



WORKFLOW AUDIT CHECKLIST

Fix the Workflow. Scale the Business.

Use this checklist to assess where manual work, workarounds, and process gaps are costing you time and money. Work through each section honestly — the goal is a clear picture of your current state, not a perfect score. Bring this to your discovery call or use it on your own to prioritize next steps.

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CURRENT STATE SNAPSHOT

Check every statement that is true for your business today

- We have a documented process map or SOP for our most critical workflows.
- Our team spends more than 2 hours/week on tasks that feel repetitive or manual.
- We regularly re-enter the same data in more than one system (e.g., orders, contacts, inventory).
- We have missed deadlines or customer commitments because of a process breakdown.
- We rely on one or two key people to keep a process running — it would break if they left.
- We have a clear view of work-in-progress across our operation at any given moment.
- Our quoting, order entry, or fulfillment process has more than 5 manual hand-off steps.

Notes / observations:

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PAIN POINT IDENTIFICATION

Mark the areas where problems most frequently occur

ORDER MANAGEMENT & FULFILLMENT

- Orders are entered manually from emails, calls, or faxes
- Customer delivery dates are estimated, not confirmed against capacity
- Order status requires checking multiple systems or asking someone
- Rush / expedite requests disrupt normal workflow weekly or more

INVENTORY & PURCHASING

- We stock out of items that should have been reordered automatically
- We carry excess inventory because reorder points aren't set or trusted
- Purchase orders are created manually from spreadsheets or tribal knowledge
- Vendor lead times are not tracked or used in planning

QUOTING & SALES

- Quotes take more than 24 hours to produce for standard requests
- Pricing or margin errors are discovered after quotes are sent
- We lose track of open quotes or follow-up timing



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QUALITY & COMPLIANCE

- Quality holds or inspection steps are tracked on paper or in spreadsheets
- We discover quality issues at shipping rather than at the source
- Non-conformances are recorded inconsistently across shifts or teams
- Compliance documentation is assembled manually before audits

REPORTING & VISIBILITY

- Key metrics (on-time delivery, margin, throughput) are calculated manually
- Leadership makes decisions without current data
- Month-end close or billing requires significant manual reconciliation
- We don't know where our biggest bottleneck is right now

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PROCESS VOLUME & FREQUENCY

Fill in estimates — rough numbers are fine

Process / Task	Freq. per Week	Avg. Time per Occurrence	Who Does It
Order entry			
Quote preparation			
Purchase order creation			
Inventory count / adjustment			
Shipment scheduling			
Invoice creation / posting			
Report building (any type)			
Customer status updates			
Quality / inspection logging			
Other: _____			

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TECHNOLOGY INVENTORY

List the tools your team uses day-to-day

Tool / System Name	What It's Used For	Integration Points (if any)	Pain Points / Gaps
ERP / accounting system			
CRM / sales tool			



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Tool / System Name	What It's Used For	Integration Points (if any)	Pain Points / Gaps
Inventory / WMS			
Scheduling / dispatch			
Spreadsheets (Excel / Sheets)			
Email / calendar			
Other: _____			
Other: _____			

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OPPORTUNITY SCORING

Rate each dimension 1–5 for your top 3 improvement opportunities

Scoring guide: **Frequency** — how often does this happen? **Time Cost** — hours lost per week? **Error Risk** — how often does it cause mistakes? **Visibility** — can leadership see the impact? Sum the scores — anything 14+ is a high-priority target.

Opportunity / Process	Frequency (1–5)	Time Cost (1–5)	Error Risk (1–5)	Visibility (1–5)	TOTAL
1.					
2.					
3.					

6

NEXT STEPS

When you're ready to act

- I've completed this checklist and identified my top 1–3 process pain points.
- I've noted which processes cost the most time and carry the highest error risk.
- I understand which tools are in place and where the gaps are.
- I'm ready to discuss what a programmatic solution would look like.
- I've scheduled (or I'm ready to schedule) a discovery call with Three Pointe.

READY TO SEE WHAT'S POSSIBLE?

Three Pointe Consulting works with small and mid-size manufacturers, distributors, and service companies to turn workflow problems into measurable results — without overhauling what's working.



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[Schedule a no-pressure discovery call at threepointeconsulting.com](https://threepointeconsulting.com)

This checklist is provided as a self-assessment tool. Results will vary based on your specific processes, systems, and team structure. Three Pointe Consulting is not responsible for decisions made based solely on this document.