

# The 5-Minute Workflow Leak Audit

---

For B2B Founders & Agency Owners

By Kelly Ooi | Ops Clarity

---

## Why You Need This

---

Your team is busy, but nothing actually moves. You've bought the tools, hired the people, but work still gets stuck.

The problem isn't the tools. It's the **handoffs**.

When work moves from Person A to Person B, or Tool X to Tool Y, ownership drops. That's where time and money leak.

Use this 10-question audit to find exactly where your operations are bleeding hours.

---

## The Audit: Find Your Leaks

---

Answer **Yes** or **No** to the following questions:

### Section 1: The "I Thought You Were Doing It" Leaks

1. When a new client signs, does someone have to manually copy their data from the contract/payment processor into your CRM or project management tool?
  - Yes (Leak)
  - No
2. Do team members frequently ask "What's the status of X?" in Slack/Teams because they can't find it themselves?
  - Yes (Leak)
  - No

3. When a task is completed, does the person who finished it have to manually notify the next person in line?

Yes (Leak)

No

## Section 2: The “Where Is That File?” Leaks

1. Are client assets (logos, copy, logins) scattered across email threads, Slack DMs, and different Google Drive folders?

Yes (Leak)

No

2. Does your team spend more than 15 minutes a day searching for information they need to start a task?

Yes (Leak)

No

3. If your key operator went on vacation tomorrow, would the rest of the team know exactly where to find the standard operating procedures (SOPs)?

Yes (Leak)

No

## Section 3: The “Tool Fatigue” Leaks

1. Are you paying for software subscriptions that your team rarely uses, or uses only 10% of the features?

Yes (Leak)

No

2. Do you have tools that *should* talk to each other (e.g., Calendly and your CRM) but currently require manual data entry to sync?

Yes (Leak)

No

3. Is your team resistant to adopting new tools because “the old way is faster”?

Yes (Leak)

No

## Section 4: The Ultimate Litmus Test

1. Can you confidently step away from your business for a week without operations grinding to a halt?

- Yes
  - No (Major Leak)
- 

## Your Score

---

Count your “Yes” answers:

- **0-2 Yes:** Your workflows are tight. You’re ready to scale aggressively.
  - **3-5 Yes:** You have moderate leaks. You’re probably losing 5-10 hours a week to manual friction. Fixing these will give you immediate breathing room.
  - **6+ Yes:** Your operations are actively bottlenecking your growth. You are likely losing 15+ hours a week and risking team burnout.
- 

## The Fix: Stop the Bleeding

---

You don’t need more tools. You need **clarity**.

### Step 1: Map the Reality, Not the Theory

Don’t map how the process *should* work. Map how it *actually* works right now. Include every manual copy-paste, every Slack DM, every workaround.

### Step 2: Define the Handoffs

For every step in the process, define:

- **Who** owns it?
- **What** is the exact output required?
- **How** is the next person notified?

## Step 3: Automate the Friction, Not the Thinking

Only automate the repetitive, low-value tasks (data entry, notifications, syncing). Leave the high-value work (strategy, client communication, creative) to humans.

---

## Ready to Stop the Leaks?

---

If you scored 3 or higher, you're losing time you can't afford.

I help B2B founders and agency owners fix messy workflow handoffs so things stop falling through the cracks. No new tools. Just making the ones you already pay for actually talk to each other.

**Get a Free 48-Hour Workflow Teardown:** Tell me what's breaking. I'll send you a clear breakdown of where time and money are leaking—within 48 hours. No call needed.

👉 [Get Your Free Teardown at opsclarity.net](https://opsclarity.net)