

BIZ WITH BECS

Process Flow Template

Map any process from start to finish, with roles, steps, decisions, and handoffs.

Process Name	e.g. Client Onboarding, Hiring Process, Monthly Close
Process Owner	
Date	
Version	1.0

Part 1 · Linear Process Flow

Write the action, responsible role, and tool/system for each step. Steps 1 to 4 are on the top row, 5 to 8 below.

STEP 1 Action Who Tool	STEP 2 Action Who Tool	STEP 3 Action Who Tool	STEP 4 Action Who Tool
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Steps 5 through 8 continue below ▼

STEP 5 Action Who Tool	STEP 6 Action Who Tool	STEP 7 Action Who Tool	STEP 8 Action Who Tool
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► **START** (what kicks this off)

■ **END** (the outcome that means it's done)

HOW TO FILL THIS OUT

One verb per step. "Send onboarding email" or "Approve contract," not "Handle the client." If a step requires a yes/no decision, capture it in Part 3 instead.

START is the trigger that kicks the process off. END is the specific outcome that means it's done. If your process has multiple endings (approved, rejected, escalated), pick the most common one for the linear flow and let the others surface in Part 3.

Part 2 · Swimlane View

Write each role name across the top. For each step, mark X or write a brief action (Approves, Reviews, Sends) under the role that's actively doing the work.

Step	Role 1	Role 2	Role 3	Role 4	Role 5
Step 1					
Step 2					
Step 3					
Step 4					
Step 5					
Step 6					
Step 7					
Step 8					

HOW TO FILL THIS OUT

Mark only the steps where a role is actively doing the work, not just informed or observing. If you find yourself marking every step for one person, that role might be a bottleneck. If a step row is empty, that step might be missing an owner.

Use "X" for simple participation, or write a 1 to 2 word action if the role's contribution differs at each step. The cleaner the lanes, the easier the process is to delegate.

Part 3 · Decision Points & Escalations

List every yes/no decision in the process and what happens in each path.

#	Decision / Question	✓ If YES → next step	✗ If NO → next step	At Step
1				
2				

#	Decision / Question	✓ If YES → next step	✗ If NO → next step	At Step
3				
4				
5				

HOW TO FILL THIS OUT

A real decision point is a place where the process can branch. "Did the client sign?" "Is the invoice over \$5K?" If the answer is always the same, it's not a decision, it's a rule. Move it into Notes/Exceptions in your SOP instead.

For each decision, name the step where it happens and what each path looks like. "If YES, proceed to Step 5. If NO, escalate to Manager and pause." Vague paths are where processes break.

Part 4 · Notes, Bottlenecks & Improvement Ideas

 Known Bottlenecks	 Risks / Pain Points	 Improvement Ideas

HOW TO FILL THIS OUT

Known Bottlenecks are the spots where things slow down today, the steps that pile up, the approvals that wait. Risks are what could go wrong if conditions change: turnover, volume spikes, a tool outage. Improvement Ideas are the future state, what you'd build if you had a focused week.

Don't try to solve everything in this section. The point is to capture, not fix. The fixes go in your CLEAR framework or your operations roadmap once you've named what's actually broken.

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