like who gets a role, help or money.

How the Suggestion column picks

The workbook asks three questions in this order and stops at the first Yes, so a step where a person decides always stays with a person.



And the Personal info box?

It sits beside the six and doesn't change the suggestion, but it shows you which steps need extra care when you change them.

Each day for two weeks

Ask everyone who does the work to log each step on the day they do it, since small jobs are easy to forget and they add up fast.

- 1

Do the step the way you always do

Don't speed up or skip anything because you're being measured, since the point is to see the real work.
- 2

Open the Time log tab

Add a new line under the last one, and leave the dark-text column alone.
- 3

Type the date and the step number

Use the number from the Step map, and the name of the step fills in on its own.
- 4

Add who did it and the minutes it took

A rough count is fine, and five minutes still counts.
- 5

Add a note if something was odd

A duplicate, a missing receipt or a long wait is worth a few words.

You're done when you have:

Two weeks of real numbers from everyone who does the work.

The Dashboard and Findings and fixes turn them into minutes per step and hours per month.

What it looks like

These rows come from the Example tabs, so the names and numbers are fictional. Blue text is yours to fill in, and dark text fills in on its own.

The Step map

Tab: 3 Step map · 4 more columns not shown

Step #	Stage	What happens	Who does it	Tool or place	Personal info?	Retyped?	Copy-paste?	Waiting?	Reminder?	Approval?	Person decides?
7	Sign up	Copy each sign-up into the volunteer spreadsheet	Volunteer coordinator	Spreadsheet	Yes	Yes	No	No	No	No	No
8	Sign up	Email each person to say we got their sign-up	Volunteer coordinator	Personal email	Yes	No	Yes	No	No	No	No
10	Screen	Get a police check and send a copy	Volunteer	Police service, email	Yes	No	No	Yes	No	No	No
11	Screen	Call one reference	Volunteer coordinator	Phone	Yes	No	No	Yes	No	No	Yes

The Time log

Tab: 6 Time log

Date	Step #	What happens (fills in)	Who	Minutes spent	Notes
2026-10-16	7	Copy each sign-up into the volunteer spreadsheet	Volunteer coordinator	25	Five sign-ups
2026-10-16	8	Email each person to say we got their sign-up	Volunteer coordinator	15	Five confirmation emails
2026-10-19	7	Copy each sign-up into the volunteer spreadsheet	Volunteer coordinator	20	Four sign-ups, one duplicate
2026-10-20	11	Call one reference	Volunteer coordinator	40	Three reference calls, two call-backs

Findings and fixes

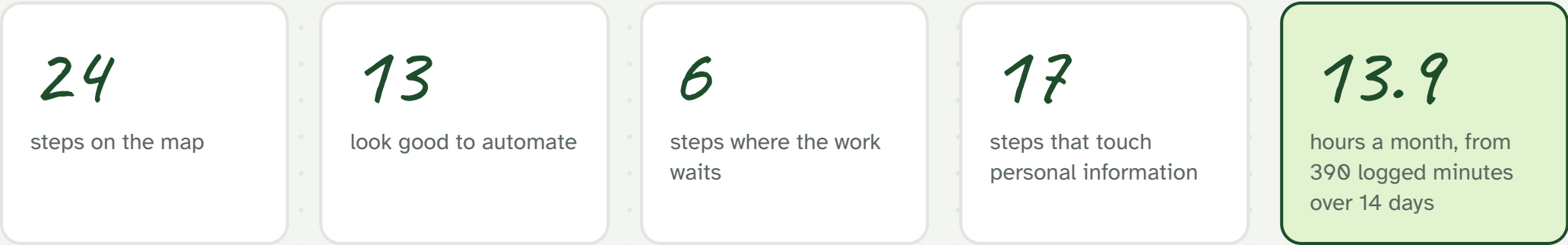
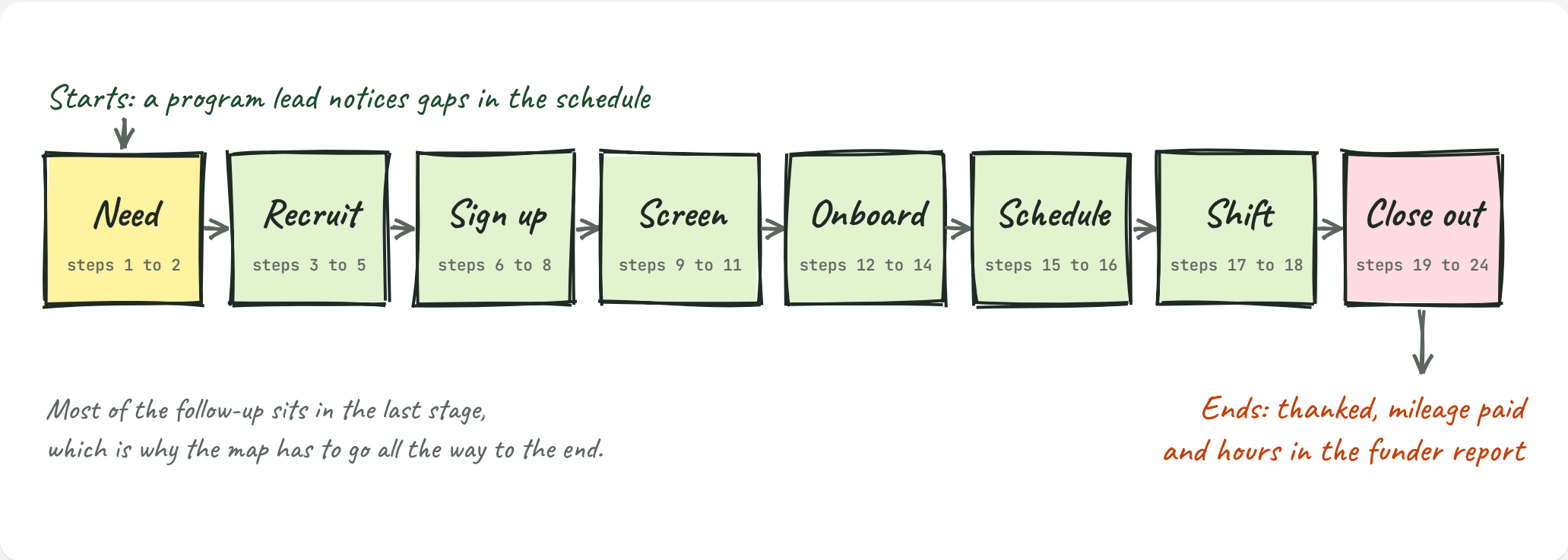
Tab: 7 Findings and fixes • 6 more columns not shown

Step #	What happens	Marks	Times logged	Minutes logged	Average minutes	Personal info?	Suggestion	Our decision	What we'll change
7	Copy each sign-up into the volunteer spreadsheet	1	2	45	22.5	Yes	Good to automate	Automate it	Send form entries straight to the volunteer spreadsheet
8	Email each person to say we got their sign-up	1	2	27	13.5	Yes	Good to automate	Automate it	Send an automatic confirmation from the shared inbox
10	Get a police check and send a copy	1	0	0		Yes	Look at the wait		
11	Call one reference	2	1	40	40.0	Yes	Keep with a person	Keep with a person	

The suggestion is a starting point for the conversation, and the team always makes the final call.

Volunteers, from the first ask to the last thank-you

The Example tabs follow a fictional program, Harbor Community Hub, from the moment a program lead notices gaps in the schedule until each volunteer has been thanked, paid back for mileage and counted in the funder report.



Where the work really ends

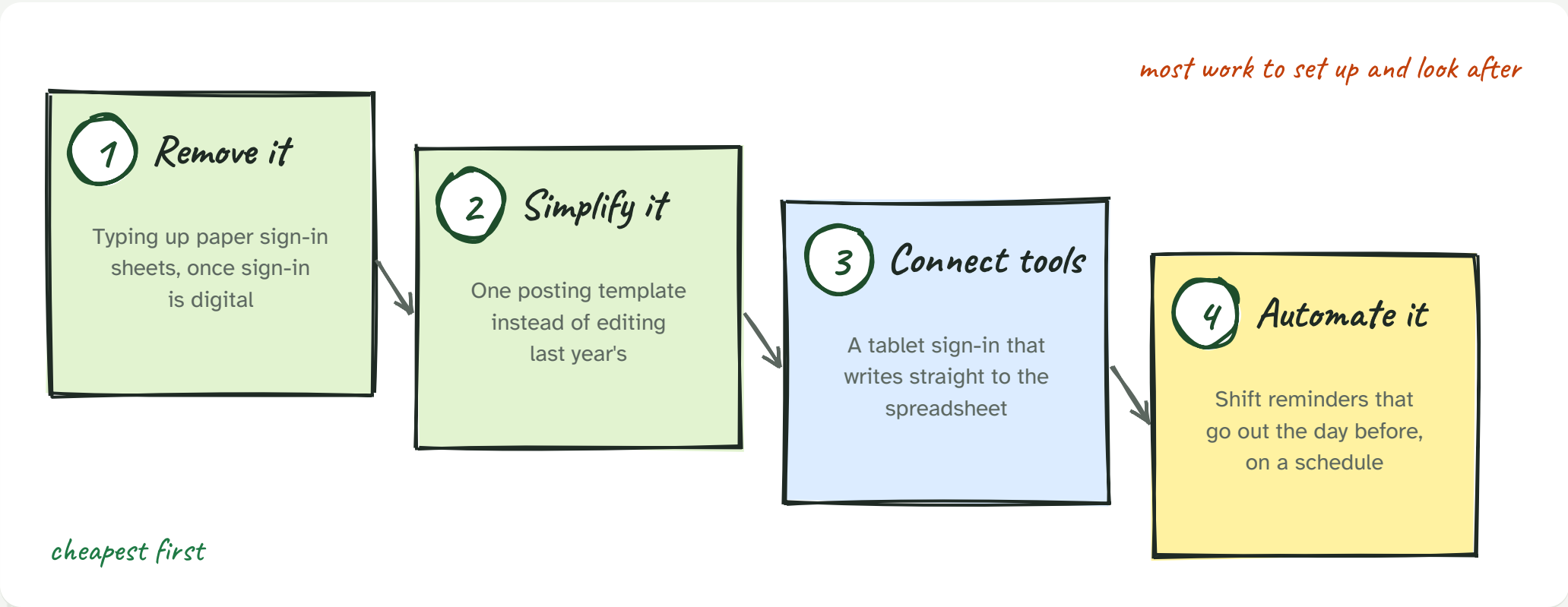
Most maps stop when the shift is over, but the follow-up is where things get missed: the thank-you, the mileage payment and the hours in the funder report.

Where it really starts

The work starts well before the sign-up form, when someone notices the schedule is short and has to ask for help.

Your six choices

For every step, the team picks one choice in the Our decision column. Try them in this order because the cheapest fix is often a step you no longer need.



Keep with a person

Reference calls, incident reports and anything where someone decides about a person. In the example, that's six steps.

Leave as is

Some steps already work well, like paying the mileage once a claim is approved, so leave them alone and move on.

Before you automate anything, fill in these three:

Owner

How to switch it off

How we'll know it works

If nobody can switch it off or tell when it stops working, it isn't ready yet, so keep it with a person for now.

House rules

Map it as it is

Write down how the work really happens today because the workarounds are the point.

Measure, don't guess

Time comes from the log and never from memory, so give it the full two weeks.

People decide about people

Who gets a role, help or money stays with a person, even when the steps around it are automated.

One workflow at a time

Once the first one is working well, map the next one.

Every change has an owner

It also needs an off switch and a way to tell when it stops working.

Shared places for personal info

Keep it out of personal inboxes and downloads folders, and decide how long you keep it.

NEXT STEP

Do it yourself, or get help

Do it yourself

You can download the workbook and this guide as a PDF from our website, and the free article there walks through the first meeting in more detail.

nimara.ca/workflow-mapping-workbook

Want help with it?

This is the work we do at Nimara. We sit with your team, map how the work really happens and connect your tools so it no longer depends on anyone's memory.

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