

How To Start Process Mapping for Your A/E Firm Checklist

Use this checklist to determine if your firm is ready to begin process mapping, and what steps to take before diving in, because successful process mapping starts long before the first workflow is documented. It begins with alignment, awareness, and a culture prepared for change.

To ensure success, you should be able to check **at least 3 out of 5 boxes in each section** before moving on.

Section 1: Leadership Alignment

Is your leadership team ready to support this initiative from the top down?

Firm leadership understands the value of operational clarity and systematized workflows.

We've discussed the business case for process mapping internally.

Leaders are aligned on the need to improve consistency and efficiency across departments.

We've communicated our intent to document processes to relevant team members.

Leadership has agreed to invest time and resources into this initiative.

Section 2: Understand Your Current Processes

Do you have enough knowledge about your current operations to begin?

We have a general idea of how work flows through the firm.

Some processes are informally understood, even if not yet documented.

We can identify a few clear bottlenecks or inefficiencies in our project lifecycle.

We've collected informal input from team members about common pain points.

We've attempted to diagram or sketch out workflows, even roughly, or individually.

Section 3: Build a Culture That Supports Change

Will your people embrace change and support continuous improvement?

Team members are generally open to new ways of working.

We've identified individuals who are excited about this and can act as internal champions.

Our culture encourages collaboration and feedback, especially on operational topics.

We've set aside time and budget this year for operational improvements.

We've clearly communicated that this will be a learning process—and perfection isn't the goal.

Section 4: Begin the Mapping Process

Do you have the foundation and structure in place to start mapping?

We've created or plan to create a high-level map of the firm, including major departments.

We've identified which departments will benefit most from process mapping.

We've asked senior leaders to reflect on their team's workflows and pain points.

We've invited feedback from staff within each prioritized department.

We've scheduled a kickoff session (60–90 minutes) to align on the firmwide map and choose the first department to map.

If you've checked at least 3 boxes in each section, your firm is ready to begin process mapping with confidence. It means your leadership and team are aligned and ready to embrace this process. If you fall short in any of the sections, work on building the foundation before embarking on this process. Making sure you and the team are ready will lead to a higher likelihood of success.