

Streamline → Automate → Succeed Worksheet

Simplify Your Processes, Boost Efficiency, and Maximize Results

Step 1: Choose a Process

Identify one key business process to focus on this week (e.g., order fulfillment, customer onboarding, inventory management).

Process Name: _____

Owner/Team Responsible: _____

Frequency (Daily/Weekly/Monthly): _____

Step 2: Streamline

Look at each step in the process and identify unnecessary or redundant tasks.

Step #	Task Description	Necessary? (Yes/No)	Notes / Issues Observed
1			
2			
3			
4			
5			

Reflection: Which steps can be removed, simplified, or combined?

Step 3: Automate

Identify repetitive tasks that can be automated using software, tools, or templates.

Task	Current Method	Automation Option	Expected Time Saved
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Pro Tip: Even small automation (emails, reminders, reporting) can free hours every week.

Step 4: Succeed (Standardize & Track)

Ensure the improved process is repeatable and measurable.

Step	Standardized Method	Checklist / Template	Owner	Frequency
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Reflection: How will you measure success? Example KPIs: completion time, errors reduced, customer satisfaction, cost savings.

Step 5: Track Results

After implementing improvements, monitor the process and record outcomes:

Metric	Before	After	Notes
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✓ Quick Takeaway:

By streamlining, automating, and standardizing your processes, you reduce inefficiency, free up your team, and create predictable results—turning operational headaches into growth opportunities.

