

# Workflow Mapping Template – Professional Services

*Map your core workflows end-to-end before you buy or build anything. The friction column is where your roadmap lives.*

Every professional services business runs on three to five core workflows. Onboarding. Revenue. Expenses. Service delivery. That is the whole business in four lanes. If your systems do not support these workflows end-to-end, they are not aligned. They are just sitting next to each other.

Use this template to walk each workflow step by step. For every step: what happens, which system or tool runs it, who owns it, and where the friction is. The friction column is the most important column. That is where your next roadmap comes from.

## How to use this template

- Pick one workflow at a time. Do not try to map all four in one sitting. Each one takes about 45 minutes done well.
- Walk the steps with the people who actually do the work. Not just the manager. The senior associate who lives the day-to-day will surface friction the manager does not see.
- Write down the system or tool even if the answer is “email” or “spreadsheet on someone’s desktop.” Especially then. That is the diagnosis.
- In the friction column, be specific. “Slow” is not friction. “Waits 2 to 4 days for partner approval in email, no visibility into where it sits” is friction.
- When you finish a workflow, look at the friction column from top to bottom. The pattern that emerges is your roadmap.

## Worked example: Client onboarding

Here is a fully filled-in example so you can see the level of detail that makes this useful. Note the friction column. That is where the decisions get made.

What happens	Which system or tool	Who owns this step	Friction or gap
Prospect signs proposal	PandaDoc / DocuSign /etc.	Account exec	None
Account exec emails operations to set up new client	Email	Account exec	Email is the handoff. No system trail.
Operations creates client record	Manual entry into CRM, then again in BC	Operations coordinator	Double entry. Same data, two systems. Errors weekly.

What happens	Which system or tool	Who owns this step	Friction or gap
Operations assigns delivery lead	Teams message	Operations coordinator	No record of assignment in the system. New hires cannot see who owns what.
Delivery lead kicks off engagement plan	Word doc template, saved to OneDrive	Delivery lead	Template version drift. Three slightly different versions in circulation.
Kickoff meeting scheduled with client	Outlook	Delivery lead	None
Billing schedule created	Spreadsheet emailed to billing team	Delivery lead	Lives outside any system. Updates require emails back and forth.

*The friction pattern: a handoff that happens in email or Teams, double entry between CRM and ERP, and a billing schedule that lives in a spreadsheet. Three concrete improvements come out of this map: native CRM-to-ERP integration, automated handoff notifications with system trail, and pulling the billing schedule into the ERP as a recurring revenue setup.*

## Workflow 1: Client onboarding

Map your own client onboarding workflow below. From signed proposal to first invoice issued.

Step	What happens	Which system or tool	Who owns this step	Friction or gap
1				
2				
3				
4				
5				
6				
7				
8				

Friction summary (look at the friction column above, what patterns repeat?):

## Workflow 2: Revenue (engagement to cash)

From engagement kickoff to time captured to invoice issued to cash received. This is usually where firms find the most friction.

Step	What happens	Which system or tool	Who owns this step	Friction or gap
1				
2				
3				
4				
5				
6				
7				
8				

Friction summary:

## Workflow 3: Expenses (vendor to approval to payment)

From vendor invoice received to coded to approved to paid. The classic email-as-system workflow in most firms.

Step	What happens	Which system or tool	Who owns this step	Friction or gap
1				
2				
3				
4				
5				
6				
7				
8				

Friction summary:

### Workflow 4: Service delivery (kickoff to completion)

The actual work you sell. From engagement kickoff to deliverable to client signoff. The system support here is usually the weakest.

Step	What happens	Which system or tool	Who owns this step	Friction or gap
1				
2				
3				
4				
5				
6				
7				
8				

Friction summary:

### Synthesis: your top three friction patterns

Look across all four workflows. Which friction patterns repeat across multiple workflows? Those are your highest-impact fixes. A single integration or automation that solves a pattern across three workflows is worth far more than fixing one workflow in isolation.

#	Friction pattern	Which workflows it appears in	Potential fix
1			
2			
3			