

Process Mapping Workshop Toolkit

Jefferson Otonbara Imgbi | RDE Digital Digest
Version 1.0 • 8 October 2026

Purpose and audience

Prepare, capture and validate a small current-state process before proposing a change.

Facilitators, business analysts and small teams exploring how work currently happens.

Use the tools in sequence

1. Define a narrow start and end point. Invite people who perform and receive the work.
2. Complete the workshop brief and gather a real, suitably anonymised example.
3. Capture the actual steps and handovers with observation IDs. Separate observed facts from assumptions.
4. Validate the map with participants and select one question to investigate rather than redesigning everything.

Files and working method

Save a personal copy of the Word file to type into the forms. Use the PDF as a printable version. The PDF has no interactive form fields. Duplicate a tool page when you need more records. Retain the same record IDs across the three tools and record the date and version when you make a change.

The toolkit supports a workshop and an evidence record. It does not establish a measured improvement or a Lean Six Sigma certification.

Tool 1: Workshop brief

Keep the scope small enough to discuss using a real example. State whose perspective may be missing.

Record date: _____ Version: _____

Workshop ID and process name

Start trigger and end result

Included work and excluded work

Participants and their process roles

Example record and permission to discuss

Questions, preparation and session timing

Tool 2: Step and handover capture

Use S01, S02 and similar step IDs. Record exceptions where they occur instead of hiding them in a note at the end.

Record date: _____ Version: _____

Step ID and preceding step

Person or role performing the step

Input, action and output

Next recipient and handover channel

Waiting, exception or rework observed

Evidence or assumption label and source

Tool 3: Validation and investigation plan

Read the sequence back to people who do the work. Record disagreements and evidence needed to resolve them.

Record date: _____ Version: _____

Workshop ID and map version

Steps confirmed and by whom

Missing steps or disputed sequence

Question to investigate and linked step IDs

Evidence to collect, owner and date

Validation result and next review

Worked example

Fictional example for practice. Adapt the structure, not the facts.

W01 maps a fictional course enquiry from receipt to reply. S02 is checking available places; S03 is sending a reply. One participant assumes checks happen immediately, while another describes a daily batch. The capture sheet labels the timing as disputed. The validation plan asks the administrator to observe five practice enquiries and record when S02 starts. The team postpones a software recommendation until the current sequence is understood.

Review your completed pack

Can another participant follow the boundaries, step IDs, handovers and unresolved questions without your explanation?

- All three tools use matching record IDs.
- Facts and assumptions are distinguishable.
- Outstanding actions have an owner and a date.
- Confidential information and credentials are excluded.
- The next reviewer can find the supporting evidence.

Your next action

Action: _____

Owner: _____ Due date: _____

Completion evidence: _____

Use and attribution

Original RDE educational forms. Personal and internal organisational adaptation permitted with Jefferson Otonbara Imgbí author credit retained. Review the adapted forms for your context before use.