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AES SYSTEMS THINKING FRAMEWORK THE SCALE WORKBOOK

Turn one recurring workflow from owner-driven effort into a visible, dependable system.

SMES & MSMES

One workflow | Five lenses | One 30-day improvement

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01

EFFORT-DRIVEN VS SYSTEM-DRIVEN GROWTH

Choose one recurring workflow; do not turn this into a whole-organization review.

In a growing business, effort can hide a weak system for a long time. Owners rescue routine work, employees wait for approval, knowledge stays in one person's head and growth adds errors faster than capacity. SCALE helps the team examine one workflow as it really operates, understand what the friction is communicating and improve the root cause before adding people or technology.

EFFORT-DRIVEN GROWTH

Results depend on extra effort, memory, personal rescue and repeated chasing. Growth adds strain because the workflow itself is not dependable.

- Quality varies according to who performs the work.
- Overtime, chasing and firefighting are treated as normal.
- The owner or a senior manager repeatedly rescues routine work.
- Employees wait for one person to approve decisions that could be delegated.
- People create individual workarounds because the method is unclear or impractical.
- The same information is captured repeatedly in messages, notebooks and spreadsheets.

SYSTEM-DRIVEN GROWTH

The workflow makes the result repeatable: ownership, decisions, information, controls and learning work together even when pressure increases.

- The expected result and completion standard are clear.
- One owner and a capable backup can move the work to completion.
- Routine decisions happen within understood limits.
- One reliable record shows status, next action and evidence.
- Delays, rework, complaints and exceptions are reviewed by cause.
- The method is documented and works before more people or technology are added.

SELECT THE WORKFLOW Choose the process causing the most repeated delay, rework, complaint, dependency or confusion.

ORGANIZATION

REVIEWER / TEAM

REVIEW DATE

CURRENT WORKFLOW OWNER

WORKFLOW SELECTED

Name one request-to-result process.

RECURRING PAIN

What keeps happening, and who feels the effect?

START EVENT

COMPLETED RESULT



RUNNING EXAMPLE

Business supplies: purchase request to supplier payment

02

REVIEW THE WORKFLOW THROUGH SCALE

Write one evidence-based observation for each lens.

S

SEE THE WHOLE WORKFLOW

Map the work from request to result, including the informal steps.

PRACTICAL QUESTION

What actually happens, not what the policy says should happen?

Use: What event starts the work and what result proves it is finished? | List the real steps, including messages, chasing and owner intervention. | Where does work wait, return, get repeated or change...

YOUR OBSERVATION / EVIDENCE

C

CLARIFY OUTCOMES AND OWNERSHIP

Define the expected result, owner, backup, decision rights, and escalation limits.

PRACTICAL QUESTION

Who owns the result and what can they decide without waiting?

Use: Who owns the complete result, not just one task? | Who is the capable backup? | What routine decisions can staff make without the owner?

YOUR OBSERVATION / EVIDENCE

A

ALIGN PEOPLE, PROCESS, INFORMATION, AND TOOLS

Remove conflicting instructions, duplicate records, unnecessary handovers, and tool gaps.

PRACTICAL QUESTION

Do the roles, workflow, data, and technology support the same outcome?

Use: Where do roles or instructions conflict? | Which information is entered more than once? | Which handoff or tool adds effort without useful control?

YOUR OBSERVATION / EVIDENCE

L

LEARN FROM FEEDBACK AND EXCEPTIONS

Review delays, rework, complaints, quality failures, and unusual cases.

PRACTICAL QUESTION

What is the process teaching us, and what should change?

Use: Which delay, error, complaint or exception keeps returning? | What does the pattern reveal about the process? | What small change can be tested and measured?

YOUR OBSERVATION / EVIDENCE

E

EXPAND ONLY AFTER THE CORE WORKS

Standardize the improved method, train the team, then add volume, people, branches, or technology.

PRACTICAL QUESTION

Are we scaling a reliable process or multiplying confusion?

Use: Has the improved route worked on real requests? | Can the backup follow it without relying on memory? | What must stay reliable before the business adds volume or tools?

YOUR OBSERVATION / EVIDENCE

03

TEST DEPENDENCY, AUTHORITY AND RELIABILITY

A strong average does not cancel a critical dependency.

DEPENDENCY RED FLAGS

- ☐ The workflow stops when the owner or one experienced employee is absent.
- ☐ Passwords, supplier contacts, files or approval evidence depend on one person.
- ☐ Routine exceptions repeatedly escalate to the owner.
- ☐ There is no capable and authorized backup for a critical step.
- ☐ Status exists only in private messages, memory or one person's notebook.
- ☐ One person requests, approves, receives and records the same purchase without an appropriate check.

DECISION-RIGHTS CHECK

- Who owns the result from request to confirmed payment?
- What may staff approve within an agreed budget or value limit?
- Which known exceptions may be resolved without the owner?
- What must be escalated, to whom and within what time?

END-TO-END OWNER

ROUTINE AUTHORITY / LIMIT

BACKUP AND ESCALATION TRIGGER

RATE THE CURRENT WORKFLOW: 1 = FRAGILE, 5 = SYSTEM-DRIVEN

Use consistent evidence, not the best recent case.

VISIBILITY

1: The route and status are known only by asking the owner or searching messages. 5: The steps, owner, age, next action and completion evidence are visible.

1

2

3

4

5

CONSISTENCY

1: The route and result change according to the person doing the work. 5: A simple standard route works for routine cases, with known exceptions.

1

2

3

4

5

OWNERSHIP

1: Everyone helps, but nobody owns the result or has authority to finish it. 5: An owner, backup, decision limits and escalation route are understood.

1

2

3

4

5

RESILIENCE

1: Absence, lost access or workload peaks stop the workflow. 5: Backups, accessible records and continuity steps keep priority work moving.

1

2

3

4

5

LEARNING

1: Problems are fixed individually and keep returning. 5: The team reviews evidence, tests one change and updates the method.

1

2

3

4

5

TOTAL / 25

AVERAGE / 5

INTERPRETATION

21-25 System-driven / scale-ready

17-20 Generally reliable

13-16 Developing system

9-12 Effort-dependent

5-8 Fragile / critical

WHAT THE AVERAGE MEANS

The average is the total divided by five. It shows the typical reliability of this workflow across the five factors: 1.0 is person-dependent and fragile; 3.0 is developing; 5.0 is consistently system-driven.

RED-FLAG OVERRIDE

If any red flag is selected, act on that exposure even when the total score is high. The interpretation will display + RED FLAG.

04

CHOOSE ONE 30-DAY IMPROVEMENT

Use a controlled experiment: one root cause, one owner, one measure and one review date.

WHAT TO PUT IN THESE FIELDS

- Focus: the recurring failure or root cause to improve.
- Change: the smallest practical system change to test.
- Measure: the number or evidence that will show whether it worked.
- Review: adopt, adjust or stop based on Day 30 evidence.

IMPROVEMENT FOCUS / ROOT CAUSE

OWNER AND BACKUP

CHANGE / EXPERIMENT

What will be different in the workflow?

BASELINE

Current evidence

30-DAY TARGET

Desired evidence

MEASURE AND DATA SOURCE

SECTOR EXAMPLE

Focus: Reduce routine purchase delays caused by owner approval and incomplete information.

Change: Pilot one complete request form, a simple approval limit and one shared status log for routine purchases.

Measure: Median days from complete request to order, requests returned for missing information and routine requests needing owner intervention.

WEEKLY CHECKPOINTS

WEEK 1

WEEK 2

WEEK 3

WEEK 4

DAY 30 EVIDENCE AND DECISION

Adopt, adjust or stop - and why.

SAVE YOUR WORK, THEN CHOOSE THE NEXT STEP

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SAVE AND SEND TO AES

ACCESS THE PROFESSIONAL EDITION