



The Hidden Work Assessment

Discover the Invisible Inefficiencies and Untapped Innovations in Your Organization

Why Hidden Work Matters

Every organization has two operating systems: the one on paper and the one that actually gets things done. The gap between these systems represents both your biggest risks and your greatest opportunities.

This assessment reveals:

- **Shadow workflows** that bypass official processes
- **Tacit expertise** that exists only in people's heads
- **Innovation pockets** where exceptional performance happens quietly
- **Automation opportunities** that traditional analysis misses
- **Knowledge vulnerabilities** that threaten business continuity

Time Required: 20-30 minutes

Best Completed By: Department heads, operations leaders, or anyone with 3+ years in current role

How to Conduct the Assessment?

For each question, select the response that best reflects your organization's reality. Be honest – this assessment is most valuable when it captures what actually happens, not what should happen.

Scoring Guide:

- **A** - 4 points (Highly visible/well-managed)



- **B** - 3 points (Mostly visible/adequately managed)
- **C** - 2 points (Partially visible/inconsistently managed)
- **D** - 1 point (Hidden/poorly managed)

1: Detecting Shadow Workflow

Identifying the unofficial processes that keep your organization running

Q1: When urgent requests come in, how often do people follow the official approval process?

- A)** Always – our formal processes are designed for urgency, and people stick to them
- B)** Usually – people follow formal processes but may skip non-critical steps when time is tight
- C)** Sometimes – there's an understood "fast track" that bypasses several formal steps
- D)** Rarely – everyone knows the "real way" to get things done quickly, and it's completely different from the official process

Your Score: _____

Q2: How consistent are the tools and methods your team uses for the same type of work?

- A)** Completely standardized – everyone uses the same tools and follows identical workflows
- B)** Mostly standardized – core tools are consistent, but people may have personal variations
- C)** Somewhat varied – people use different tools but achieve similar results
- D)** Highly varied – each person has developed their own toolkit and approach

Your Score: _____



Q3: When new team members ask "How do we really do this?" how often does the answer match the training manual?

- A)** Always – our documentation accurately reflects reality
- B)** Usually – minor variations but fundamentally accurate
- C)** Sometimes – significant gaps between documentation and practice
- D)** Rarely – we joke that the real training happens after the official training

Your Score: _____

Q4: How often do people create their own tracking systems (spreadsheets, personal databases, etc.) because the official systems don't meet their needs?

- A)** Never – our systems handle everything people need
- B)** Rarely – occasional personal tools for convenience
- C)** Sometimes – several people have created supplementary systems
- D)** Frequently – most people have personal systems they rely on more than official ones

Your Score: _____

Q5: When processes fail or break down, how do people typically respond?

- A)** Follow established escalation procedures and wait for official resolution
- B)** Try standard troubleshooting while following escalation procedures
- C)** Develop temporary workarounds while pursuing official solutions
- D)** Immediately implement workarounds that often become permanent solutions

Your Score: _____

Section 1 Total: _____/20

2: Analyzing the Visibility of Expertise



Assessing how well you understand and leverage individual expertise

Q6: When someone is unexpectedly absent, how easily can someone else handle their responsibilities?

- A)** Seamlessly – all knowledge and processes are well-documented and shared
- B)** With minor adjustments – some learning curve but manageable
- C)** With significant effort – requires substantial support and learning
- D)** With great difficulty – their unique knowledge creates major disruptions

Your Score: _____

Q7: How often do you discover that your best performers do things completely differently from standard procedures?

- A)** Never – high performers follow processes, just more efficiently
- B)** Rarely – minor variations that don't significantly impact approach
- C)** Sometimes – notable differences that contribute to their success
- D)** Frequently – our best people have essentially created their own methods

Your Score: _____

Q8: When customers or stakeholders request specific team members, how well do you understand why?

- A)** Completely – we know exactly what makes each person valuable and can replicate it
- B)** Mostly – we understand the general reasons and have some documentation
- C)** Partially – we know they're preferred but not exactly why
- D)** Not at all – it seems based on personal relationships or "magic"

Your Score: _____



Q9: How confident are you that your training programs capture what your best performers actually do?

- A) Very confident – training is based on analysis of top performer behaviors
- B) Somewhat confident – training covers most of what good performers do
- C) Not very confident – training covers basics but misses nuanced expertise
- D) Not confident at all – training and reality are quite different

Your Score: _____

Q10: When making hiring decisions, how well can you articulate what separates good performers from great ones?

- A) Very well – we have clear, specific criteria based on observed behaviors
- B) Pretty well – we know the general qualities that matter
- C) Somewhat – we have a sense but struggle to define it precisely
- D) Poorly – we know great performance when we see it, but can't define it

Your Score: _____

Section 2 Total: _____/20

3: Discovering Innovation

Identifying where breakthrough improvements are happening organically

Q11: How often do you discover that teams have independently solved the same problem in different ways?

- A) Never – we have consistent approaches across teams
- B) Rarely – isolated instances with minor variations
- C) Sometimes – occasional parallel innovations
- D) Frequently – teams regularly reinvent solutions independently

Your Score: _____



Q12: When you investigate exceptional performance results, how often do you find undocumented methods or approaches?

- A)** Never – exceptional results come from better execution of standard methods
- B)** Rarely – minor undocumented optimizations
- C)** Sometimes – significant undocumented innovations
- D)** Usually – our best results almost always involve methods we haven't captured

Your Score: _____

Q13: How systematically do you capture and share innovations that emerge from the field?

- A)** Very systematically – we have formal processes for identifying and scaling innovations
- B)** Somewhat systematically – we try to capture good ideas but may miss some
- C)** Inconsistently – some innovations get shared, many don't
- D)** Rarely – innovations stay with the people who created them

Your Score: _____

Q14: When people say "I found a better way to do this," how often does it become standard practice?

- A)** Almost always – we actively test and implement good ideas
- B)** Usually – good ideas get adopted after evaluation
- C)** Sometimes – depends on timing and politics
- D)** Rarely – individual improvements rarely become organizational knowledge

Your Score: _____



Q15: How much innovation happens in the "spaces between" official processes?

- A) Very little – innovation happens through formal improvement processes
- B) Some – minor optimizations in process execution
- C) Quite a bit – significant innovations in how processes connect
- D) Most of it – our biggest improvements come from unofficial experimentation

Your Score: _____

Section 3 Total: _____/20

4: Assessing Knowledge Vulnerability

Evaluating your organization's resilience to knowledge loss

Q16: If your top performer in each area left tomorrow, how quickly could you restore full capability?

- A) Within days – knowledge is well-documented and shared
- B) Within weeks – some knowledge transfer needed but manageable
- C) Within months – significant knowledge rebuilding required
- D) Six months or longer – would require extensive rehiring and relearning

Your Score: _____

Q17: How much critical organizational knowledge exists only in informal relationships and networks?

- A) Very little – formal systems capture most important knowledge
- B) Some – informal networks supplement formal knowledge
- C) Quite a bit – informal networks are crucial for getting things done
- D) Most of it – the real knowledge is in who knows whom and who trusts whom



Your Score: _____

Q18: When senior people retire or leave, how much knowledge typically walks out the door with them?

- A)** Almost none – we systematically capture institutional knowledge
- B)** A little – minor knowledge gaps that are quickly filled
- C)** A significant amount – noticeable impact on capabilities
- D)** Enormous amounts – major capability losses that take years to rebuild

Your Score: _____

Q19: How well do you understand the decision-making patterns of your most experienced people?

- A)** Very well – we've documented their decision frameworks
- B)** Pretty well – we understand their general approach
- C)** Somewhat – we see the results but not always the reasoning
- D)** Poorly – their decisions often seem intuitive or mysterious

Your Score: _____

Q20: If you had to rebuild your organization's capabilities from scratch, how much knowledge would you be unable to recover from documentation?

- A)** Almost none – our documentation is comprehensive
- B)** A small amount – minor gaps in documented knowledge
- C)** A significant amount – major gaps in how work really gets done
- D)** Most of it – documentation covers procedures but not expertise

Your Score: _____

Section 4 Total: _____/20

5: Automation Readiness Indicators



Assessing your organization's readiness for intelligent automation

Q21: How consistent are the outcomes when different people handle the same type of work?

- A) Very consistent – standardized processes produce reliable results
- B) Mostly consistent – minor variations but similar quality
- C) Somewhat variable – noticeable differences in approach and outcomes
- D) Highly variable – results depend heavily on who does the work

Your Score: _____

Q22: When you map your current processes, how much "exception handling" do you discover?

- A) Very little – processes handle most scenarios smoothly
- B) Some – occasional exceptions that are well-managed
- C) Quite a bit – frequent exceptions require human judgment
- D) Enormous amounts – exceptions are more common than standard cases

Your Score: _____

Q23: How well do your formal process maps reflect the actual decision points people face?

- A) Very well – process maps capture real decision complexity
- B) Pretty well – minor gaps in documented decision points
- C) Somewhat – significant gaps between maps and reality
- D) Poorly – real decision-making is much more complex than documented

Your Score: _____

Q24: When people make decisions, how often do they rely on information that's not in your official systems?



- A) Rarely – official systems contain the information needed for decisions
- B) Sometimes – occasional need for external information
- C) Frequently – regular use of informal information sources
- D) Almost always – official systems are insufficient for real decision-making

Your Score: _____

Q25: How predictable are the workflows and sequences people follow to complete work?

- A) Very predictable – clear, consistent sequences
- B) Mostly predictable – some variation but recognizable patterns
- C) Somewhat unpredictable – significant variation based on context
- D) Highly unpredictable – each situation requires unique approach

Your Score: _____

Section 5 Total: _____/20

Scoring and How to Interpret Results

Your Total Score: _____/100

Calculate your section averages:

- Section 1 (Shadow Workflows): _____/20
- Section 2 (Expertise Visibility): _____/20
- Section 3 (Innovation Detection): _____/20
- Section 4 (Knowledge Vulnerability): _____/20
- Section 5 (Automation Readiness): _____/20

Overall Score



85–100 Points: Visible Organization:

Your organization has exceptional visibility into how work actually gets done. You've successfully captured most tacit knowledge, minimized shadow workflows, and created systems that reflect reality. You're well-positioned for intelligent automation and have strong knowledge resilience.

Key Opportunities:

- Fine-tune existing systems for optimal performance
- Focus on innovation amplification and scaling
- Explore advanced automation for routine tasks

70–84 Points: Partially Transparent Organization

You have good visibility in some areas but significant blind spots in others. Some shadow workflows exist, and important knowledge may be at risk. You have a solid foundation for improvement.

Key Opportunities:

- Systematically address low-scoring sections
- Implement knowledge capture programs
- Map and optimize shadow workflows

55–69 Points: Hidden Work Organization:

Substantial portions of your organization's capability exist in hidden workflows, undocumented expertise, and informal networks. You have significant opportunities for improvement and some serious vulnerabilities.

Key Opportunities:

- Launch comprehensive process intelligence initiative



- Implement systematic knowledge capture
- Address critical knowledge vulnerabilities first

Below 55 Points:

Shadow Organization: Your organization operates primarily through hidden workflows and undocumented expertise. While this may include significant innovations, it also represents major risks and missed opportunities for optimization.

Key Opportunities:

- Begin with knowledge vulnerability assessment
- Map critical shadow workflows
- Implement basic process intelligence capabilities

How to Glean Insights from each Section:

1: Shadow Workflows (Your Score: ____/20)

18–20 Points: Transparent Processes: Your processes align well with reality. Focus on optimization and automation opportunities.

14–17 Points: Minor Shadows: Some workarounds exist. Document and integrate the beneficial ones, eliminate problematic ones.

10–13 Points: Significant Shadows: Important work happens outside official channels. Map these workflows to understand their value and risks.

Below 10 Points: Shadow-Dependent: Your organization relies heavily on undocumented processes. This creates both innovation opportunities and serious vulnerabilities.

Immediate Actions for Low Scores:



1. Interview 3-5 people about how work "really" gets done
2. Map the most critical shadow workflows
3. Assess which shadows add value vs. create risk

2: Expertise Visibility (Your Score: ____/20)

18-20 Points: Expert Knowledge Captured: You understand and can replicate your best performers' methods.

14-17 Points: Partial Expertise Mapping: Good understanding of some expertise, gaps in others.

10-13 Points: Limited Expertise Visibility: Significant expertise exists that you don't fully understand or capture.

Below 10 Points: Expertise Black Boxes: Critical knowledge is locked in individual minds, creating major vulnerabilities.

Immediate Actions for Low Scores:

1. Identify your top 3 most critical experts
2. Conduct knowledge transfer sessions
3. Document decision-making patterns

3: Innovation Detection (Your Score: ____/20)

18-20 Points: Innovation Engine: You systematically capture and scale innovations from across the organization.

14-17 Points: Selective Innovation Capture: Some innovations are identified and scaled, others are missed.

10-13 Points: Inconsistent Innovation Harvesting: Innovations happen but aren't systematically leveraged.



Below 10 Points: Innovation Loss Significant innovations occur but remain localized, representing massive missed opportunities.

Immediate Actions for Low Scores:

1. Survey teams for recent improvements or innovations
2. Create channels for sharing successful experiments
3. Implement pilot programs for promising innovations

4: Knowledge Vulnerability (Your Score: ____/20)

18–20 Points: Knowledge Resilient: Your organization can weather personnel changes with minimal disruption.

14–17 Points: Moderate Vulnerability: Some knowledge risks exist but are manageable.

10–13 Points: Significant Vulnerability: Important knowledge could be lost with personnel changes.

Below 10 Points: Critical Vulnerability: Your organization faces serious risk of capability loss through normal personnel changes.

Immediate Actions for Low Scores:

1. Identify single points of failure (knowledge held by only one person)
2. Prioritize knowledge transfer for highest-risk areas
3. Implement cross-training initiatives

Section 5: Automation Readiness (Your Score: ____/20)

18–20 Points: Automation Ready: Your processes are well-understood and standardized enough for intelligent automation.



14-17 Points: Partially Automation Ready: Some processes ready for automation, others need standardization first.

10-13 Points: Limited Automation Readiness: Significant process understanding needed before automation attempts.

Below 10 Points: Pre-Automation Phase: Focus on process intelligence and standardization before considering automation.

Immediate Actions for Low Scores:

1. Map actual workflows (not documented processes)
2. Identify highest-volume, most consistent processes
3. Document decision criteria and exception handling

Action Plan

Based on your assessment results, here's your prioritized roadmap:

Immediate Actions (Next 30 Days)

If your lowest score was Section 1 (Shadow Workflows):

1. **Shadow Workflow Mapping:** Interview 5 people about how they actually complete common tasks
2. **Value Assessment:** Determine which shadows add value vs. create problems
3. **Quick Documentation:** Document the 3 most critical shadow processes

If your lowest score was Section 2 (Expertise Visibility):

1. **Expert Identification:** List people others turn to when standard processes fail



2. **Knowledge Interview:** Spend 1 hour with your most critical expert understanding their approach
3. **Decision Documentation:** Record the decision criteria for 3 complex scenarios

If your lowest score was Section 3 (Innovation Detection):

1. **Innovation Survey:** Ask teams what improvements they've made in the last 6 months
2. **Success Story Collection:** Document 3 cases where someone found a better way
3. **Sharing Mechanism:** Create a simple way for people to share improvements

If your lowest score was Section 4 (Knowledge Vulnerability):

1. **Risk Assessment:** Identify your top 3 single points of knowledge failure
2. **Knowledge Transfer Planning:** Schedule knowledge transfer sessions with critical experts
3. **Backup Development:** Begin cross-training for highest-risk knowledge areas

If your lowest score was Section 5 (Automation Readiness):

1. **Process Reality Check:** Compare documented processes to actual workflows for 3 key processes
2. **Decision Point Mapping:** Document where human judgment is required
3. **Consistency Analysis:** Assess outcome variations across different performers

90-Day Strategic Initiatives



For All Organizations:

1. **Process Intelligence Implementation:** Begin systematic observation of how work actually flows
2. **Knowledge Capture Program:** Implement structured methods for preserving critical expertise
3. **Innovation Amplification:** Create systems for scaling successful local improvements

Actions based Specific Scores:

Visible Organizations (85–100 points):

- Focus on advanced analytics and predictive capabilities
- Implement sophisticated automation for routine tasks
- Create innovation labs for emerging opportunities

Partially Transparent Organizations (70–84 points):

- Systematic gap closure in lowest-scoring areas
- Implementation of process monitoring capabilities
- Structured knowledge management programs

Hidden Work Organizations (55–69 points):

- Comprehensive workflow mapping initiative
- Critical knowledge preservation projects
- Shadow workflow integration and optimization

Shadow Organizations (Below 55 points):

- Emergency knowledge vulnerability assessment



- Basic process intelligence implementation
- Cultural change toward transparency and documentation

Technology and Tool Recommendations

For Process Intelligence

- **Workflow monitoring tools** for understanding actual process flows
- **Screen recording and analysis** for capturing tacit knowledge
- **Decision tracking systems** for documenting judgment patterns
- **Performance analytics** for identifying optimization opportunities

For Knowledge Management

- **Video documentation platforms** for capturing expert demonstrations
- **Decision tree builders** for mapping complex judgment scenarios
- **Knowledge sharing platforms** for scaling innovations
- **Cross-training management systems** for vulnerability mitigation

For Automation Readiness

- **Process mining software** for discovering actual workflows
- **Business rules engines** for capturing decision logic
- **Exception handling systems** for managing non-standard cases
- **Performance measurement tools** for consistency analysis

Building Your Business Case

ROI Potential by Focus Area

Shadow Workflow Optimization



- **Efficiency Gains:** 15–25% reduction in process completion time
- **Quality Improvement:** 20–30% reduction in errors and rework
- **Cost Savings:** Elimination of duplicate efforts and resources

Expertise Visibility Enhancement

- **Knowledge Transfer:** 50–70% faster onboarding of new team members
- **Risk Mitigation:** Reduced business disruption from personnel changes
- **Performance Scaling:** Replication of best practices across teams

Innovation Amplification

- **Improvement Velocity:** 3–5x faster implementation of beneficial changes
- **Competitive Advantage:** Systematic capture of breakthrough innovations
- **Employee Engagement:** Recognition and scaling of individual contributions

Knowledge Vulnerability Reduction

- **Business Continuity:** Maintained capabilities during personnel transitions
- **Succession Planning:** Systematic preparation for leadership changes
- **Institutional Memory:** Preservation of critical organizational knowledge

Automation Readiness

- **Implementation Success:** 60–80% higher automation project success rates



- **Time to Value:** 40–50% faster automation deployment
- **Maintenance Reduction:** Lower ongoing support requirements for automated processes

Next Steps: From Assessment to Action

Immediate Next Steps

1. **Share Results:** Discuss your assessment results with key stakeholders
2. **Priority Setting:** Focus on your lowest-scoring section for immediate attention
3. **Resource Planning:** Identify budget and personnel for improvement initiatives

Implementation Support

Your assessment results qualify you for:

- **Strategy Session:** 90-minute consultation to develop your specific action plan
- **Pilot Program:** 30-day focused implementation in your highest-priority area
- **Technology Evaluation:** Assessment of process intelligence and automation platforms
- **Change Management:** Support for organizational transformation initiatives

Continuing Your Journey

This assessment is the beginning, not the end. Consider:



Quarterly Re-Assessment: Track progress and identify new opportunities

Department-Level Analysis: Extend assessment to other organizational areas

Industry Benchmarking: Compare your results to similar organizations

Advanced Diagnostics: Deep-dive analysis of specific high-impact areas.

Ready to turn insights into action?

Your assessment results represent a roadmap for organizational transformation. The gap between where you are and where you could be represents both risk and opportunity.

Contact us for personalized guidance on:

- Developing your specific action plan
- Implementing process intelligence solutions
- Building organizational capabilities for the age of AI

Future Frontiers: Illuminating the Path from Where You Are to Where You're Heading.