

FREE / SMALL-BUSINESS WORKFLOW QUICK CHECK

Find one workflow worth fixing

Start with a recurring task

Choose one: new inquiries, appointment preparation, estimate follow-ups, task assignment or weekly status review. Avoid trying to redesign your entire business at once.

Check the basics

Mark YES or NO for each statement.

1. New requests are recorded in one approved place.
2. Every open request has one named owner.
3. Each request has a written next action and due date.
4. We ask for essential information before promising delivery.
5. A person accepts each task handoff.
6. We know when a request is complete.
7. Exceptions and complaints have an escalation owner.
8. We review overdue work at least weekly.

Choose your starting point

Count the NO answers. This is a planning checklist, not a validated assessment. Pick one NO that causes repeated work or missed follow-through. If all are YES, inspect a few recent cases to see whether practice matches the process.

Keep AI use deliberate

Draft with invented or de-identified examples in approved tools. Check every fact and commitment before sending anything. A simple checklist may solve the problem without AI or new software.

FREE / YOUR ACTION SHEET

Make one improvement this week

Name the work

Workflow: _____
Trigger: _____
Owner: _____
Finished means: _____

Write the next three steps

1. _____
2. _____
3. _____
If blocked, contact: _____

Measure before changing

Review five comparable recent cases. Record active work minutes, missed next steps or repeat clarification requests. Choose one measure and use the same definition during your pilot.

Run a small test

Problem observed: _____
One change to try: _____
Start date: _____ Review date: _____
Measure: _____ Result: _____
Decision: Keep / Simplify / Stop

Want the complete templates?

The NORMORA AI Workflow Starter Kit adds an inquiry SOP, five customer messages, a handoff card, five AI drafting prompts, a weekly review and a seven-day rollout. Ask about availability at admin@normoraai.com. No purchase is needed to use this free checklist.

About this resource

Original practical templates from NORMORA AI. This resource does not install automation, certify compliance or promise time savings. Use it with your own business policies and approved systems. normoraai.com