

Workflow Assessment Checklist

A 10-minute self-assessment for owners of 1-25 person service businesses. Tick every statement that is true today. There are no right answers - the goal is to see, on one page, where your processes settled rather than were designed, and where you have become the bottleneck.

1. Where does your time go?

- ☐ I approve or review most client-facing communications before they go out.
- ☐ Scheduling decisions (appointments, deadlines, meetings) usually need my input.
- ☐ My team waits on me at least once a day before they can move work forward.
- ☐ I spend evenings or weekends catching up on administrative work.
- ☐ If I took two weeks off, at least one core process would stall.

2. How did your processes form?

- ☐ Our client intake process was never deliberately designed - it just evolved.
- ☐ Key steps live in someone's head rather than in a written procedure.
- ☐ The same information is typed into more than one system.
- ☐ Follow-ups happen when someone remembers, not on a schedule.
- ☐ Different team members complete the same task in different ways.

3. Where does work slow down or break?

- ☐ Documents or information are regularly chased from clients by email.
- ☐ Invoices go out late or inconsistently.
- ☐ We have missed, or nearly missed, a deadline because a reminder was manual.
- ☐ Errors are caught late because nobody checks until the end.
- ☐ Onboarding a new client takes noticeably longer than it should.

4. What are your risk and compliance considerations?

- ☐ We handle confidential client, financial or health information.
- ☐ Our regulator (e.g., LSO, CPA Ontario, a health college) expects defensible records.
- ☐ Certain actions must always be reviewed by a qualified person before they happen.
- ☐ We need to know where client data is stored (and prefer it stays in Canada).
- ☐ We would need a way to pause any automation instantly if something looked wrong.

5. How ready are you?

- Our core tools (e.g., Microsoft 365, Google Workspace, Clio, QuickBooks) are in place.
- I can name the one recurring task I would most like to stop doing myself.
- I can free up about 2-3 hours over the next few weeks to describe how we work.
- I would rather prove one improvement than attempt a large transformation.
- I want to see measured before-and-after results, not projections.

Reading your results

0-7 ticks: Your processes are largely holding up. Keep an eye on sections 1 and 3 as you grow.

8-15 ticks: You are likely carrying work that a well-designed workflow could handle. A single, carefully chosen automation could return meaningful time.

16+ ticks: You are very likely the bottleneck. The priority is not more tools - it is understanding how work actually flows, then fixing one workflow at a time.

Next step

Book a free, no-obligation 30-minute initial conversation with Stratadyne. We will look at your answers together, tell you honestly whether a Workflow Diagnostic makes sense, and give you a fixed-fee quote if it does. Visit the [Contact](#) page on our website to request a time.