Workflow Audit Checklist

Find where manual work costs you. For manufacturers and distributors.

Walk through each section with the people who do the work, not just the managers. For every item you check, note roughly how many hours a week it costs. The total is what manual work is costing you, and the biggest line is usually where to start.

> To price a checked item: hours a week × 52 × a fully loaded hourly rate. One person spending 90 minutes a day moving data between systems is roughly 375 hours a year; at $30 an hour that is about $11,000, for one person on one seam.

1. Handoffs between systems

- [ ] **Someone types the same order, customer or item into more than one system.** _____ hrs/wk
  Count the systems and the people. Each rekeyed field is a future mismatch.
- [ ] **Data moves between systems by export, spreadsheet and import.** _____ hrs/wk
  Note how often, who does it, and what happens when they are out.
- [ ] **Sales or customer service calls the office to check order status, stock or pricing.** _____ hrs/wk
  Count the calls in a typical day; each is a missing integration.
- [ ] **Nobody can say which system is right when two disagree.** _____ hrs/wk
  Every dataset should have exactly one owner system.

2. Documents arriving by email

- [ ] **Vendor invoices are opened, matched to POs and keyed into the ERP by hand.** _____ hrs/wk
  At 3 to 5 minutes each, 150 to 200 invoices a week is 15 to 20 hours.
- [ ] **Customer purchase orders arrive as PDFs, email text or photos and are keyed as sales orders.** _____ hrs/wk
  At 10 to 15 minutes an order, 200 orders a week is more than a full-time job.
- [ ] **Supplier order confirmations and ship notices are read and filed manually, or not at all.** _____ hrs/wk
  Look for promise dates that change without anyone noticing.
- [ ] **Signed BOLs and PODs are hard to find when a dispute comes up months later.** _____ hrs/wk
  Time how long it takes to produce one from last quarter.

3. Orders and customer communication

- [ ] **Order acknowledgments are written by hand from ERP data.** _____ hrs/wk
  Count them per week, and how many go out late.
- [ ] **Missing-information emails to customers are written by hand, or skipped under deadline.** _____ hrs/wk
  Skipped questions become guessed options and returns.
- [ ] **Partial shipments and backorders cause double billing or missed invoices.** _____ hrs/wk
  Check credit memos issued for billing errors last quarter.
- [ ] **Quotes depend on one engineer or one spreadsheet.** _____ hrs/wk
  Note how long a quote waits when that person is out.

4. Data quality

- [ ] **The customer list has duplicates, and nobody trusts it.** _____ hrs/wk
  In one consolidation project, 34% of customer records were duplicates.
- [ ] **Inventory counts in the ERP regularly disagree with the shelf.** _____ hrs/wk
  At 92% accuracy on $5M of stock, about $400K of inventory is wrong in the system.
- [ ] **Item master data (units, descriptions, part numbers) is inconsistent.** _____ hrs/wk
  Inconsistent part data breaks every automation built on top of it.

5. Reporting

- [ ] **Weekly or monthly reports are built by exporting to Excel.** _____ hrs/wk
  Count the hours, and how stale the numbers are by the time they are read.
- [ ] **Meetings argue about whose number is right.** _____ hrs/wk
  Each KPI needs one written definition and one source.
- [ ] **Nobody looks at the dashboards you already have.** _____ hrs/wk
  A dashboard needs one owner and one question it answers.

6. Systems, integrations and IT

- [ ] **An integration or automation fails silently and people find out days later.** _____ hrs/wk
  Every sync should retry, log and alert someone.
- [ ] **You learn about server or disk problems when users complain.** _____ hrs/wk
  Proactive monitoring catches most issues before anyone notices.
- [ ] **Backups exist but a restore has not been tested recently.** _____ hrs/wk
  A backup you have not restored is a hope, not a plan.
- [ ] **Reps answer calls without seeing the customer's account or open orders.** _____ hrs/wk
  Phone to CRM and ERP integration puts it on screen before they answer.

Total hours a week: _____ × 52 × $_____ per hour = $_____ a year

Want a second pair of eyes? Book a free 30-minute workflow audit at **uptimizeme.com**. We'll go through this with your team and hand you a list of fixes ranked by ROI. Uptimize Solutions LLC, Chicago, IL · 312.998.9850 · info@uptimizeme.com