PROCESS: HOW A JOB REALLY GETS DONE

# Job map

Map one customer job from first call to finished work, and find where the details get lost.

## The work was done.
## The one thing the customer cared about was missed.

### What you'll end up with

One real job mapped step by step, as a table and as a drawing, with every handover marked (each point where the job passes from one person to the next), the detail that went missing and where it dropped, and a decision on where details like it are kept from now on.

### How to do it

Print it and work through the six steps in order, with a pen. Pick a job or client project you finished recently and walk it as it really happened. Do it with the people who did the work if you can, because they saw things you didn't.

WHAT'S INSIDE

1 The detail that got lost

2 Walk the job

3 Mark every handover

4 Find the lost detail

5 One place for the details

6 The first change, and who does it

## 1 The detail that got lost

Good work, an unhappy customer, and nobody quite sure why.

The whole garden bed was cleaned up, and the customer was still unhappy. Walt Thiessen gave that example when he joined me on Episode 93 of The ATP Shift, the podcast I host for All The Power (ATP). I'm Roy Castleman. Walt was describing what used to happen at Garden Rescuers, his gardening service. A customer wanted four beds done and cared most about one of them, the third, because it held a prized geranium, a gift from a grandmother, that was disappearing into the weeds. When that one detail didn't reach the people doing the work, they cleaned up the whole of that bed and the geranium wasn't properly cared for. A job done well still left an unhappy customer.

Garden Rescuers already had a process. The estimator would visit and make notes bed by bed on what each one needed, the weeding, the edging, the mulch. The notes were written up as an estimate and sent by email, the customer signed it off, a payment was collected up front, and only then was the team booked to do the work.

> *"All kinds of little things would fall through the cracks." Walt Thiessen, on Episode 93*

Walt said theirs was the most successful gardening service for miles around, and that this kind of thing was still wreaking havoc inside it.

Walt went on to have AI build an app for the business, which step 5 comes back to. I said in that conversation that you can't automate work, or give it to AI, until you know what you have. The first question is what you are doing now. This worksheet answers it for one job, and in the last step you decide which part of that job stays with a person and which could go to AI.

A job here means any piece of work for a customer or client, from the first contact to the finished work. It could be a repair, a set of accounts or a campaign.

**The job we are mapping (a real one, finished recently)** _____

**Who the customer was, and what they asked for**

**Why we picked this one**

> Map the job as it happened. Where it differs from how it is supposed to happen is what you are looking for.

## 2 Walk the job

From the first call to the finished work, in the order it really happened.

Write one row for every step, however small, starting with the first call or enquiry and ending with the finished work. For each step write who did it, what they needed to know to do it properly, and where that information was at the time: in someone's head, on paper, in a message or in a system. If your job has fewer steps, leave rows empty. If it has more, carry on over the page or on a spare sheet.

| STEP | WHO DID IT | WHAT THEY NEEDED TO KNOW | WHERE IT WAS KEPT |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Now draw it. One box for each step, in order, with the name of the person who did it inside, and an arrow from each box to the next.

MY JOB, FROM FIRST CALL TO FINISHED WORK

**The step where the job waited longest** _____

**The step we had forgotten until we wrote this down** _____

## 3 Mark every handover

Each time the job moves from one person to another, something can be left behind.

Walt's firm is small. He runs it, one person answers the phone and does the scheduling, one does the estimating, and a team of gardeners does the work. He said they all need access to the same flow of information. Every time the job passes from one of them to the next is a handover, or a handoff if you are in the US.

I told him how this goes wrong in small businesses, and that I have been guilty of it myself. You tell somebody to go and do something, you don't explain it very well, they take what they want from it and do it their own way, and then the next person learns it from them.

Go back to your drawing in step 2 and put a cross on every arrow where the job passed from one person to another. Fill in one row here for each. Under "how", write whether it was said, written down, sent as a message or put in a system.

| FROM (NAME AND ROLE) | TO (NAME AND ROLE) | HOW | WHAT WAS PASSED ON |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Step 4 compares this with what the customer asked for. That shows what was left behind.

**The handover we are least sure about, and why**

## 4 Find the lost detail

The geranium question: what did this customer care about most, and who knew?

Answer these for the job on your map. Circle Y or N. Each one is written so that a Y means a detail went missing, or nearly did.

| | |
|---|---|
| Did the person doing the work start without knowing what the customer cared about most? | **Y / N** |
| Was the customer asked for the same information more than once? | **Y / N** |
| Did anyone have to stop and phone someone to find something out? | **Y / N** |
| Was anything ordered, booked or done twice? | **Y / N** |
| Did the customer have to chase us at any point? | **Y / N** |
| Would we struggle to show the customer the work was done the way they asked? | **Y / N** |

Each Y points to a step or a handover on your map where information didn't arrive. Pick the one that mattered most to the customer and trace it back. If every answer is N, look for the nearest miss on this job, or map a job that went wrong.

Two of these come from Walt's story. He said they often had to order mulch twice because the first order was the wrong amount. His gardeners now take a photo when the work is done, so when a customer asks about the geranium the answer is a picture.

**The detail that was lost, or nearly lost**

**Where on the map it dropped (which step or handover)**

**What it cost the customer, and what it cost us**

**Who knew it, and who needed to know**

> One lost detail is enough to start with. Find where it dropped before you look for the next.

## 5 One place for the details

Decide where details are kept and who looks at them, before you choose any tool.

Walt's answer was to pull all those little details into one place where the whole team could see them and add to them. For his firm that became an app: the estimator's photos and write-up sit with the job, the write-up is produced by AI, the gardeners can see what needs doing, and they report back when it is done. He said it took the paperwork away from the team so they could do what they were good at, which was gardening.

You don't need an app to begin. A shared document, or one page kept with each job, is enough. The job you mapped showed you what goes missing, and this page is for the jobs that come next.

**Where the details of every job will be kept from now on (one place everyone can reach)**

**Who writes down what the customer cares about most, and when**

**Who reads it before the work starts**

**How we will show the customer the work was done the way they asked**

**Who checks, on each job, that the details were written down**

## 6 The first change, and who does it

One change, at the place your detail dropped.

Go back to the step or handover where your detail dropped in step 4. Write the one change that would have got the detail to the person who needed it. It might be a line added to a form, a question asked on the first call, or a photo taken before the work starts.

**The one change we will make first**

**The next job we will try it on**

**A person, an AI agent, or both**

Whatever your change is, someone has to record the detail at that step on every job from now on. The last decision is who. An AI agent is an AI tool set up to do one task. At Walt's firm, AI produces the written summary of each job. Tick one.

- ☐ **A person.** It needs judgement, or a conversation with the customer
- ☐ **An agent.** It follows a clear rule every time. Next, write that rule out in full and name the person who looks at what the agent produces
- ☐ **Both.** The agent drafts the record and gathers the notes and photos, and a named person checks it before the work starts

**If you ticked an agent, or both: the rule it follows, and who checks**

> Whichever you tick, you still design how the job runs. You decide what good work is, and you check that the job was done that way.

THIS WEEK

**Map one finished job with the people who did it, then make the one change you wrote down in step 6.**

FROM EPISODE 93 OF THE ATP SHIFT PODCAST · ALLTHEPOWER.CO.UK/JOB-MAP