

Chapter 3: Assess Process Health

By now, you've got:

- ✓ A clear strategic goal
- ✓ A list of processes
- ✓ A shortlist of high-risk, high-impact processes to tackle first.

Next step? Figure out exactly what's broken in those processes.

Use a Process Evaluation Worksheet

This worksheet (you'll find it in the appendix) helps you check each process for five key ingredients every solid process should have:

Documentation

Is the process clearly documented? Is it up to date? Can someone new follow it without asking a ton of questions?

Risk Controls

Are there safeguards to catch mistakes before they cause bigger problems? (Think: checks, approvals, signoffs.)

Workflow Design

Are the steps in a logical order? Are there unnecessary steps? Any handoffs that cause delays?

Reporting

Do you have data to monitor if the process is working? Can you spot trends or catch issues early?

Tools, Training, and Skills

Do people have the right tools? Do they know how to use them? Are they trained well?

How to Use It

- ✓ Pick one process from your shortlist.
- ✓ Gather a small team — include people who do the work.

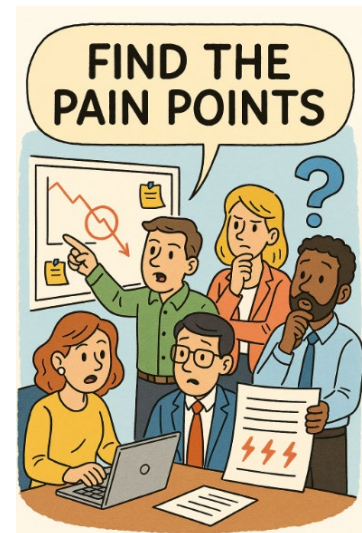
- ✓ Go through each section and answer honestly.
- ✓ Score each element as Strong, Adequate, or Weak.

Look for Patterns.

Once you evaluate a few processes, patterns start to pop up:

- Maybe *most* processes are well-designed but poorly documented.
- Maybe people lack training for certain steps.
- Maybe your reporting is outdated or missing altogether.

These common weak spots become your priority improvement targets.



Deficiency Scoring

The worksheet helps you add up scores for each element so you can see:

- Which single process needs urgent fixing.
- Which elements (like documentation or training) are the weakest *across multiple processes*.

This helps you avoid the “boiling the ocean” trap. You don’t have to fix everything — just fix the biggest problems first.