
A SIMPLE OPERATIONS

BOTTLENECK CHECKLIST

Check a statement when it happens often enough to affect a customer, consume repeated staff time, or make the business depend on memory.

Company: _____ Date: _____

DEMAND AND INTAKE

- ☐ New inquiries can sit for a full business day without an owner.
- ☐ Customers submit the same information more than once.
- ☐ The team cannot see every open inquiry in one place.
- ☐ Urgent requests and normal requests enter through the same unranked queue.

OWNERSHIP AND HANDOFFS

- ☐ Work regularly waits because the next owner is unclear.
- ☐ A handoff depends on someone remembering to send a message.
- ☐ Two people sometimes assume the other person handled the same task.
- ☐ Customers must ask for status because nobody owns the update.

SYSTEMS AND DATA

- ☐ The same information is typed into two or more systems.
- ☐ Different files show different answers for the same order, customer, or job.
- ☐ A spreadsheet has become a database, workflow, dashboard, and audit trail at once.
- ☐ Only one person knows how an important tracker or tool works.

EXCEPTIONS AND REWORK

- ☐ The team fixes the same preventable mistake every week.
- ☐ Exceptions are handled in private messages instead of the operating system.
- ☐ A bad input can travel several steps before anyone catches it.
- ☐ People create side spreadsheets because the main process cannot handle real work.

CAPACITY AND VISIBILITY

- ☐ The busiest person is also the approval point for routine work.
- ☐ Leaders learn about delays after a customer or employee complains.
- ☐ The team measures completed work but cannot see aging work in progress.
- ☐ Adding customers creates proportionally more admin instead of more output.

READ THE RESULT

- ☐ Circle the three checked statements that create the most customer pain, cash delay, rework, or dependence on one person.
- ☐ If the three statements belong to one workflow, map that workflow from the starting event through the final handoff.
- ☐ Record the input, owner, action, system, decision, exception, output, and next owner at each step.
- ☐ Name the failed handoff and desired result before choosing software or automation.

FIRST WORKFLOW TO FIX
