

B2B Workflow Worksheet

Workflow scope

Complete once per workflow. Use a separate copy for the proposed process.

1. Workflow name and version

2. Map type and review date

Current or proposed; reviewed on

3. Business outcome and object being tracked

4. Starting event and successful endpoint

5. **Alternative endpoints and excluded processes**

6. **Workflow owner and participating roles**

7. **Systems and sources of truth**

Identify which system owns each important record or value.

8. **Evidence and unresolved assumptions**

Link observations, records, interviews, and questions.

State record

Duplicate this page for each state. Use IDs such as S01 and S02.

9. State ID and name

10. Observable definition

What is true while the item is in this state?

11. Entry conditions and required evidence

12. Current work owner and assignment rule

Include shared-queue responsibility and absence coverage.

13. **Permitted actions and decision authority**

Who can act, and with what permissions?

14. **Blockers and independent status dimensions**

For example priority, approval status, or supplier readiness.

15. **Waiting rule and escalation**

Enter the agreed threshold and escalation owner, or mark as unknown.

16. **Outgoing transitions and endpoint meaning**

List transition IDs. If terminal, state whether it was successful, rejected, or canceled.

Transition and handoff record

Duplicate this page for each transition. Link to the state and exception IDs.

17. Transition ID and from and to states

18. Trigger and authorized actor

19. Prerequisites and validation rules

20. Action and data changed or transferred

Include the version, attachments, decisions, and context needed next.

21. **Sending owner and receiving owner**

Who remains responsible until acceptance?

22. **Transfer mechanism and acceptance signal**

Distinguish notification, receipt, assignment, and completion.

23. **User confirmation and audit evidence**

What is displayed and recorded, and in which system?

24. **Waiting time and escalation**

Enter the agreed rule or mark as unknown.

25. **Failure and return paths**

Reference exception IDs and recovery or return states.

Exception record

Duplicate this page for each relevant exception. Include rare failures with serious consequences.

26. Exception ID and affected state or transition

27. Trigger and detection signal

How do the system and people know something is wrong?

28. Frequency and impact

Label observations, estimates, and unknowns separately.

29. **User explanation and blocked actions**

30. **Recovery owner and authority**

Include escalation if that owner cannot resolve the issue.

31. **Recovery steps and information preserved**

32. **Retry safeguards and downstream consequences**

Consider duplicates, uncertain completion, partial results, and stale approvals.

33. **Resume state or alternative endpoint**

What confirms recovery, cancellation, rejection, or completion?

Redesign decision and validation

Duplicate for each finding. Maintain traceability from evidence to a testable change.

34. Finding and evidence references

35. Affected roles and consequence

36. Proposed change and decision owner

Separate interface changes from business-rule and staffing decisions.

37. **Dependencies and open questions**

38. **Acceptance criteria**

Describe observable behavior, permissions, and system confirmation.

39. **Validation scenarios**

Include a routine case and relevant exceptions or recovery paths.

40. **Measure and baseline**

Define start and end events, segment, data source, and review owner. Mark missing data.

41. **Priority and rationale**

42. **Reviewed by and date**

Confirm operational rules, technical behavior, and user understanding.
