Introduction

Please use this checklist to evaluate and understand your business processes manually. You will need to collect required inputs in a series of interviews and workshops with process key stakeholders, leaders, participants, and sometimes even customers. This analysis will be influenced by the interviewee’s subjective opinion, role in the process, lack of knowledge, or lack of factually, data-supported evidence. You may hear from those you interview that “they think the process...” or “they believe that...” and this is okay because this approach is very subjective to each participant in the process. You will probably begin to see that many times, interviewees are incorrect or do not fully understand how their input into the process affects other steps either upstream or downstream in the process. It will be your job to figure out from all your manual surveys and interviews how the process truly operates and where improvements can be made.
The Checklist:

Definitions:

☐ Define the process with a name. _______________________________________________________________

☐ Define what confines the process. What is the first event? ____________________________________________

and the last event? ____________________________________________

☐ Define the goals of the process. What should this process accomplish?

   Example: This process should issue an invoice and confirm that it is paid.

☐ Define the process owner. Who is the process leader or is responsible for this process end-to-end?

________________________________________

☐ Define the activities/events/steps that advance the process.

☐ Define the necessary results of each activity/event/step in the process.

☐ Define the participants of the process. What computers (aka bots), people, departments, or facilities interact with this process? ____________________________________________

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☐ Define what information is carried over between steps? ____________________________________________

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☐ Define when errors occur. __________________________________..........................

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☐ Define if the business process is documented and if there are comprehensive descriptions of workflows.

☐ Define the Key Performance Indicators (KPIs) for the process and its steps?

☐ Define the reporting standards and what is used to track and analyze key operational metrics.

Other Questions:

How many employee hours does the process take from start to end?

How many employees’ hours are spent doing rework or repeated steps?

How much does the entire process cost?

What is the average cost of completing this process?

What is causing the higher cost instances/cases?
Research:

☐ Research if the actual process outputs meet required outputs.
☐ Research if special circumstances or environment influences the process performance.
☐ Research bottlenecks. Where they occur and why they happen.
☐ Research potential cost and/or time-saving opportunities.

   Example: any technological or organizational changes that could save resources, labor requirements, or time.

☐ Research potential process steps that can be eliminated or reduced.

Assessment:

☐ Assess the competency of process executors and participants.
☐ Assess the performance of the process.
☐ Assess the financial cost and impact of the process.
☐ Assess if the process is in-line with desired KPIs.
☐ Assess the quality of real time monitoring and compliance of rules, guidelines, regulations and other protocols or laws that govern the process.

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