



Business Systems Optimization Checklist

A practical self-review for Canadian SMEs, professional service firms and entrepreneurs

Find the gaps that cost your business time, visibility and customer opportunities.

Check each statement that is consistently true. Leave gaps unchecked.

Use your answers to choose one improvement to tackle first.

01 Process efficiency & SOPs

- ☐ Our key recurring processes have a named owner.
- ☐ Our team follows current, accessible step-by-step procedures.
- ☐ Work moves between people without repeated follow-up or missing information.
- ☐ We track delays, errors and duplicated work so we can improve them.
- ☐ A new team member can complete routine tasks using our documentation.

02 CRM & customer management

- ☐ Leads and customer information are recorded in one reliable system.
- ☐ Every active opportunity has a clear stage, owner and next action.
- ☐ Customer inquiries receive timely, consistent follow-up.
- ☐ Our CRM data is reviewed for duplicates, accuracy and completeness.
- ☐ We can see which lead sources and sales activities produce results.

Continue on page 2 to review digital tools and choose your next step.



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Turn your findings into a focused improvement plan

03 Digital tools & automation

- ☐ We know which administrative tasks consume the most staff time.
- ☐ Our forms capture the information needed without repeated data entry.
- ☐ Our tools share information where practical, with clear access permissions.
- ☐ Automations have an owner and a process for handling exceptions.
- ☐ Our reports provide reliable information for day-to-day decisions.

Review your results

Count checked statements in each section: Processes __ / 5 CRM __ / 5 Digital __ / 5

Start with the section containing the most gaps, then consider impact and urgency.

This is a reflection tool, not a validated score or a substitute for a business review.

Your next improvement

The task or process causing the most difficulty:

What it costs us in time, errors or missed opportunities:

One practical change we can make:

Owner:

Target date:

How we will measure improvement:

Need help turning gaps into practical improvements?

PlanIt supports Zoho CRM, process improvement and digital transformation.

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