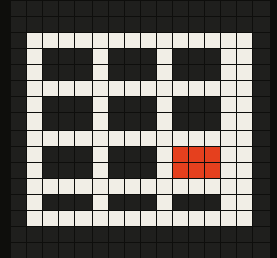


PROCESS MAP WORKSHEET

Before choosing any software, write down how the work actually happens. Follow one real job from start to finish, then the unusual cases. This map is useful whatever you decide.

variance■

[Read the full guide online ↗](#)



01 SIGNS YOU'VE OUTGROWN THE SPREADSHEET

- ☐ There are copies, and nobody is sure which is right
- ☐ Several people edit it at once, and things get lost
- ☐ Information is typed in more than once
- ☐ Mistakes are hard to spot
- ☐ There's no history of who changed what
- ☐ One person understands how it works
- ☐ Everyone can see everything
- ☐ It doesn't work well on a phone
- ☐ Customers ask questions you can't answer quickly
- ☐ Reports take a day

02 MAP ONE REAL JOB

STEP	WHAT HAPPENS	WHO	WHAT'S RECORDED, WHERE	WHAT GOES WRONG
1				
2				
3				
4				
5				
6				
7				
8				

03 THE UNUSUAL CASES

A cancellation

A refund

A partial delivery

Paying in instalments

04 YOUR OPTIONS

OPTION	FITS US?	NOTES
A better spreadsheet		
Off-the-shelf software		
No-code tool		
A custom system		

05 MOVING YOUR DATA

- ☐ Cleaned first: duplicates removed, formats made consistent
 - ☐ Decided what to bring, and archived the rest
 - ☐ Did a trial import and checked it against the spreadsheet
 - ☐ Kept the old spreadsheet, read-only
 - ☐ Set a firm date when the spreadsheet stops being updated
-