Current vs. Future State Process Template

A practical tool for comparing how work happens today with the process your organization needs next

Organization / Team:	
Process or Workflow:	
Change Driver:	AI adoption / commercialization / operational improvement / scaling / other
Process Owner:	
Participants:	
Review Date:	

This template helps teams document a current workflow, design a future-state process, and identify the transition requirements needed to move from one to the other. It is useful for commercialization planning, AI adoption, operations improvement, internal administration, grant-funded growth, customer delivery, and optimization engineering preparation.

- Capture the current state honestly, including delays, workarounds, duplicate work, unclear ownership, and risk points.
- Define a future state that improves clarity, scalability, data flow, technology readiness, and measurable performance.
- Compare current and future conditions to identify practical gaps that must be resolved before implementation.
- Translate the comparison into a transition plan with owners, dependencies, metrics, and adoption support.

How to Use This Template

Complete this document with the process owner and a small working group that includes people who perform the work, manage the work, depend on the outputs, and understand relevant systems or data. For AI or optimization-related changes, include technical staff, data owners, and end users early.

1. Process Purpose and Change Context

Use this section to define why the current process is being reviewed and what the future state must support. A clear current-to-future comparison helps teams avoid vague improvement efforts and focus on practical change.

Planning Question	Current Answer	Future-State Goal
What does this process need to accomplish?		
Who depends on the process output?		
What has changed in the environment, technology, market, or funding context?		
What pain points or risks make redesign necessary?		
How does this process affect customers, partners, funders, or internal teams?		
What should be easier, faster, safer, or more scalable in the future?		
Which AI, automation, optimization, or data opportunities should be considered?		

2. Current-State Process Map

Document how the process works today. Focus on actual practice rather than how the process is supposed to work. Include informal workarounds, delays, rework, and decision points.

Step	Current Activity	Owner	Input	Output / Decision	Tool / System	Pain Point / Risk
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

3. Future-State Process Map

Design the future process around the outcomes the organization needs now. The future state should clarify roles, reduce friction, improve data flow, support technology adoption, and be realistic to implement.

Step	Future Activity	Owner	Input / Data	Output / Decision	Tool / System	Improvement Expected
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						

4. Current vs. Future Gap Analysis

Compare the current state against the desired future state. Use this table to identify the work required before implementation can succeed.

Gap Area	Current State	Future State	Required Change	Priority	Owner
Roles and decision authority					
Handoffs and approvals					
Data availability and quality					
Technology, AI, or automation enablement					
Customer, partner, or funder experience					
Compliance, privacy, security, or IP controls					
Training, documentation, and SOPs					
Metrics, reporting, and adoption tracking					

Priority Guidance

High-priority gaps are those that prevent adoption, create material risk, block customers or funders, limit scalability, or must be resolved before AI, automation, or optimization work can generate value.

5. Transition Requirements

Identify what must be prepared before the organization moves from the current process to the future state. This is where process design becomes a practical change plan.

Requirement	Needed?	Description	Responsible Party	Due / Notes
Leadership approval and sponsorship				
Stakeholder communication plan				
Process documentation or SOP update				
Training or onboarding materials				
Technology configuration or integration				
Data cleanup, migration, or dashboard setup				
Security, privacy, compliance, or IP review				
Pilot test or phased rollout plan				
Performance metrics and feedback loop				

6. Implementation and Adoption Action Plan

List the practical actions needed to move from the current state to the future state. Keep each action specific enough that progress can be tracked.

Action	Owner	Start	Due	Dependency	Success Indicator	Status / Notes

Workshop Discussion Questions

- Which current-state steps add value, and which steps exist mainly because of habit or workaround?
- Where does the process rely too heavily on one person, manual tracking, or informal communication?
- What should be simplified before AI, automation, or other technology is introduced?
- What new risks are introduced by the future-state process, and how should they be managed?
- How will the team know whether the future-state process has actually been adopted?
- What should be piloted first before a broader rollout?

ScienceDocs Process Mapping, Change Management, AI, and Optimization Support

ScienceDocs helps startups, research teams, and innovation-focused organizations compare current and future workflows, redesign processes, prepare for AI adoption, support commercialization, and build practical implementation plans. Ready to move from current-state friction to a clearer future-state process? Contact ScienceDocs to discuss workflow mapping, process redesign, change management, AI implementation, or optimization engineering support.