

Small Business Process Checkup

10 signs unclear processes may be costing your business time

How to use it: Check every statement that sounds familiar. Be honest - this is not a grade. It is a quick way to see where clearer systems could make work easier.

☐ 1 Important tasks are handled differently depending on who does them.

☐ 2 Only one person knows how to complete certain tasks.

☐ 3 Customer information is scattered across emails, notes or spreadsheets.

☐ 4 Employees regularly ask the same questions about routine work.

☐ 5 Follow-ups, approvals or deadlines are sometimes missed.

☐ 6 New employees learn mostly by watching someone else or figuring it out.

☐ 7 Forms, templates or customer messages are inconsistent or outdated.

☐ 8 The same information is entered into more than one system.

☐ 9 When someone is absent, their work slows down or stops.

☐ 10 Everyone stays busy, but it is difficult to tell where time is going.

Your score:

Count the boxes you checked, then turn the page to see what it means.

___ / 10

What Your Score Means

A few small improvements can remove a surprising amount of busywork.

0-2**Strong foundation**

Your basic processes appear fairly clear. Focus on keeping documents current and reviewing them as your business grows.

3-5**Room to simplify**

A few unclear or inconsistent processes may be creating repeat questions, delays or unnecessary steps.

6-8**Processes need attention**

Your team may be relying too heavily on memory, individual employees or scattered information. Start with the task causing the most frustration.

9-10**Start with a process reset**

Daily work is likely harder than it needs to be. Do not try to fix everything at once - choose one customer-facing or money-related process first.

Choose one place to begin

- 1 Write down the steps as they happen today.
- 2 Circle repeated work, delays and unclear handoffs.
- 3 Create one simple checklist, template or written procedure.

You do not have to untangle it alone.

ProcessLift helps small businesses turn scattered tasks into clear, repeatable processes - including SOPs, checklists, templates, trackers and customer communications.

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Simple processes. Steady growth.