

Business Process Audit Checklist

A practical checklist for finding the slow, manual and costly steps in how your business runs, and deciding what to fix first.

Work through this with the people who actually do the work. Tick what is true today. Anything you cannot tick is usually where time and money are leaking.

1. Map your core processes

- We have written down the main processes that run the business
- Each process has a clear start point and end point
- We know who owns each process
- We know which tools or systems each process touches
- New team members can follow the process without being shown in person

2. Find the bottlenecks

- We know which steps people complain about most
- We know where work waits for approval or for someone else
- We know which steps are done twice or re-entered into another system
- We know which steps cause the most errors or rework
- We can see how long each process takes from start to finish

3. Spot automation opportunities

- We have listed the tasks that repeat every day or week
- We have flagged the tasks that follow the same fixed steps each time
- We have flagged data that is copied by hand between tools
- We have flagged reminders and follow-ups that are sent manually
- We have flagged reports that are rebuilt by hand each time

4. Data and handoffs

- Information is entered once, not re-keyed in several places



- Handoffs between people or teams are clear and tracked
- Nothing important lives only in one person's head or inbox
- We can find the current status of any job quickly

5. Decide what to fix first

- We have picked one or two quick wins with high impact and low effort
- We have agreed how we will measure time saved or errors avoided
- We have made sure we are improving the process before automating it
- We have a named owner for each improvement

Want a hand applying this?

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