

THE NEXA SOLUTIONS

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Process Mapping Template

A blank, fillable template for mapping a business process clearly — before automating any part of it.

A free template from The Nexa Solutions · thanexasolutions.com

Map It Before You Automate It

Automation makes a clear process faster and an unclear process fail faster and more consistently. This template exists to force the clarity first — writing down every real step, who does it, what tool they use, and where it actually breaks down — before anyone starts building anything.

Fill this out by observing or interviewing the person who actually does the process today, not by describing how it's supposed to work in theory. The gap between the two is usually where the real automation opportunity is.

Map the real process, not the ideal one

Include the workarounds, the manual double-checks, and the “we just call Sarah if that happens” exceptions — these are exactly the details that get missed and then cause problems after automation.

SECTION 1

Process Overview

1. What is this process called, and in one sentence, what does it accomplish?

e.g. "New customer onboarding — gets a signed customer set up and ready to use the product"

2. What specifically triggers this process to start?

e.g. a signed contract, a form submission, an order confirmation

3. What marks this process as complete?

4. Who is the process owner — the person accountable for it working correctly?

SECTION 2

Step-by-Step Map

List every step in order, exactly as it happens today — including manual checks, waiting periods, and handoffs between people.

#	Action	Who Does It	Tool/System	Time Taken

SECTION 3

Decision Points & Branches

List every point where the process branches depending on a condition — these are the places automation most commonly breaks if they're missed.

After Which Step?	Condition / Question	If Yes →	If No →

SECTION 4

Inputs & Outputs

5. What information or materials does this process need to start? Where does each come from?

e.g. customer name and email (from the signed contract), product selection (from the sales order)

6. What does this process produce, and who or what receives it next?

e.g. an active customer account (used by the support team), a welcome email (sent to the customer)

SECTION 5

Roles & Handoffs

List every person or team involved and exactly what they hand off, and to whom.

Role	Responsible For	Hands Off To

SECTION 6

Pain Points & Bottlenecks

Check anything that's currently true for this process.

- ☐ The same information gets typed or copied manually between two or more systems
- ☐ There's a step where the process regularly waits on one specific person
- ☐ Errors or rework happen often enough that people expect them
- ☐ No one has full visibility into where a given item currently is in the process
- ☐ The process relies on someone remembering to do something, with no reminder or check
- ☐ There's at least one "workaround" step that only exists because something upstream doesn't work well

Describe the single biggest bottleneck in this process:

SECTION 7

Automation Opportunity Notes

Looking back at Section 2, mark which steps are strong automation candidates — repetitive, rule-based, and consistent.

Step # (from Section 2)	Why It's a Good Candidate	Priority (H/M/L)

How The Nexa Solutions can help

Once a process is mapped this clearly, we can tell you quickly which steps are worth automating and how — and build the automation itself. Visit thanexasolutions.com/contact to book a free consultation and walk through your completed map.