BUSINESS PROCESS REVIEW CHECKLIST

Get ready

- Purpose: What is the driving force behind the review?
- What's going well: Current business strengths? Recent achievements?
- Areas for improvement: What are your weaknesses? Recent challenges? Have you happened upon a bottleneck? What unworkable process are you trying to fix?

Map it out

- How does work flow through your business? You could use a visual tool like Miro or Figma for this, or open up a basic text editor and dot–point it out.
- The goal is to clearly see what your steps are, and how they connect. In other words, how does your work get done?

Dive into the details

- Day–to–day operations: Look for inefficiencies, bottlenecks, or tasks that could be automated or streamlined. What's frustrating you, or eating up your time? What internal tasks are taking you the longest, or have the most complicated steps?
- Finances: Review revenue, expenses, and profitability to spot trends and areas for improvement. Where is the money coming from? Particular services, clients, industries, locations, or marketing? Which job types are most profitable? Do you have repeat clients? What are you spending money on? Are any jobs/clients repeatedly causing budget or time blowouts? What traits do these share?
- Employee engagement: If you have any employees, ask for their input about what's working and where support is needed. Do they have any suggestions on how the company can do better? Either way, check–in with yourself! What do you enjoy most? What do you enjoy least?
- Client feedback: Use feedback to identify gaps in service or product quality. Have your clients mentioned any pain points? If not, can you ask them?
- Market position: Check out your competitors to spot opportunities to stand out. Are there any recent or upcoming changes in your industry that could pose a risk or opportunity?

Find solutions

- Which part of the business would benefit most from a process change?
- What could be automated?
- Are there any unnecessary steps?
- Which tools aren't working for you anymore, or need adjustment? Make sure your existing software supports any changes—or look at new options if needed.
- Are there any missing skills that could be gained through training, or by involving other people?
- If you had to double your current workload, where would the biggest pressure point be?

Take action

- What are you going to do?
- If you're in a team, who's responsible?
- What's needed?
- What's your timeframe?
- Think about what could go wrong with the changes and how to handle it

Keep improving

- How and when will you run business reflection sessions?