

# Map a task

Fill in on screen or print. Start with a recent example and follow the work to the end.

## 01 Define the task

|                           |                    |
|---------------------------|--------------------|
| Task                      | Person responsible |
| <div></div>               | <div></div>        |
| What starts the task?     | When does it end?  |
| <div></div>               | <div></div>        |
| What is outside this map? |                    |
| <div></div>               |                    |

## 02 Follow the current process

Include enquiries, checks and corrections. Use another copy of this page for more steps.

| # | Person and tool | Work and data used | Result, wait or exception |
|---|-----------------|--------------------|---------------------------|
| 1 | <div></div>     | <div></div>        | <div></div>               |
| 2 | <div></div>     | <div></div>        | <div></div>               |
| 3 | <div></div>     | <div></div>        | <div></div>               |
| 4 | <div></div>     | <div></div>        | <div></div>               |
| 5 | <div></div>     | <div></div>        | <div></div>               |

If information is missing or something fails, map that path too.

# Choose the first improvement

Observe real cases before deciding. Write “not yet measured” where you have no data.

## 03 Record the current situation

Observation period

Tasks completed in this period

Human work per task • unit

Waiting time per task • unit

Common errors, corrections and exceptions

## 04 Choose the type of improvement

First check what you can simplify and what your current tools can already do.

- |                    |                                                     |
|--------------------|-----------------------------------------------------|
| <b>Simplify</b>    | Remove a step that is no longer needed.             |
| <b>Configure</b>   | Use a feature of the existing tool.                 |
| <b>Integrate</b>   | Move data between tools.                            |
| <b>Build</b>       | Meet a need the current options do not cover.       |
| <b>Keep manual</b> | Keep a human decision or an infrequent task manual. |

Which step will you improve, with which option and why?

What stays manual? Who checks? Which costs and team effort must you include?

# Plan and evaluate the test

Agree a small test with the people doing the work. Define how to decide whether to continue.

## 05 Plan the test, including failures

Step and change to test

Who checks and resolves exceptions?

Cases to test • complete, missing details, duplicate and failed entry

On failure: how do you report it, avoid duplicates and restore the previous process?

## 06 Compare the complete workload

Use comparable tasks and periods. Count preparation, checking, corrections and follow-up.

Period before the test

Period after the test

METRIC / UNIT

BEFORE

AFTER

Human work per task (min)

Waiting time per task (min)

Errors and corrections (total)

Tasks completed (total)

What result justifies continuing? Include quality, failures, costs and maintenance.