



**American
Red Cross**

TRANSPORTATION SPECIALIST JOURNEY

Start With The Applicant.

A roadmap, a responsible person, and a clear next step—from interest to the first completed route.

Follow the applicant.

Keep the record current.

Let the measurements grow from the work.

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01 | A ROADMAP AND AN OWNER

Two ways to begin. I suggest we follow the applicant.

We can design a measurement tool first. Or we can follow each applicant and let that experience show us what to measure. I suggest we follow the applicant: know where they are, what comes next, and who will follow up.

A ROADMAP FOR EACH APPLICANT



Illustrative sequence, not a new operating procedure. Entry paths differ; checks, screening and training may overlap or occur in a different order.

Someone owns the follow-through.

Assign a supervisor who finds out where the applicant stands, keeps the record current, and makes sure the next action has an owner.

When responsibility changes, the receiving person acknowledges the handoff. The applicant should not disappear between teams.

ONE APPLICANT’S ROADMAP

Completed Steps finished and their dates
Current Position Where they are and since when
Next Action What needs to happen next
Responsible Person Who tracks this applicant and who acts next
Follow-Up When to check back; what is holding things up
Outcome Advanced, waiting, exited or redirected; reason if known

The supervisor opens the volunteer’s record, finds out where they actually stand, and records what needs to happen next.

02 | ONE RECORD, THREE CONNECTED VIEWS

Follow the person. See the bigger picture.

The applicant roadmap is the starting point. The map and flow diagram use the same demo records. Update a record once; the other views update with it.

1 • Applicant Roadmap

Find a person by name. See their current step, the delay, the next action and who is responsible. Filter the table by division, region or supervisor.

2 • Map

See where applicants are. Select an area to open its applicant list and find out who needs follow-up.

3 • Sankey — The Flow Diagram

See how applicants move through the process: who advances, who waits and who leaves. Use it to spot where follow-up may help.

EXAMPLE SUMMARY • INVENTED NUMBERS

120	68	19	42
Applicants	Still In Process	Need Follow-Up	First Route Done

Make The Next Action Obvious.

APPLICANT	HOLD-UP	NEXT ACTION
Alex Adler	Waiting For Training	Confirm A Slot
Jordan Brooks	No Supervisor Assigned	Name An Owner
Taylor Chen	First Route Not Confirmed	Check With The Team

Invented examples: 68 in process + 42 completed + 10 left = 120. The 19 needing follow-up are included in the 68.

Where are they? What is the hold-up?
Who does what next?

03 | REDUCE MANUAL WORK AS WE LEARN

Fill the gaps. Then automate them.

Nobody wants another form to fill out. Use what Volunteer Services already knows. Ask a person only for what is missing.

Green · Supplied By Reports

Use confirmed Volunteer Services reports for dates and statuses they can reliably supply. Green shows the intended source—not a connection already built.

Amber · Entered By A Person

Until a reliable report is available, someone checks the status, records the delay and next action, and confirms training or completed service.



One Applicant Record

Source · Status · Dates · Next Action · Responsible Person · Outcome



Recurring Gaps Show What To Automate Next

Build the report, connection or reminder that removes repeated manual work.

First: How Are They Doing It Today?

Ask a supervisor to walk through one applicant using today's tools. Where do they look? How do they know the status? Who follows up? We still need that practical walkthrough.

Then: Try It With A Small Group.

Confirm who owns each handoff, which reports are available, and what proves a first route was completed. Try the roadmap with a small group; automate repeated manual work next.

Discussion proposal · Not an approved operating procedure. Based on the October 13 meeting notes, process-map data points, repaired v4 journey blueprint, and Jeff Franzen's October 30 direction. The working demo uses invented records. Edits update its views within one browser; there is no Volunteer Services feed or cross-computer sharing. Workflow, report access, event definitions and ownership remain to be confirmed. [Open The Applicant Roadmaps Demonstration.](#)