WCO Tech Audit Checklist: Exorcise Inefficiency from Your Business

Purpose: Identify opportunities to streamline workflows, reduce manual tasks, and implement technology solutions to boost efficiency and productivity.

Step 1: Identify Your Key Processes

List the main processes in your business (e.g., order fulfillment, customer onboarding, invoicing, marketing campaigns).

Process	Frequency (Daily/Weekly/Monthly)	Current Pain Points

Step 2: Spot Inefficiencies

For each process, ask:

- Are there repetitive manual tasks?
- Are mistakes or delays common?
- Is team communication clear?

Process	Inefficiency Identified	Priority (High/Medium/Low)

Step 3: Identify Technology Solutions

Consider tools or automation that could improve each process:

- **Workflow & Project Management:** Asana, Trello, ClickUp
- **Scheduling & Appointments:** Calendly, Google Calendar, Acuity
- **CRM & Customer Management:** HubSpot, Zoho, Salesforce
- **Invoicing & Accounting:** QuickBooks, Xero, Wave
- **Reporting & Analytics:** Google Data Studio, Tableau, Power BI

Process	Recommended Tech Tool	Expected Benefit

Step 4: Plan Implementation

Decide on **one process to implement a tech solution this week**.

Process	Tool Chosen	Implementation Steps	Owner	Deadline

Step 5: Track Results

After implementation, monitor improvements:

Metric	Before	After	Notes / Lessons Learned

Pro Tips:

- Start with **one process** to avoid overwhelm.
- Measure improvements in **time saved, errors reduced, and customer satisfaction**.
- Standardize what works by creating templates, checklists, and SOPs.