

Find the process bottleneck

Understand one workflow before you automate it.

For operations and program leaders: pick one recurring workflow, such as intake-to-assignment or request-to-approval. Use actual examples rather than estimates where possible.

01 / Define the outcome

Write the trigger, the end state, the customer, and what good means. Keep the scope to a workflow with one accountable owner.

02 / Map the handoffs

List the steps, queues, systems, and people involved. Mark every point where work waits, changes owner, or is re-entered elsewhere.

03 / Measure a baseline

Sample recent completed items. Record total elapsed time, hands-on time, rework, and exceptions. Note the sample size and date range.

04 / Find the constraint

Identify the step with the most consequential delay or rework. Ask whether the cause is missing information, unclear ownership, capacity, or a system limit.

05 / Test one small change

Choose a bounded change, such as a clearer intake form or routing rule. Name the owner, define success, and agree when to stop or reverse the test.

06 / Review before expanding

Compare results with the baseline and check quality, workload, and exceptions. Document what changed; scale only when the evidence supports it.

YOUR NEXT STEP

Bring a simple workflow map and three recent examples to a discovery conversation. Use them to decide whether the next step is process redesign, clearer ownership, or automation.

Workflow: _____ Baseline measure: _____ Owner: _____

An Ellihan educational worksheet. Any improvement target should be validated against your own baseline; no client outcomes are represented.