Business Process Checklist

A business process checklist for mapping, documenting and improving any recurring workflow.

Define goals and scope

- [ ] Name the process and the outcome it should deliver.
- [ ] State the problem or opportunity prompting the review.
- [ ] Set clear goals such as faster cycle time or fewer errors.
- [ ] Define where the process starts and ends.
  Pick the trigger event and the final deliverable.
- [ ] Identify the customer of the process and what they expect.
- [ ] Agree how you will measure success before you begin.

Map the current steps

- [ ] Walk through the process with the people who run it.
- [ ] Record every step, decision and handoff in order.
- [ ] Capture how the work flows today, not the ideal version.
- [ ] Note the time each step takes and any waiting between them.
- [ ] Mark the systems, forms and data used at each step.
- [ ] Draw the flow as a simple diagram everyone can read.

Identify owners and inputs

- [ ] Assign one accountable owner for the whole process.
- [ ] Name who performs each individual step.
- [ ] List the inputs each step needs to start.
- [ ] Identify suppliers or teams that feed into the process.
- [ ] Flag steps with unclear or shared responsibility.
- [ ] Confirm everyone agrees the map reflects reality.

Find bottlenecks and waste

- [ ] Locate steps where work waits or piles up.
- [ ] Spot duplicate, redundant or unnecessary steps.
- [ ] Identify manual handoffs prone to delay or error.
- [ ] Find rework loops caused by mistakes upstream.
- [ ] Ask why each questionable step exists and what it adds.
- [ ] Rank the issues by impact on speed, cost and quality.

Redesign and document

- [ ] Redesign the flow to remove waste and shorten handoffs.
- [ ] Combine, reorder or eliminate steps where it is safe to.
- [ ] Standardize the inputs and decisions for the new flow.

- [ ] Write clear instructions for the improved process.
- [ ] Validate the redesign with the people who will run it.
- [ ] Plan the change so the switch causes minimal disruption.

Automate where it helps

- [ ] List repetitive, rule-based steps suited to automation.
- [ ] Choose tools that fit the volume and your existing stack.
- [ ] Automate notifications, routing and data entry first.
- [ ] Keep judgment-heavy steps with the right people.
- [ ] Test the automation on a small batch before full rollout.
- [ ] Add a fallback for when an automated step fails.

Set KPIs and review

- [ ] Choose a few metrics tied to your original goals.
- [ ] Measure cycle time, throughput and error rate.
- [ ] Capture a baseline before changes go live.
- [ ] Set targets and assign who tracks each metric.
- [ ] Schedule regular reviews of the process performance.
- [ ] Refine the process when the numbers reveal new issues.