Map one workflow. See where it gets stuck.

A practical way to follow work through your business before deciding what to change. Start small: one recent job, one process and the people who actually handled it.

01

Choose a clear start and finish.

For example: a customer asks for a quote, through to an accepted quote and a scheduled job. Keep this first map to one manageable workflow.

02

Walk through a real example.

Ask the person doing the work to show you every step, including messages, spreadsheets, checks and workarounds. Record what happens today.

03

Capture each handover.

For every step, note the owner, information received, tool used, output, active time and waiting time. Look for repeated entry or missing information.

04

Choose one worthwhile next question.

Mark the largest delay or repeated task. Check how often it happens and what it costs using your own records. Agree what needs investigating before building.

Want help mapping your operation?

Book a free 45-minute diagnostic call with Zeet.

Follow one enquiry.

Illustrative example only. This is a way to organise the conversation, not a client case study or a claim about results.

01 / ENQUIRY

A request arrives by phone or email.

Ask: Who records it? Where does it live? Who owns the next step?

02 / QUOTE

The team gathers information and prepares a price.

Ask: What gets copied? What is missing? How is follow-up tracked?

03 / JOB

A confirmed job moves from the office to the field.

Ask: Can the crew find the latest details? How are changes captured?

04 / INVOICE

Completed work becomes an invoice, then payment.

Ask: What holds up invoicing? How do extras make it onto the bill?

For every handoff, capture the person, system and evidence. Mark a question when you do not yet know the answer. Verify it with the people doing the work.

Put your workflow on one page.

WORKFLOW

STARTS WHEN

FINISHES WHEN

STEP	OWNER	INFORMATION / TOOL	ACTIVE TIME	WAIT / ISSUE

THE BIGGEST REPEATED STEP OR DELAY

HOW OFTEN IT HAPPENS / WHAT WE NEED TO CHECK