



CHECKLIST

Seven questions for a process beside your ERP

One hour, one process, seven questions. Take the process everyone complains about: the quote calculation, the project intake, the monthly report that is put together by hand. Write the answers down. The gaps between the answers are what you are looking for.

Process: Date:

1 How often does the work change hands?

Walk through the process step by step and count the handovers. Every point where the work changes hands is a point where it waits.

Number of handovers: Where it waits longest:

2 What went wrong most recently, and what did it cost?

Name the latest incident and put an amount next to it: hours, a corrected invoice, lost margin. "It's error-prone" moves nobody. An amount moves a budget.

Latest incident: Cost: €

3 Who is that one person?

Who really understands it? And what happens in the week after that person hands in their notice, or goes on holiday for three weeks?

Name or role: What stops then:

4 Where does practice differ from the procedure?

There is always a step people do differently from what the procedure says. Usually that is exactly the step that matters.

The workaround:

5 Where is the same number typed in twice?

Every time something is retyped is another chance of an error, and another person you have to ask which version is right.

Number of times: Where:

6 What has been tried before, and why did it stall?

A failed attempt tells you more about the real constraint than a list of requirements. Usually that constraint is not technical.

Earlier attempt: Why it stopped:

7 What must never happen?

A wrong price sent to a customer? An invoice without metering data? The answers give you the hard constraints faster than a workshop.

Never:

What the answers tell you

Questions without a clear answer	What it means
0-2	The process is documented. You can get a build estimated.
3-4	The process is not really written down anywhere yet. That is the cheaper problem to solve first.
5-7	Nobody has an overview of the process. Start by mapping it, not by building.

Want someone to work through this with your team?



Book a free 30-minute process call and bring your completed checklist. I will tell you honestly what I see, and within two working days you will have that briefly in writing.

[Book a process call →](#)

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