

BUSINESS FRICTION / FILLABLE CHECKLIST

Where is your business losing time?

A practical 10-minute checklist for Australian small businesses. Find where repeated work, unclear handovers and everyday workarounds consume attention, then choose one useful next step.

01 Use an ordinary working week

1. Use the last four to eight weeks as your reference point. Answer from what usually happens, rather than how the process is meant to work.
2. Rate each of the 20 statements. Score 0 if it genuinely does not apply. Leave an unanswered item blank; a blank is not a zero.
3. Add four answers for each section (maximum 12), then the five section scores (maximum 60). This PDF does not calculate totals.
4. Read the highest section score before the total. Choose one recurring issue, a small change, an owner and a way to judge it.

02 Use the same scale throughout

0	Never or not relevant
1	Sometimes
2	Often
3	Regularly or significantly

Fill the shaded fields in a PDF reader that supports forms, or print and write. Save a copy, close it and reopen it to check your entries. Keep answers brief; use a separate sheet for more detail. Do not enter passwords or other secrets.

Period considered

Completed by or team

This is a reflection guide, not a formal audit, diagnosis or guarantee of results. You do not need perfect information to begin; note uncertainty for later discussion.

Prefer live totals? [Complete the checklist online](#)

THE CHECKLIST / SECTIONS 1 AND 2

Rate everyday friction

0 Never or not relevant / 1 Sometimes / 2 Often / 3 Regularly or significantly

01 Repetitive administration

Look for repeated manual effort that adds little value or depends on one person remembering every step.

	0	1	2	3
1. Staff regularly re-enter the same information into more than one system or document.	☐	☐	☐	☐
2. Routine work depends on copying, pasting, chasing or manually checking information.	☐	☐	☐	☐
3. The same questions, approvals or status requests interrupt people throughout the week.	☐	☐	☐	☐
4. Important recurring tasks rely on memory rather than a clear trigger, list or routine.	☐	☐	☐	☐

Repetitive administration subtotal out of 12

02 Customer response and handovers

Consider what customers experience when work moves between people, inboxes or systems.

	0	1	2	3
1. Customer enquiries wait because ownership is unclear or the right person is unavailable.	☐	☐	☐	☐
2. Different staff give noticeably different answers or service experiences.	☐	☐	☐	☐
3. Customers need to repeat information because handovers are incomplete.	☐	☐	☐	☐
4. The team spends time checking who is doing what or whether a customer has been updated.	☐	☐	☐	☐

Customer response and handovers subtotal out of 12

THE CHECKLIST / SECTIONS 3 AND 4

Check knowledge and tools

0 Never or not relevant / 1 Sometimes / 2 Often / 3 Regularly or significantly

03 Knowledge and consistency

Look at how easily staff can find and apply the business's practical know-how.

	0	1	2	3
1. Key procedures or answers are scattered across emails, documents, chats or individual memory.	☐	☐	☐	☐
2. New or less experienced staff need to ask someone how routine work should be done.	☐	☐	☐	☐
3. Instructions exist, but they are outdated, difficult to find or not followed consistently.	☐	☐	☐	☐
4. A small number of people hold knowledge that would be difficult to replace or transfer.	☐	☐	☐	☐

Knowledge and consistency subtotal out of 12

04 Tools and workarounds

Consider whether current software supports the work - or whether people work around it.

	0	1	2	3
1. Staff use spreadsheets, personal notes or side systems because the main tool does not fit the work.	☐	☐	☐	☐
2. Existing software has useful features that the business rarely or inconsistently uses.	☐	☐	☐	☐
3. Tools do not share information cleanly, creating duplicate work or gaps.	☐	☐	☐	☐
4. The business is considering another tool before clearly defining the problem it should solve.	☐	☐	☐	☐

Tools and workarounds subtotal out of 12

THE CHECKLIST / SECTION 5 AND SUMMARY

Review ownership and totals

0 Never or not relevant / 1 Sometimes / 2 Often / 3 Regularly or significantly

05 Ownership and improvement

Look at how the business chooses, owns and sustains improvements.

	0	1	2	3
1. Tasks or decisions stall because responsibility is shared, assumed or unclear.	☐	☐	☐	☐
2. The owner or one senior person becomes the default answer, approver or problem-solver.	☐	☐	☐	☐
3. The business has more improvement ideas than it can realistically prioritise or complete.	☐	☐	☐	☐
4. Changes begin with enthusiasm but fade because ownership, follow-up or measures are unclear.	☐	☐	☐	☐

Ownership and improvement subtotal out of 12

Bring the five section scores together

Copy each completed subtotal. Rank the highest first; ties are useful prompts for discussion. Do not treat a partial result as a completed overall score.

Area	Score / 12	Rank
Repetitive administration		
Customer response and handovers		
Knowledge and consistency		
Tools and workarounds		
Ownership and improvement		

Overall score out of 60 - complete only when every item is answered

REFLECTION GUIDANCE / MANUAL SCORES

Make sense of the result

Use the score to choose where to look. A higher score does not automatically mean you need new software or AI; it points to an area worth investigating.

0-15	Limited visible friction Most areas appear reasonably controlled. Focus on the highest section score and prevent small issues from becoming habitual.
16-30	Some recurring friction There are likely several avoidable drains on time or consistency. Choose one area with a clear owner and a manageable first change.
31-45	Significant friction Repeated problems are likely affecting staff time, service or confidence. Map the current work before deciding on tools or automation.
46-60	High visible friction Friction appears widespread or frequent. Avoid trying to fix everything at once. Establish priorities, ownership and a staged improvement plan.

03 Start with one visible problem

Two businesses can have the same overall score for different reasons. Read the section scores and discuss the most visible source of friction. A clearer process, better ownership, training, a template or better use of an existing tool may be enough.

First section and recurring issue to investigate

If scores are tied, choose a narrow issue that has a clear owner and can be observed.

Before considering another tool

Who experiences the problem, how often does it occur, and what would a better result look like?

This checklist provides general educational information. It does not replace professional legal, financial, technology, employment or other advice specific to your circumstances. Scores are indicative prompts for discussion, not diagnostic findings.

WORKING PLAN / ONE CONTROLLED IMPROVEMENT

Your next practical step

Choose one issue from a high-scoring section. Keep the first change narrow enough to test, understand and review.

1. The friction to address

What happens now? Describe one recurring example rather than a broad complaint.

2. Why it matters

Who loses time, experiences delay or receives inconsistent service?

3. The likely cause

What appears to create the issue: unclear ownership, missing information, an awkward process, tool limitations or something else?

4. One practical change to test

What is the smallest useful change you could introduce without creating unnecessary complexity?

5. Ownership and timing

Who will own the test, and when will it begin and be reviewed?

6. How you will judge it

What simple evidence would show whether the change helped?

FICTIONAL EXAMPLE / NOT CLIENT EVIDENCE

A worked reflection and plan

This example illustrates how to use the scores. It does not show measured business results or predict what a change will achieve.

Section scores	Repetitive administration 8; customer response and handovers 4; knowledge and consistency 8; tools and workarounds 3; ownership and improvement 4.
Overall score	27 out of 60: some recurring friction. Administration and knowledge tie for the highest section score.
Priority choice	The team chooses repeated entry of enquiry details because it happens each week, has a named owner and can be observed in a small test.
1. Friction	Staff copy the same enquiry details from email into two separate working records.
2. Why it matters	The service team loses time and has to resolve differences between the records.
3. Likely cause	There is no agreed source record or clear rule for which details each person needs.
4. Change to test	Use one agreed source record for a small set of fictional or non-sensitive enquiries before changing the live process.
5. Owner and timing	The service lead owns the test, agrees a start date and sets a review date with the team.
6. Evidence	Compare duplicate entry, missing details and correction work. Include the effort needed to maintain the source record.

The example does not establish that a new tool is needed. If information, permissions or consequences are unclear, resolve them before using live records.

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