



Workflow Mapping Guide for Automation

Introduction: Why Workflow Mapping Matters

Automation isn't about throwing bots at problems, it's about redesigning processes to run smarter, faster, and more reliably. Workflow mapping is the bridge between "we think" and "we know" exactly where automation will deliver ROI."

This guide helps visualize, analyze, and prioritize automation opportunities in your organization.

Phase 1 – *The Foundation*

Step 1: Select the Right Process - Choose a process that is:

- High volume (runs frequently)
- Rule-based (clear decision logic)
- Painful (causes delays, errors, or frustration)
- Strategic (directly impacts customers or revenue)

Example: Invoice processing in Accounts Payable

Step 2: Define Boundaries - Clarify the start and end of the process.

- Start: Vendor sends invoice.
- End: Payment posted in ERP.

This prevents scope creep and keeps the analysis focused

Step 3: Map Roles and Systems - List all people and systems involved.

- Roles: AP clerk, manager, finance controller.
- Systems: Email, ERP, spreadsheets.

Tip: Use swimlanes to show handoffs between roles and systems

Step 4: Document Steps and Decisions - Break the process into sequential actions:

1. Invoice received via email.
2. Clerk enters data into ERP.
3. Manager approves payment.
4. Controller releases funds.

Flag decision points (e.g., "Is invoice valid?") and exceptions (e.g., "Missing PO number").





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Phase 2 – The Selection Process

Step 5: Identify Pain Points & Automation Use Cases

Look for:

- Manual data entry
- Bottlenecks (waiting for approvals)

Download our “Process Audit Checklist” for more of what to look for!

Step 6: Apply Metrics

Also in our “Process Audit Checklist” for Key Metrics!

Step 7: Prioritize Opportunities

Rank automation candidates by:

Focus on the top 2–3 opportunities for immediate ROI

Yep, we have more in our Free Download “A.I. Use Case Priority Matrix”

Step 8: Build the Automation Blueprint

Document:

- Tasks to automate
- Systems to integrate
- Metrics to track
- Risks to mitigate
- Change management plan

Or... Have it done right and visit www.donerightai.com

Executive Insight

Workflow mapping isn't just a technical exercise, it's a strategic tool.

It helps leaders:

- Quantify inefficiencies
- Align teams around priorities
- Build a business case for automation
- Ensure ROI is tracked and communicated.

Bottom Line: Map it, measure it, automate it.

That's how you turn inefficiency into opportunity.

