

# Process Assessment Tool

Our easy-to-use assessment tool is designed to help you identify and prioritise your process improvements. It's vital you complete both stages together with your team – the people using the processes will be able to identify key improvements.



## Identify your process issues

Together with your team, complete these 8 sections across your processes. We've completed an example to help you.

Process Identifier	Process Example	Process 1	Process 2	Process 3	Process 4	Process 5
1. What's the process name?	Client Onboarding					
2. What's the objective of the process?	Getting new clients added to the system					
3. When was the process last reviewed?	Sept 2022					
4. How many steps in the process? (Briefly identify them)	6 steps: 1. Gather client data 2. Establish key people 3. Identify elements of account 4. Set training programme 5. Run training Review outcomes					
5. What's the average time each step takes?	90 mins					
6. Which are the most time-consuming steps?	Creating the onboarding templates					
7. Where does the process fail?	1. Gathering the right data 2. Getting clients to participate in onboarding					
8. Is there anyone else who should be involved in reviewing the process?	New team members as and when					

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**Stage 2** **Prioritise process improvements**  
Once you've established a list of those processes causing the most issues, complete the following assessment to prioritise improvements.

Taking each process in turn, populate the columns as follows. (Again, there's an example to help you.)

- 1. List your processes** – List the processes with the most issues as identified by your team.
- 2. Score for resolving the issues** – Estimate the impact of fixing each process issue. (Score 1-5, 1 being the lowest and 5 the highest.)
- 3. Score for ease of fix** – Now rate the ease of fixing each process.
- 4. Overall score** – Calculate the overall score for each process (Impact X Ease for overall score).
- 5. Prioritise** – Now prioritise your improvements based on your scores

1. Process name	2. What's the impact if you re-solved? Rate from 1 – 5	3. How easy is the process to amend? Rate from 1 – 5	4. Calculate the overall score. (Impact x ease)	5. Prioritise your process issues based on the overall score
Client Onboarding	4	3	12	2
Sales Pipeline	5	3	15	1

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Hello

I hope you found our Process Assessment Tool useful.

Your processes are a vital part of your business. They're also dynamic, which means keeping them up to date is an ongoing exercise. Otherwise, your processes aren't pulling their weight and you'll be experiencing a variety of problems:

- your team not as productive as they could be
- sales figures falling short
- profit margins lower than forecast

Our job is to make this pain go away. Here at Wendy Johnstone Ltd we are experts at mapping processes, so we can spot straightaway where an improvement can be made. We help our clients create and maintain processes that keep pace with their business and the people working in it – whether customer-facing or back office. We do this in three easy steps. Process Deep Dive, Foundation Refresh, Process Empowerment. Then you and your team have well-defined processes that ultimately help you keep and attract valuable customers.

We hope our Process Assessment Tool has enthused you to do more with your processes. It might have made you realise you need (our) professional help. Either way, do please get in touch and **book** a discovery session with us. We'll be delighted to help you build the processes you deserve.

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You can **book** a discovery session or contact us directly: [action@wendyjohnstoneltd.co.uk](mailto:action@wendyjohnstoneltd.co.uk) / 0844 995 9976