

COST REVIEW CHECKLIST

Spot inefficiencies. Map your processes. Find quick wins.

1. START WITH THE BASICS

- List your key processes (e.g. billing, onboarding, claims)
- Identify who owns each one
- Note what systems are used—and where spreadsheets still sneak in

2. MAP WHAT'S REALLY HAPPENING

- Map out the as-is process: every step, every handoff
- Highlight where delays, confusion, or double-work happen
- Ask: "Why does this step exist?" If there's no clear reason, it's waste

3. LOOK FOR THE CLASSIC COST KILLERS

- Manual data entry
- Email approvals and sign-offs
- Rework (fixing the same issue more than once)
- Workarounds or shadow systems (like side Excel files)

4. ASK THE RIGHT QUESTIONS

- Where is time being lost?
- What creates the most complaints?
- What tasks could be automated?
- What reports are taking too long to pull?

5. GET INPUT FROM THE FRONT LINE

- Run a quick feedback session or survey
- Ask staff: "What's one process that wastes your time?"
- Capture improvement ideas directly from the people doing the work

COST REVIEW CHECKLIST

Spot inefficiencies. Map your processes. Find quick wins.

6. IDENTIFY QUICK WINS

- Can you automate any manual steps?
- Can you standardise inputs or forms?
- Can you shorten approval chains?
- Can you eliminate redundant reports?


7. PRIORITISE AND ACT

- Pick 1–3 high-impact, low-effort changes
- Assign an owner
- Set a simple timeline to test and implement

Pro Tip:

Start small, fix fast, and build momentum. Improvement doesn't need to be complex—it just needs to start.

Need help mapping or improving your processes?

 Book a free 30-min consultation:

<https://calendly.com/robertchapman/initial-conversation/>

 Or email: robertchapman02@gmail.com