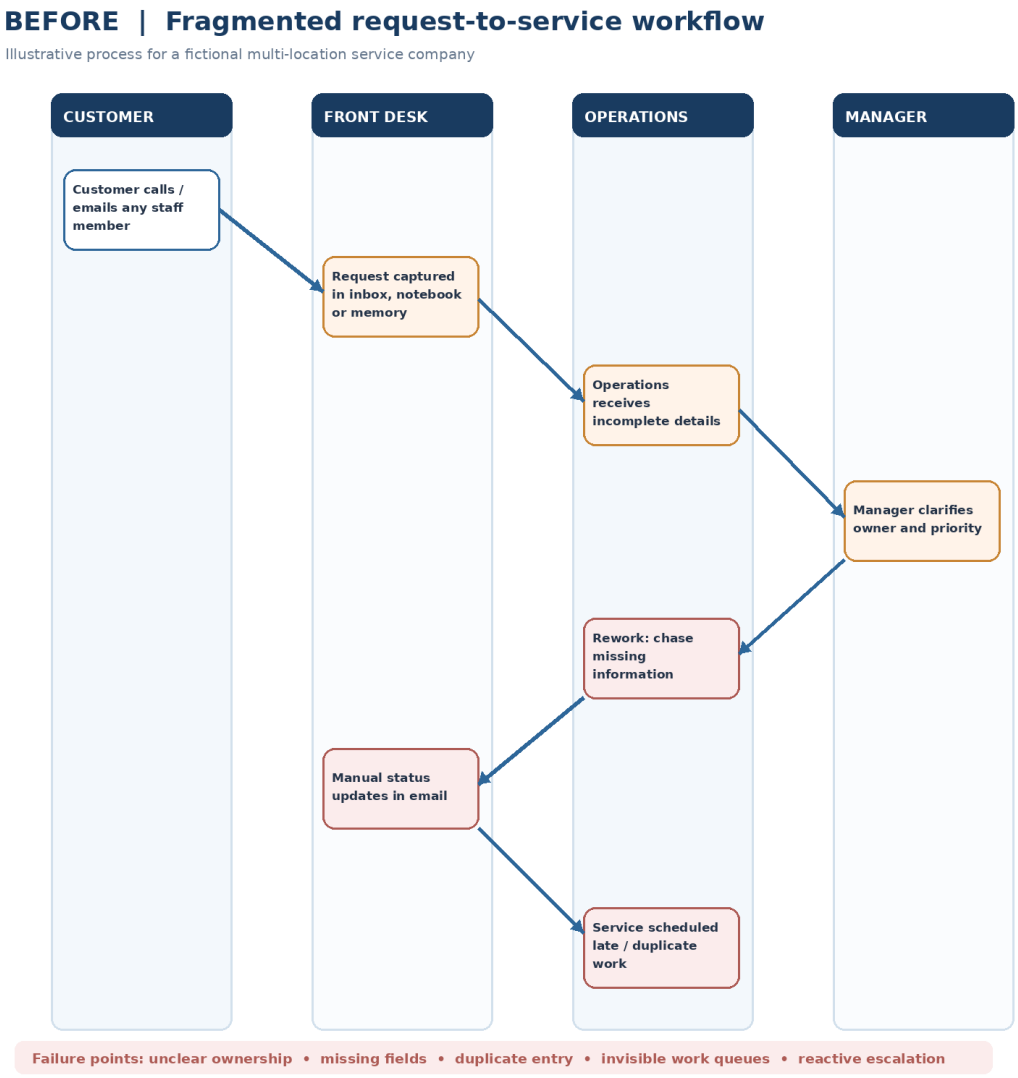
WORKFLOW REDESIGN | BEFORE & AFTER

Portfolio demonstration • Service request intake, triage and fulfilment • Blue Harbor Services (fictional)

WORKFLOW	BUSINESS SETTING	SCOPE	OBJECTIVE
Customer request to completed service	Three locations · 18 employees	Intake → assign → execute → close	Make ownership, status and exceptions visible

01 | Current-state workflow

BEFORE: Each location handles inquiries differently. Requests arrive by phone, shared inbox and direct messages; the next action depends on who receives them.



Illustrative scenario only — designed to show how conflicting channels, incomplete records and ad-hoc handoffs create rework.

02 | Workflow analysis and root causes

An effective workflow review identifies not only where delays occur, but why. The following findings are examples, not measured client results.

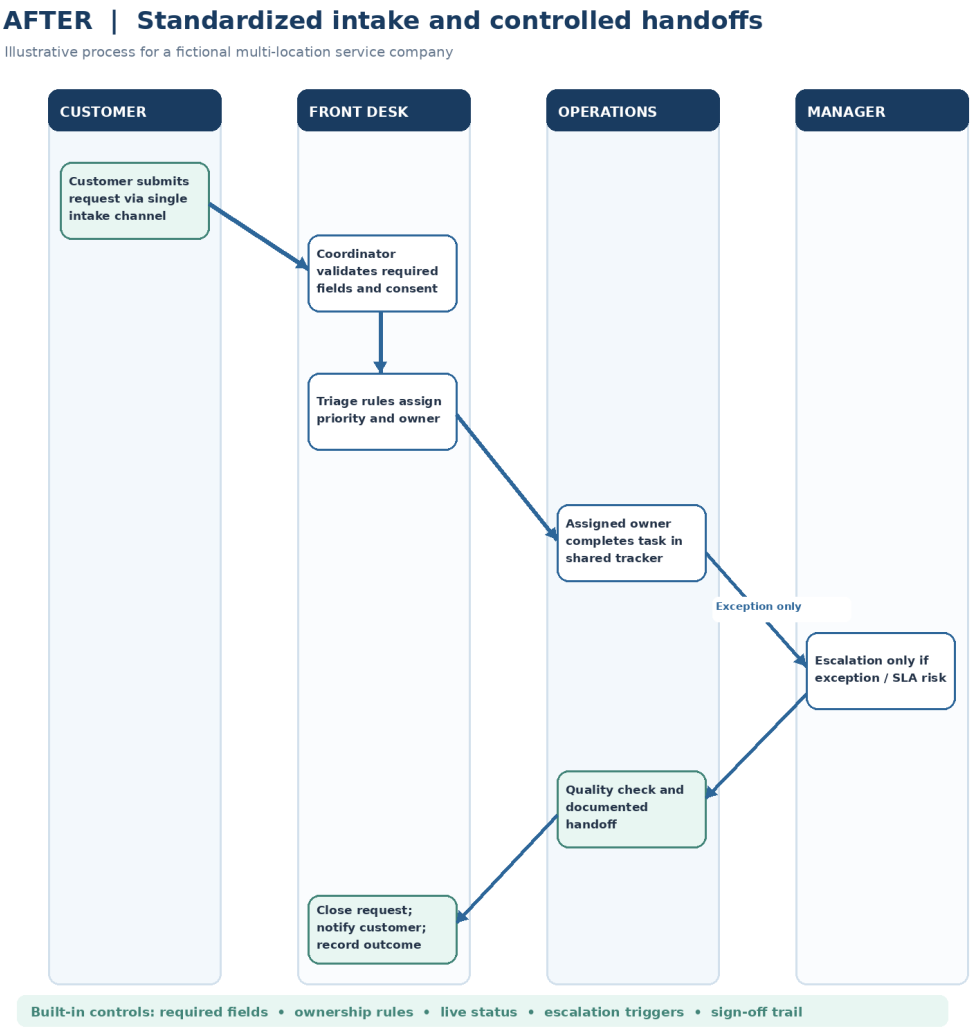
Observed issue	Root cause	Operational effect	Recommended control
Three intake channels	No designated entry point	Requests duplicated or missed	One intake form and shared queue
Missing request details	No required-field validation	Callbacks and repeated questions	Mandatory information at submission
Unclear task ownership	Assignment done verbally	Work sits unclaimed	Owner + due date required
Every urgency sounds critical	No triage definitions	Constant interruptions	P1/P2/P3 decision rules
Progress lives in email	No common status taxonomy	Managers chase updates	Live tracker with standard statuses
Exceptions resolved differently	No documented escalation path	Slow or inconsistent decisions	Decision table + escalation triggers
Completion not confirmed	No final quality gate	Incomplete records / reopenings	Closure checklist and handoff sign-off

Decision rules — triage and exception handling

If this happens…	Coordinator action	Owner / escalation
Required details missing	Set status Awaiting Information; request missing fields using standard message.	Coordinator; escalate after agreed follow-up window.
Safety, regulatory or same-day impact	Flag Priority 1; notify duty manager immediately; document instruction.	Duty manager decides response.
Routine request with complete information	Apply Priority 3; assign named owner and target date.	Operations owner.
Duplicate request found	Link to original record; close duplicate with reason.	Coordinator validates original owner.
Client changes request	Update scope, owner and date; record confirmation.	Operations owner; manager for scope changes.

03 | Future-state workflow

AFTER: A controlled entry point, clear triage rules, assigned ownership, live visibility and a documented closeout remove ambiguity without adding unnecessary handoffs.



Key redesign principles: one intake channel, one accountable owner, standard priority rules, live status tracking and documented closure.

04 | Practical implementation plan

A redesign becomes valuable when the team knows how to use it. This implementation plan ties the map to real operational controls.

Phase	Action	Deliverable	Validation
1 · Confirm	Review proposed future-state map with staff and owner.	Approved process map	Walk through 3 real scenarios
2 · Build	Create intake form, request tracker, scripts and triage guide.	Operational toolkit	Test all required fields
3 · Pilot	Run with one location / small team.	Pilot log and issues	Review weekly exceptions
4 · Roll out	Train teams using SOP and job aid; assign process owner.	Training and handoff pack	Spot-check sample requests
5 · Review	Compare baseline and new process measures.	30-day review report	Agree revisions and owners

Example control checkpoints

Checkpoint	Pass condition	If not met
Intake completeness	All mandatory fields recorded	Return to requester before assignment
Ownership	Named owner and target date present	Coordinator assigns before processing
Priority	Triage category selected and supported	Manager validates ambiguous priority
Closeout	Service outcome, confirmation and date logged	Reopen until documentation complete

Suggested success measures (targets set during pilot)

Completeness rate = complete requests ÷ total requests • Assignment time = assigned timestamp − received timestamp • Rework rate = requests requiring correction ÷ completed requests • On-time closure = completed by due date ÷ closed requests

05 | Business tool example: Request Control Tracker

A companion tracker makes the redesigned workflow actionable. This sample illustrates how a client-facing Excel workbook could bring status, ownership and follow-up into one place.

Dashboard snapshot | Illustrative data only

OPEN REQUESTS	DUE TODAY	AT RISK	OVERDUE
12	3	2	1

Example tracker view

ID	Received	Request / type	Priority	Owner	Status	Due
REQ-1042	Nov 02	New client intake	P3	Jordan	In Progress	Nov 04
REQ-1043	Nov 02	Urgent access issue	P1	Avery	Escalated	Nov 02
REQ-1044	Nov 02	Missing documents	P2	Taylor	Awaiting Info	Nov 03
REQ-1045	Nov 01	Appointment change	P3	Morgan	Ready to Close	Nov 03
REQ-1046	Oct 30	Service follow-up	P2	Jordan	At Risk	Nov 02
REQ-1047	Oct 29	Record correction	P3	Taylor	Closed	Oct 31

Behind the tracker

Tool feature	How it helps employees
Dropdown status + priority	Ensures everyone uses the same terminology.
Conditional formatting	Makes upcoming, overdue and escalated work easy to spot.
Assigned owner column	Prevents requests from sitting in a shared queue without accountability.
Age and overdue formulas	Calculates elapsed days and alerts on overdue items.
Summary KPIs	Lets a manager spot workload and bottlenecks.