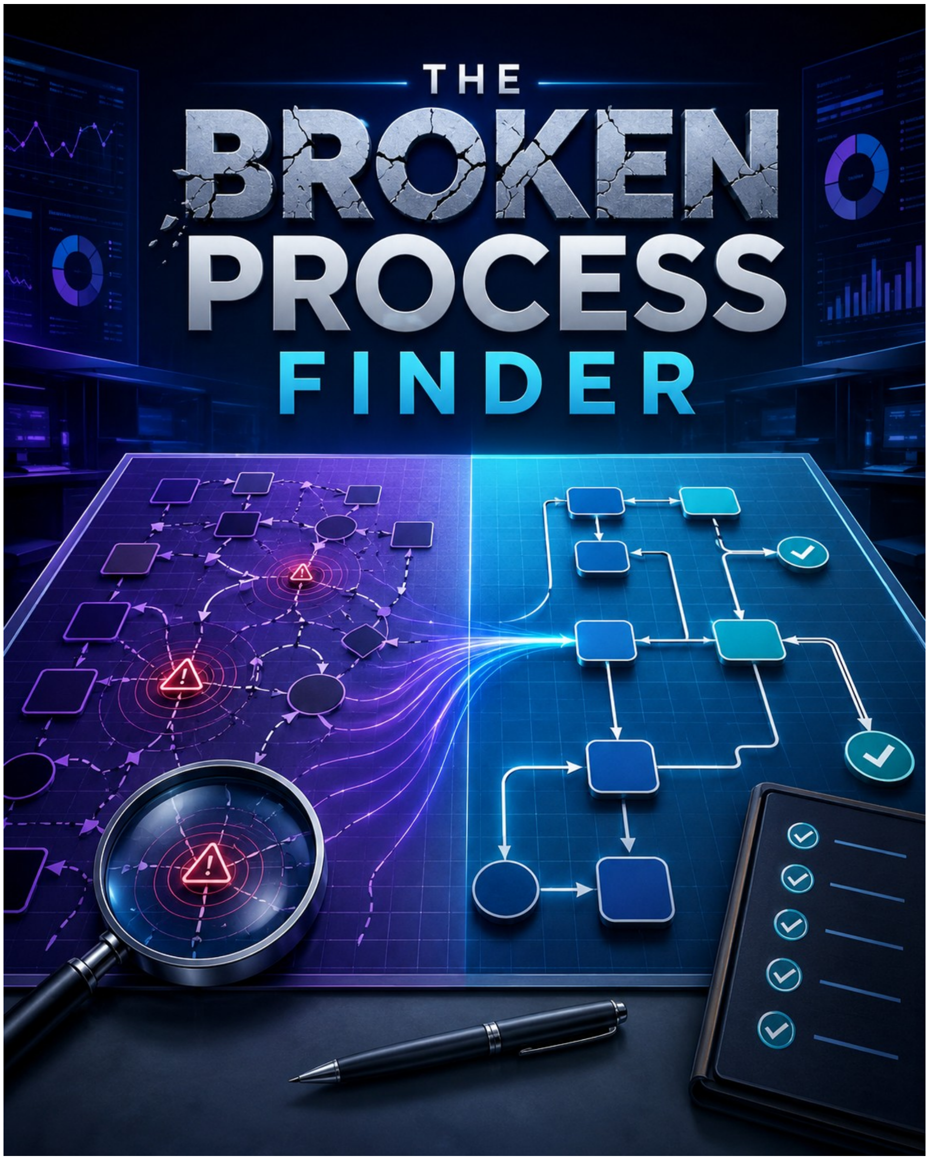
The Broken Process Finder

15 Questions to Identify Where Your Business Is Leaking Time, Leads, and Profit



Alt text: A blue and violet process audit board showing checklist markers and workflow leak points.

Use this worksheet before adding another app, automation, or AI tool. It is designed to help you spot the places where your current process is unclear, manual, delayed, or too dependent on one person.

How to Use This Worksheet

For each question, mark Yes, No, or Not Sure. Any No or Not Sure answer is a potential process leak. You do not need to fix everything at once. Start with the leak that creates the most delay, rework, or owner stress.

15-Question Process Leak Finder

1. Lead intake: When a new lead comes in, is there one clear place where the request is captured?

[ ] Yes [ ] No [ ] Not Sure

2. Lead ownership: Does everyone know who is responsible for the next follow-up step?

[ ] Yes [ ] No [ ] Not Sure

3. Follow-up timing: Can you tell whether every lead receives a timely response without asking around?

[ ] Yes [ ] No [ ] Not Sure

4. Status visibility: Can you see the current status of important work without searching email, texts, or memory?

[ ] Yes [ ] No [ ] Not Sure

5. Duplicate entry: Is the same information being typed into more than one system?

[ ] Yes [ ] No [ ] Not Sure

6. Handoffs: Are client or project handoffs consistent enough that nothing important gets lost?

[ ] Yes [ ] No [ ] Not Sure

7. Owner bottleneck: Does work stop when the owner is unavailable or too busy to answer questions?

[ ] Yes [ ] No [ ] Not Sure

8. Tool clarity: Does each app have a clear job, or do tools overlap and confuse the team?

[ ] Yes [ ] No [ ] Not Sure

9. SOP usefulness: Are your SOPs current, easy to use, and connected to the real workflow?

[ ] Yes [ ] No [ ] Not Sure

10. Decision rules: Does the team know what requires approval and what can move forward without waiting?

[ ] Yes [ ] No [ ] Not Sure

11. Client onboarding: Is the client experience consistent after someone says yes?

[ ] Yes [ ] No [ ] Not Sure

12. Task routing: Do tasks automatically land with the right person, or does someone manually direct traffic?

[ ] Yes [ ] No [ ] Not Sure

13. Missing information: Do requests often stall because key details were not collected up front?

[ ] Yes [ ] No [ ] Not Sure

14. Reporting: Can you review the health of the business weekly without building a report by hand?

[ ] Yes [ ] No [ ] Not Sure

15. AI readiness: If AI helped with this process, would it have clear steps, context, and approval boundaries to follow?

[ ] Yes [ ] No [ ] Not Sure

What Your Answers Mean

0-2 leaks: Your process may be stable, but choose one place to make visibility easier.

3-6 leaks: You likely have a process that needs cleanup before another tool will help.

7 or more leaks: The business may be relying too much on memory, manual effort, or owner intervention. Start with one high-impact workflow and define it clearly before adding AI or automation.

Next Steps

- Circle any question where the answer is no, sometimes, or I am not sure.
- Choose the three questions that create the most delay, rework, or stress.
- Pick one process to improve first. Good starting points are lead intake, follow-up, onboarding, billing, or weekly visibility.
- Define the trigger, owner, required information, decision points, tools, and completion step.
- Only then decide whether AI, automation, CRM cleanup, dashboarding, or an SOP would make the process stronger.

Process to Improve First

Workflow name: ____

Where it starts: ____

Who owns the next step: ____

What information must be captured: ____

What approval is required: ____

What tells us this process is complete: ____

CTA

Need help finding the leak before adding another tool? WOWSuccessTeam helps business owners simplify workflows, clarify handoffs, and build practical systems that support cleaner growth.

Schedule a practical business systems conversation. https://calendly.com/wowsuccessteam/get-ready-grow