DISCOVERY

Watch the work, not just the SOP.

A simple, reusable operating tool for teams that want clearer handoffs and less status chasing.

Use this on one real workflow

- ☐ Choose one real lead/job/report that recently moved end-to-end
- ☐ List every system, spreadsheet, inbox, chat, and paper step touched
- ☐ Record who makes each decision
- ☐ Mark every ownership change
- ☐ Mark every wait state and why it waits
- ☐ Note re-entry/duplicate data
- ☐ Capture workarounds and “we usually…” steps
- ☐ Record what triggers customer/internal updates
- ☐ Identify what managers ask for manually
- ☐ Compare the observed path with the documented process

Design notes

- Do not correct the team while observing; first understand why the workaround exists.
- Ask “what happens when this person is out?”
- Ask “how would anyone know this is stuck?”

How to use it. Do not complete this from memory in a conference room. Pull up one active or recently completed record and test the checklist against what actually happened. Any item that repeatedly needs a text, a side spreadsheet, or an owner stepping in is a candidate for workflow redesign.

Want a real answer for your workflow? Book a free 30-minute Workflow Assessment at bradleyhankins.com/contact.