RESOURCE 02 - PRACTICAL GUIDE

Describe a business process on one page.

A worksheet to make work visible, build shared understanding and identify topics to examine.

01	02	03
Choose	**Describe**	**Connect**
A specific activity with an identifiable start and finish.	A recent case with the people who actually handled it.	The stages, people, tools and information exchanged.

Six things the description should show

The trigger	What starts the activity? A request, deadline or event...
The stages	What actually happens, in what order and with what waits?
The people	Who acts, who receives information and who decides?
Tools and data	Which records are used? What information is received or produced?
Checks and exceptions	Who approves? What happens if information is missing or a case is unusual?
The outcome	When is the activity complete? What record confirms this?

Describe work as it really happens.

Include messages, intermediate files and informal checks. A step carried out from memory or in a notebook is also part of the process.

The worksheet fits on one page. Group the work into four main stages. For a longer activity, continue in “Notes and continuation” or on a second worksheet, identifying the handover point.

At the end: you have a shared picture to review with the team and a starting point for examining possible improvements.

RESOURCE 02 - WORKSHEET

Your process, on one page.

Describe a usual case with action verbs. Identify handovers and approvals.

Activity name

E.g. from the customer request to the quotation being sent.

People involved

Who contributed to this description?

Start: what triggers the activity

An observable event.

Finish: expected outcome and record

How you know the work is complete.

	Stage / action	Who acts?	Tools / information	Outcome / approval
1				
2				
3				
4				

Exceptions and human intervention

Incomplete case, approval refused, person absent...

Observed difficulties

Re-entry, waits, errors, information that cannot be found...

A measure to check

Volume, lead time, frequency or number of corrections.

First question to examine

The point the team would like to clarify.

RESOURCE 02 - COMPLETED EXAMPLE

From the first message to the quotation being sent.

An example process with its people and checks. Adapt it to how your business really works.

FICTIONAL TEACHING EXAMPLE - MAINTENANCE SME

Start

A customer sends a request by email.

Finish

The approved quotation is sent and filed in the customer record.

Stage / action	Who acts?	Tools / information	Outcome / approval
01 - Clarify	Administrator	Customer email and quotes.xlsx. Check the need and contact details.	Request completed. Ask the customer if information is missing.
02 - Cost	Technician	Clarified request and service catalogue. Prepare the cost estimate.	Draft quotation ready for review.
03 - Approve	Manager	Draft quotation and pricing rules. Check the scope and amount.	Approval or return to the technician for correction.
04 - Send and file	Administrator	Email, approved quotation and shared folder. Update the tracker.	Quotation sent, version filed and status updated.

Exception to plan for

An incomplete request returns to the administrator. A rejected quotation goes back to the technician before approval is sought again.

Observed difficulty

Information is copied into several records; the approval status can be difficult to find.

A useful first investigation

Compare a few cases to check available dates, waits and re-entry. The oral estimate of 20 requests per week needs confirmation; this worksheet alone does not establish any gains.

Would you like to explore your situation? Let's talk at your pace.
contact@tinor.fr · **tinor.fr**

RESOURCE 02 - CONTINUATION SHEET

Notes and continuation.

For a detailed answer, write “see continuation” in the worksheet and identify the relevant section here. You can also continue a process or add another source.

Continuation 1 - relevant section, stage or source

Details to keep

Continuation 2 - relevant section, stage or source

Details to keep

Continuation 3 - relevant section, stage or source

Details to keep

Describe useful information without copying sensitive data, passwords or access keys. Duplicate this page if needed.