



Praxistra

PRACTICAL BUSINESS CHECKLIST

Where is your business losing time?

A practical 10-minute business-friction checklist for Australian small businesses.

Small-business friction is rarely one dramatic problem.

It is usually a collection of repeated tasks, unclear handovers, scattered knowledge and workarounds that quietly consume time and make service less consistent.

What this checklist does

It helps you identify where friction is most visible, choose one priority and define a practical next step. It is a guide for reflection—not a formal audit, diagnosis or guarantee of results.

How to use it

1

Answer honestly

Use what happens most weeks—not how the process is meant to work.

2

Add each section

The highest section score usually points to the best place to investigate first.

3

Choose one next step

Start small, make ownership clear and decide how you will know whether it helped.

Allow about 10 minutes. You do not need perfect information to begin.

Practical AI, systems and decisions for small business.

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THE CHECKLIST

Rate the friction you see in everyday work.

Use the last four to eight weeks as your reference point. If an item genuinely does not apply, score it 0.

Rate each statement: 0 Never or not relevant • 1 Sometimes • 2 Often • 3 Regularly or significantly

1 Repetitive administration

Look for repeated manual effort that adds little value or depends on one person remembering every step.

Statement	0	1	2	3
1. Staff regularly re-enter the same information into more than one system or document.	☐	☐	☐	☐
2. Routine work depends on copying, pasting, chasing or manually checking information.	☐	☐	☐	☐
3. The same questions, approvals or status requests interrupt people throughout the week.	☐	☐	☐	☐
4. Important recurring tasks rely on memory rather than a clear trigger, list or routine.	☐	☐	☐	☐

Repetitive administration score: ____ / 12

2 Customer response and handovers

Consider what customers experience when work moves between people, inboxes or systems.

Statement	0	1	2	3
1. Customer enquiries wait because ownership is unclear or the right person is unavailable.	☐	☐	☐	☐
2. Different staff give noticeably different answers or service experiences.	☐	☐	☐	☐
3. Customers need to repeat information because handovers are incomplete.	☐	☐	☐	☐
4. The team spends time checking who is doing what or whether a customer has been updated.	☐	☐	☐	☐

Customer response and handovers score: ____ / 12

THE CHECKLIST

Find where knowledge, tools and ownership break down.

Rate each statement: 0 Never or not relevant • 1 Sometimes • 2 Often • 3 Regularly or significantly

3 Knowledge and consistency

Look at how easily staff can find and apply the business's practical know-how.

Statement	0	1	2	3
1. Key procedures or answers are scattered across emails, documents, chats or individual memory.	☐	☐	☐	☐
2. New or less experienced staff need to ask someone how routine work should be done.	☐	☐	☐	☐
3. Instructions exist, but they are outdated, difficult to find or not followed consistently.	☐	☐	☐	☐
4. A small number of people hold knowledge that would be difficult to replace or transfer.	☐	☐	☐	☐

Knowledge and consistency score: ____ / 12

4 Tools and workarounds

Consider whether current software supports the work—or whether people work around it.

Statement	0	1	2	3
1. Staff use spreadsheets, personal notes or side systems because the main tool does not fit the work.	☐	☐	☐	☐
2. Existing software has useful features that the business rarely or inconsistently uses.	☐	☐	☐	☐
3. Tools do not share information cleanly, creating duplicate work or gaps.	☐	☐	☐	☐
4. The business is considering another tool before clearly defining the problem it should solve.	☐	☐	☐	☐

Tools and workarounds score: ____ / 12

THE CHECKLIST

Check whether priorities and ownership are clear.

Rate each statement: 0 Never or not relevant • 1 Sometimes • 2 Often • 3 Regularly or significantly

5 Ownership and improvement

Look at how the business chooses, owns and sustains improvements.

Statement	0	1	2	3
1. Tasks or decisions stall because responsibility is shared, assumed or unclear.	☐	☐	☐	☐
2. The owner or one senior person becomes the default answer, approver or problem-solver.	☐	☐	☐	☐
3. The business has more improvement ideas than it can realistically prioritise or complete.	☐	☐	☐	☐
4. Changes begin with enthusiasm but fade because ownership, follow-up or measures are unclear.	☐	☐	☐	☐

Ownership and improvement score: ____ / 12

Your section scores

Area	Score	Priority rank
Repetitive administration	____ / 12	____
Customer response and handovers	____ / 12	____
Knowledge and consistency	____ / 12	____
Tools and workarounds	____ / 12	____
Ownership and improvement	____ / 12	____

Overall score: ____ / 60

MAKE SENSE OF THE RESULT

Use the score to choose where to look—not to label the business.

A higher score does not automatically mean you need new software or AI. It means the area deserves a closer look. The best response may be a clearer process, better ownership, improved use of an existing tool, a template, training or a carefully controlled automation.

0–15**Limited visible friction**

Most areas appear reasonably controlled. Focus on the highest section score and prevent small issues from becoming habitual.

16–30**Some recurring friction**

There are likely several avoidable drains on time or consistency. Choose one area with a clear owner and a manageable first change.

31–45**Significant friction**

Repeated problems are likely affecting staff time, service or confidence. Map the current work before deciding on tools or automation.

46–60**High visible friction**

Friction appears widespread or frequent. Avoid trying to fix everything at once. Establish priorities, ownership and a staged improvement plan.

Read section scores before the total

Two businesses can have the same overall score for very different reasons. Your highest section score is generally more useful than the total because it points to the most visible source of friction.

Before buying another tool

Write down the exact problem, who experiences it, how often it occurs and what a better result would look like. Then check whether a clearer process or better use of an existing tool could solve it first.

YOUR NEXT PRACTICAL STEP

Turn one friction point into a small, controlled improvement.

Choose one issue from your highest-scoring section. Keep the first step narrow enough to test and learn from.

1. The friction to address

What happens now? Describe one recurring example rather than a broad complaint.

2. Why it matters

Who loses time, experiences delay or receives inconsistent service?

3. The likely cause

What appears to create the issue: unclear ownership, missing information, an awkward process, tool limitations or something else?

4. One practical change to test

What is the smallest useful change you could introduce without creating unnecessary complexity?

5. Ownership and timing

Who will own the test, and when will it begin and be reviewed?

6. How you will judge it

What simple evidence would show whether the change helped?

Need a clearer view of the problem?

Praxistra develops practical resources, assessments and support to help small businesses understand friction, choose an appropriate response and put improvements into practice.

[Visit praxistra.com](https://praxistra.com)

Important note

This checklist provides general educational information. It does not replace professional legal, financial, technology, employment or other advice specific to your circumstances. Scores are indicative prompts for discussion, not diagnostic findings.