**Wrike Process Mapping Template**

This guide helps you translate your processes into templates that you can use over and over again.

**Create Templates For**

* Work that you repeat on a regular basis
* Bigger projects and assignments that you do often (or even just more than once)
* Complex processes with specific steps or instructions that need to be passed on or followed

**Get Started**

Identify a single process and then start using the table on page 2. From the table:

1. Add all of the steps required to complete the process from start to finish. Tip! Think about how you would explain all of the steps to a five year old, listing out everything that needs to be done.
2. Describe the output generated by each step in the process e.g. information, materials, decisions, deliverables, reports, emails, etc.
3. Specify the person responsible for doing the work.

**Step 1: Process Mapping Table**

*List out steps required to complete a process. Add additional rows as needed.*

*We put in a few examples, just delete them to get started.*

*When you’re done continue to Step 2.*

|  |  |  |
| --- | --- | --- |
| **Step** | **Who is Responsible?** | **Output** |
| *Example* Collect content for newsletter | Joe Smith | Topics to be included in newsletter |
| *Example* Write newsletter content | Zoey Oh | Final draft of newsletter |
| *Example* Design newsletter content | Design Team | Add graphics to newsletter |
| *Example* Send newsletter content | Joe Smith | Send monthly newsletter |
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**Step 2: Add to Wrike**

*Next translate data from the table to Wrike.*

1. In Wrike, create a new Folder named “Templates”.
2. Within your “Templates” Folder, create another new Folder or Project. This will become your template, so we recommend giving it a descriptive name. For example: Book Launch Template.
3. Create a task for each step listed in the table above.
   1. Add the responsible person as the task assignee.
   2. Add the “output” as the task description.
   3. Add any additional task details which will help when carrying out the project. If you’re using [Custom Fields](https://help.wrike.com/hc/en-us/articles/209603049-Custom-Fields) you can fill in data there too.
4. Change the statuses of the template's tasks to deferred. This will help keep your Workspace clean and when you duplicate a Folder template, the statuses of all copied tasks are automatically switched to active.

Your template is [ready to use](https://help.wrike.com/hc/en-us/articles/209603149-Templates#folder) whenever you need it.