

SMB Operational Bottleneck Worksheet

Identify, Analyze, and Fix the Hidden Inefficiencies in Your Business

Step 1: Choose a Process to Analyze

Pick one process that impacts your business most (e.g., order fulfillment, customer onboarding, inventory management).

Process Name: _____

Owner/Team Responsible: _____

Frequency (daily/weekly/monthly): _____

Step 2: Map the Workflow

List every step in the process from start to finish. Be as detailed as possible.

Step #	Task Description	Responsible Person	Tools Used	Notes / Issues Observed
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1				
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2				
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3				
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4				
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5				
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Step 3: Spot the Bottlenecks

Review each step and ask:

- Does this step slow down the process?
- Are tasks being repeated or duplicated?
- Are errors or delays happening here regularly?
- Does this step require excessive approvals or waiting?

List the top 3 bottlenecks identified:

1. _____

2. _____

3. _____

Step 4: Analyze the Impact

For each bottleneck, assess the impact on:

Bottleneck	Time Lost	Money Lost	Customer Impact	Employee Stress

Reflection: How does this bottleneck affect overall operations?

Step 5: Fix & Optimize

For each bottleneck, determine a solution: simplify, automate, delegate, or remove.

Bottleneck	Solution / Action	Responsible Person	Timeline

Tip: Start with the bottleneck causing the biggest negative impact. Implement one change at a time, then measure results.

Step 6: Track Results

After implementing changes, track key performance metrics:

Metric	Before	After	Notes

✔ Quick Takeaway:

Mapping, spotting, analyzing, and fixing bottlenecks is the fastest way to scare away inefficiency and reclaim lost time, money, and productivity.