

# PROCESS DIAGNOSTIC

Find the profit in your process

**Congratulations** on taking the time to step back and assess your business systems! Every company depends on well-run, repeatable processes. When systems are clear and consistent, you can:

- Reduce wasted time, errors, and duplicated effort
- Support your team to work independently
- Increase consistency in delivery and client experience
- Reduce stress, delegate better, and reclaim your time

However, most founders don't start with perfect systems. In fact, it's common - even expected - for processes to live in someone's head, have inconsistent results, or never get formally documented. This private, self-guided tool is designed to give you a clear snapshot of how your business is operating today and where additional process documentation can increase your profit.

---

## About This Process Diagnostic

Most business owners complete this diagnostic in about 15 – 20 minutes. No one sees your score but you. You may score high in some areas and low in others (as most do). It's not meant to audit every corner of your business, but it will highlight the areas that matter most for sustainable, scalable growth.


The tool includes 24 statements across 7 key categories:

- Culture
  - Marketing
  - Sales & Delivery
  - Customer/Client Care
  - Admin & Operations
  - Accounting & Finance
  - Team Care
- 

We believe *any* time spent reflecting on operations is time well invested. This tool is here to provide perspective, not criticism. Whatever it reveals, the next move is yours - and we're here if you want thoughtful, expert guidance at any time - for small or big questions.

*Systematically Yours,*

Dianne D. Campbell  
Founder & Principal  
Productivity Pros, LLC

 (704) 785-7007

 [ddc@yourproductivitypros.com](mailto:ddc@yourproductivitypros.com)

 [yourproductivitypros.com](http://yourproductivitypros.com)

# PROCESS DIAGNOSTIC

Find the profit in your process

## How to Use This Diagnostic

For each statement, rate how consistently and effectively it applies to your current business operations using the following scale:

Score	Meaning
0	<b>Not in Place:</b> This has not been started yet (or N/A)
1	<b>Early Stage:</b> Some awareness or discussion, but no real progress yet
2	<b>Needs Work:</b> Some progress has been made, but not yet effective
3	<b>Partially Effective:</b> Working in some situations, but not consistently
4	<b>Effective:</b> Works well in most situations - but a few gaps remain
5	<b>Best Practice:</b> No improvements needed

You'll total the points at the end of each section and calculate your final score out of 125.

Together, these scores will show you how effectively your operations are supporting consistency, scalability, and sustainable growth.

## Section 1: Culture\*

Score each statement from 0–5

Your Score	Statement
	Our company Vision is in writing and regularly referenced to guide decisions and focus.
	Our Mission is clearly written and is used to shape how daily work is prioritized and performed.
	Our Core Values are in writing and actively guide team behavior and company culture.

Subtotal: \_\_\_\_\_ / 15

*\*Note: If you score low in the Culture section, you're not alone. Many founders haven't yet put focused energy into documenting mission, vision, or values. But this foundational work can transform how your business operates. We routinely provide strategic guidance in this area, so your culture becomes a practical framework for decision-making, accountability, and alignment.*

# PROCESS DIAGNOSTIC

## Find the profit in your process

### Section 2: Marketing

Your Score	Statement
	Our marketing activities are supported by documented processes and assigned routine tasks.
	We track marketing performance through scheduled check-ins or automated tools that monitor results.

Subtotal: \_\_\_\_\_ / 10

### Section 3: Sales & Delivery

Your Score	Statement
	Our process for creating products or services is well documented and repeatable.
	Our delivery process is clearly outlined and followed consistently by the team.
	We have a documented follow-up process to encourage repeat business.
	Leads are handled consistently across all channels (email, phone, Slack, website, etc.) via a defined workflow.
	We use a consistent process to convert leads into clients/customers across the team.
	Our onboarding process is smooth and consistent, with high satisfaction rates confirmed by feedback.

Subtotal: \_\_\_\_\_ / 30

# PROCESS DIAGNOSTIC

## Find the profit in your process

### Section 4: Customer / Client Care

Your Score	Statement
	Our documented service process includes clear escalation criteria and a reporting system that surfaces client issues early without creating a culture of fear or blame.
	Our customer support processes are reviewed regularly and improved as needed.
	We collect and use customer/client feedback to inform service improvements.

Subtotal: \_\_\_\_\_ / 15

### Section 5: Admin & Operations

Your Score	Statement
	Our business processes are well documented, centrally stored, and accessible to the team.
	Email is managed efficiently using templates, filters, and guidelines - staff inboxes are consistently under control.
	Our workspace, tools, and resources are maintained through routine checklists or calendar-based reminders that ensure regular upkeep.

Subtotal: \_\_\_\_\_ / 15

# PROCESS DIAGNOSTIC

## Find the profit in your process

### Section 6: Accounting & Finance

Your Score	Statement
	We have documented routines to set and review budgets and track financial performance regularly.
	Payment and refund processes are documented and as automated as possible.
	Our accounting workflows are clearly defined, securely stored, and supported by automation.

Subtotal: \_\_\_\_\_ / 15

### Section 7: Team Care

Your Score	Statement
	Our onboarding process includes a resource kit with the tools and templates new hires need.
	Staff manage their work using a task management tool with clear responsibilities and statuses.
	Our systems enable team members to work independently and solve problems with minimal oversight.
	We have a documented system for staff recognition, development, and ongoing support.
	We have a documented process for employees to raise concerns - whether the issue is related to operations, work, workload, team dynamics, or personal challenges - so they know who to speak with and how to initiate that conversation.

Subtotal: \_\_\_\_\_ / 25

# PROCESS DIAGNOSTIC

## Find the profit in your process

### Score Summary

Section	Subtotal
Culture	/ 15
Marketing	/ 10
Sales & Delivery	/ 30
Customer/Client Care	/ 15
Admin & Operations	/ 15
Accounting & Finance	/ 15
Team Care	/ 25
<b>Total</b>	<b>/ 125</b>

## What Your Score Means

### 100 – 125: System Superstar

You're running a streamlined, scalable business. Your systems reduce friction, empower your team, and support consistent client delivery. You've likely already seen the payoff in staff confidence, client satisfaction, and profit margins. Keep building on this solid foundation.

### 80 – 100: Strong Performer

Your business is operating well in many areas, but some processes may still live in someone's head or get handled inconsistently. With a little more structure, you'll unlock time savings, easier delegation, and a stronger customer experience.

# PROCESS DIAGNOSTIC

Find the profit in your process

## 60 – 80: Time to Tune Up

You've built a business that works, but it might rely heavily on you or a few key players. Delegation may be difficult, and inefficiencies are probably eating into profits. Documenting core processes could dramatically reduce stress and increase stability.

## 40 – 60: Signs of Strain

You're likely feeling the pressure of inconsistent systems. Delegation, growth, and even day-to-day delivery may feel harder than they should. The good news? With a focused systems approach, these issues are solvable, and often faster than expected.

## 0 – 40: In the Red Zone

Your business might be running on hustle instead of systems, and it's costing you. Fires are frequent, tasks fall through the cracks, and growth feels out of reach. But you don't have to stay in firefighting mode. Even one well-built system can create immediate relief.

---

### Want to turn insight into action?

If this diagnostic gave you clarity, or surfaced areas that need more structure, we would be glad to talk it through with you.

[Book your complimentary 30-minute strategy call.](#)

Let's find the profit in your process!

---



PRODUCTIVITY helps small business owners increase profits by improving how their business runs behind the scenes. Our team of process professionals help small businesses organize their operations and build efficient delegation systems. We turn operational friction into smooth, scalable systems that eliminate bottlenecks, prevent burnout, and support sustainable growth. PRODUCTIVITY is a trusted partner to founders who are ready to scale. [linkedin.com/in/ddcampbell](https://www.linkedin.com/in/ddcampbell)

