

OWNER OVERTRIDE DECISION AUDIT

A practical worksheet to identify which decisions still depend on you and where your business needs clearer rules.



How To Use This Audit

Choose one active workflow such as lead intake, proposal approval, client onboarding, project handoff, service exceptions, or billing questions. Work through the questions honestly. The goal is not to remove the owner from every decision. The goal is to identify which repeat decisions should not need owner interpretation anymore.



PART 1: DECISION INVENTORY

List 8 to 12 decisions that came back to the owner during the last two weeks. Include small questions, approvals, exceptions, and judgment calls.

- What decision was needed?
- Who asked for it?
- What information was missing?
- Was the decision routine, risky, custom, urgent, or unclear?
- Could the team have handled it if the rule was clearer?

PART 2: SCORE THE OWNER-DEPENDENCY RISK

Rate each recurring decision from 1 to 5. A score of 1 means the team can handle it consistently without owner input. A score of 5 means the work stops or becomes risky without the owner.

- Frequency: How often does this decision appear?
- Impact: Does it affect revenue, client trust, deadlines, or quality?
- Clarity: Are the rule and required information documented?
- Visibility: Can the owner see status without interrupting the team?
- Delegation: Does a role, not a person, clearly own the next step?

PART 3: DECIDE THE FIX

For each decision with a high score, choose the lightest useful fix.

- Clarify the rule.
- Create a checklist or SOP.
- Add a CRM field, form field, or dashboard status.
- Create an approval lane for high-risk decisions.
- Delegate routine decisions to a role with clear boundaries.
- Use automation or AI assistance only after the decision path is clear.



PART 4: YOUR FIRST 30-DAY ACTION

Pick one owner override to remove this month. Define the trigger, rule, owner, escalation point, and visibility method. Then test it with the team before expanding it.

WANT HELP TURNING THIS INTO A WORKING SYSTEM?

WOWSuccessTeam can help turn what you find here into clearer rules, cleaner workflows, better visibility, and practical business systems.

[Schedule A 1-2-1 Meeting](#)

