

Business Flow Optimisation Checklist

Checklist Sections:

Checklist Sections:

- 1. Discovery & Audit
- 2. Process Mapping
- 3. Tools & Systems Alignment
- 4. Feedback & Iteration Loops
- 5. Scalability Readiness
- Scoring

Select a section to view, click Return to come back to the selection page

Tick all that apply

Place the total number of ticks in the Section Total to identify weak points in your workflow and processes.

1. Discovery & Audit

We have clearly defined business goals for the next 6-12 months.	<input type="checkbox"/>
We have documented all core processes (sales, onboarding, delivery, support).	<input type="checkbox"/>
Team members describe our workflows the same way.	<input type="checkbox"/>
We track KPIs that truly reflect operational performance.	<input type="checkbox"/>
We know where bottlenecks typically occur.	<input type="checkbox"/>

☐ Section total:

Don't forget to visit our [Resource Library](#) for more free helpful tools.

2. Process Mapping

There are SOP (standard operating procedure) documents for each recurring process.	<input type="checkbox"/>
Tasks are assigned to clear owners with deadlines.	<input type="checkbox"/>
Handoffs between departments rarely cause delays.	<input type="checkbox"/>
We use automation or templates to reduce manual work.	<input type="checkbox"/>
Someone new can follow the process without confusion.	<input type="checkbox"/>

☐ Section total:

3. Tools & Systems Alignment

All tools/platforms are integrated to avoid duplicate work.	<input type="checkbox"/>
Our team is trained on how to use each system effectively.	<input type="checkbox"/>
Our software is well priced and used effectively.	<input type="checkbox"/>
Data flows (like Lead-> CRM -> invoice) are fully automated.	<input type="checkbox"/>
We review tool performance every quarter.	<input type="checkbox"/>

☐ Section total:

4. Feedback & Iteration Loops

We collect feedback regularly from customers and team members.	<input type="checkbox"/>
We review operations monthly or quarterly.	<input type="checkbox"/>
We use performance data to inform change.	<input type="checkbox"/>
We identified "quick wins" and long-term projects.	<input type="checkbox"/>
There is a clear process for implementing improvements.	<input type="checkbox"/>

☐ Section total:

5. Scalability Readiness

Our process can handle 2x the volume without breaking.	<input type="checkbox"/>
There is a hiring or delegation system in place.	<input type="checkbox"/>
We have dashboards that show real-time performance.	<input type="checkbox"/>
Roles and responsibilities are scalable.	<input type="checkbox"/>
We have scenario-tested for team and/or customer growth.	<input type="checkbox"/>

☐ Section total:

Summary

1. Discovery & Audit	
2. Process Mapping	
3. Tools & Systems Alignment	
4. Feedback & Iteration Loops	
5. Scalability Readiness	
Total Optimisation:	

- ☐ 0-10: Major overhaul needed
- ☐ 11-20: Room for improvement
- ☐ 21-25: High-performing, scalable workflows

Free Assessment

Not sure where to go from here?

Book a **20-minute free** consult to discuss your results and next steps.

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