OPEN WORKFLOW TEMPLATE

Document the work before you delegate it.

One workflow. 15 readiness statements. A working record for outcomes, operator judgment, evidence, permissions, exceptions, and the release gate.

Complete the template from observed work and recent cases. Policy documents are supporting evidence. The operating record should show what people actually do, where judgment enters, and who owns the unusual case.

1. Workflow identity

WORKFLOW NAME

FUNCTIONAL AREA

STARTING EVENT

FINISH CONDITION

OUT-OF-SCOPE BOUNDARY

BUSINESS OUTCOME

OUTCOME OWNER

CURRENT BASELINE

TARGET AND TIME WINDOW

2. Evidence used to build this document

CASE	DATE	RESULT	OPERATOR	WHY THIS CASE MATTERS
1				
2				
3				
4				
5				

- [ ] Current policy or SOP
- [ ] Recent completed cases
- [ ] System screenshots or records
- [ ] Operator interview
- [ ] Direct observation
- [ ] Exception or override log
- [ ] Quality or outcome data
- [ ] Variations from other teams or sites

3. Workflow map

Add one row for every meaningful step, decision, or handoff.

#	TRIGGER OR INPUT	ACTION	EVIDENCE USED	DECISION OR JUDGMENT	OUTPUT	NEXT OWNER
1						
2						
3						
4						
5						
6						

#	TRIGGER OR INPUT	ACTION	EVIDENCE USED	DECISION OR JUDGMENT	OUTPUT	NEXT OWNER
7						
8						

4. Operator judgment interview

Ask these questions while reviewing a recent case. Turn each answer into an observable rule.

- [ ] Which mismatch matters here?
- [ ] Which source wins when 2 records disagree?
- [ ] What makes this case unusual?
- [ ] What would make you stop the workflow?
- [ ] When can the normal queue be overridden?
- [ ] Who needs a call before the system changes?
- [ ] What would a new operator miss?
- [ ] What does a strong result look like?

JUDGMENT CALL	EVIDENCE THE OPERATOR NOTICES	RULE OR THRESHOLD	OWNER

5. Context and access inventory

STEP	SYSTEM OR SOURCE	FIELDS OR DOCUMENTS	ACCESS REQUIRED	FRESHNESS REQUIREMENT	SOURCE PRECEDENCE

STRONG DECISION

WEAK DECISION

EDGE CASE

6. Decision-rights map

Observe: reads the work and records evidence. A person decides and acts.

Recommend: proposes an action with supporting evidence. A person decides and acts.

Act with approval: prepares or executes after a named person approves.

Act autonomously: acts inside explicit thresholds. Exceptions move to a named person.

DECISION	PERMISSION MODE	HUMAN OWNER	EVIDENCE REQUIRED	TAKEOVER THRESHOLD	ESCALATION PATH	REVIEW CADENCE

7. Exception register

EXCEPTION TYPE	OBSERVABLE TRIGGER	IMMEDIATE SAFE ACTION	FINAL OWNER	RESPONSE TIME	EVIDENCE FOR RESOLUTION

- [ ] One person can make the final call.

- [ ] The escalation route has no approval hunt.
- [ ] The immediate safe action is explicit.
- [ ] The response-time expectation is named.
- [ ] Resolved exceptions can update the standard workflow.

8. Quality and refresh loop

PRIMARY QUALITY MEASURE

CURRENT RESULT

TARGET RESULT

FAILURE LOG LOCATION

REVIEW OWNER

REVIEW CADENCE

NEXT REVIEW DATE

- [ ] Result quality
- [ ] Human overrides
- [ ] Exceptions
- [ ] Rework
- [ ] Failed handoffs

- [ ] Time to resolution
- [ ] Source or policy changes

9. The 15-statement readiness check

Score each statement using evidence available today. Total the 3 statements in each dimension, then name the weakest layer.

`0 · No evidence` This does not exist today.	`1 · Mostly informal` People handle it from experience.
`2 · Documented` The rule exists and people can find it.	`3 · Owned and tested` A named owner checks that it works.

Outcome clarity

The workflow has a measurable finish line and one person accountable for the result.

STATEMENT	SCORE
One named person owns the business outcome this workflow is meant to produce.	
The team can state the baseline, target, and time window for that outcome.	
The workflow has a clear starting event, finish condition, and out-of-scope boundary.	

SUBTOTAL: ____ / 9

Workflow truth

The documented process matches the work people actually perform, including the workarounds.

STATEMENT	SCORE
The workflow was captured by observing recent work, including the differences from the written policy and ideal process.	
The documented workflow includes the common exceptions, workarounds, and judgment calls.	
Different versions across teams or sites are reconciled into one standard or explicitly named as valid variants.	

SUBTOTAL: ____ / 9

Context and system access

The information, examples, and permissions required to do the work are known and available.

STATEMENT	SCORE
Every system, field, document, and source needed to complete the workflow is inventoried.	
Required access and permissions are defined for each step, including restricted information.	
Approved examples show what a good decision, weak decision, and edge case look like.	

SUBTOTAL: ____ / 9

Decision rights and exception ownership

The workflow says what can proceed, what needs approval, and who owns the unusual case.

STATEMENT	SCORE
Each decision is assigned a permission mode: observe, recommend, act with approval, or act autonomously.	
Risk, confidence, or dollar thresholds state when a human must take over.	
One named person owns exceptions and can make the final call without an approval hunt.	

SUBTOTAL: ____ / 9

Evaluation and refresh loop

Quality is measured, failures become evidence, and the workflow changes when the work changes.

STATEMENT	SCORE
A quality measure tests the result of the workflow, not just whether every step was completed.	
Failures and overrides are logged in a form the workflow owner can review.	
A named owner reviews performance and refreshes the workflow on a fixed cadence.	

SUBTOTAL: ____ / 9

TOTAL / 45

WEAKEST DIMENSION

10. Release gate

- [ ] A second operator can follow the workflow.
- [ ] They can identify where authority changes.
- [ ] They can name the evidence required at each decision.
- [ ] They know what triggers a human takeover.
- [ ] They know who owns an exception.
- [ ] The quality measure tests the business result.
- [ ] A named owner can update the workflow.
- [ ] Separate security, privacy, compliance, and production-control reviews are planned.