Process Redesign Worksheet

A practical tool for turning workflow problems into clearer, scalable, and measurable operating processes

Organization / Team:	
Process Being Redesigned:	
Process Owner:	
Participants:	
Workshop / Review Date:	

This worksheet helps teams redesign a process after identifying workflow friction, bottlenecks, role confusion, technology gaps, or scaling limitations. It can be used for commercialization planning, AI adoption, operations improvement, grant-funded growth, customer delivery, internal administration, or optimization engineering preparation.

- Clarify the reason for redesign before proposing new tools or structures.
- Prioritize the pain points with the greatest impact on performance, adoption, cost, quality, or scale.
- Define a future-state process that clarifies ownership, handoffs, data, and decisions.
- Create an implementation plan that includes people, systems, metrics, and risk controls.

How to Use This Worksheet

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

1. Process Redesign Summary

Use this section to define why the process needs redesign and what the redesigned process must accomplish. This worksheet is most useful when the current process has already been mapped or is at least well understood by the team.

Planning Question	Current Understanding	Notes / Evidence Needed
What process is being redesigned?		
Why does this process need to change now?		
What business, commercialization, AI, or operational goal does this support?		
What problem should be solved first?		
Who is affected by the redesigned process?		
What must not be disrupted during the transition?		
What constraints must the redesign respect?		
What does success look like in 30, 60, and 90 days?		

2. Pain Point and Opportunity Prioritization

Identify where the process creates the most friction. Prioritize problems that are frequent, costly, visible to customers or funders, difficult to scale, or likely to block AI adoption or operational improvement.

Pain Point / Opportunity	Evidence	Impact	Frequency	Fix Difficulty	Priority
Delays or waiting time					
Duplicated work or re-entry of information					
Unclear handoffs or ownership					
Too much manual review or approval					
Data quality, access, or reporting gaps					
Errors, rework, or inconsistent outputs					
Poor customer, partner, or internal experience					
Compliance, security, or documentation risk					
Scalability limitation as volume increases					

Suggested Scoring

For Impact, Frequency, and Fix Difficulty, use Low / Medium / High or a 1-5 score. High-impact, high-frequency issues that are realistic to improve should move to the top of the redesign plan.

3. Redesign Principles and Requirements

Define the rules that should guide the future process. These principles help prevent the redesign from becoming a collection of disconnected fixes.

Design Principle	Why It Matters	Requirement / Standard	Owner
Simplify before automating			
Clarify ownership and decision authority			
Reduce avoidable handoffs			
Use a single source of truth for key information			
Design for scale, not just the current volume			
Protect quality, compliance, privacy, and IP			
Make progress visible with useful metrics			
Support adoption with training and documentation			

4. Future-State Process Design

Use this worksheet to describe the redesigned process. Focus on the future state that can realistically be implemented, measured, and improved over time.

Future Step / Phase	Key Activity	Owner	Input / Data Needed	Output / Decision	Tool / System
1					
2					
3					
4					
5					
6					
7					
8					
9					

5. Implementation Impact Review

A redesigned process affects people, systems, timing, data, training, and governance. Use this section to identify what must be addressed before implementation begins.

Impact Area	What Will Change?	Who Is Affected?	Support Needed	Risk / Mitigation
Roles and responsibilities				
Leadership decisions and approvals				
Technology, AI, or automation tools				
Data collection, reporting, or dashboards				
Customer, funder, investor, or partner communication				
Training, documentation, and SOPs				
Compliance, security, privacy, or IP controls				
Performance metrics and adoption tracking				

6. Process Redesign Action Plan

Translate the redesign into a practical plan. Keep early actions realistic so the team can build confidence and momentum before addressing more complex changes.

Action	Owner	Priority	Start	Due	Success Metric	Status / Notes

Workshop Discussion Questions

- What would we remove from the process if we were designing it from scratch today?
- Which steps exist because of historical habit rather than current need?
- Where could AI, automation, analytics, or optimization engineering create measurable value?
- Which changes would make the process easier for customers, users, funders, or partners?
- What risks must be controlled before the redesigned process goes live?
- How will we know the redesigned process is being adopted and producing results?

ScienceDocs Process Redesign, AI, and Optimization Support

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