

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.