



# Business Optimization Worksheet

Use this worksheet to systematically review and improve your business processes. Check off each step as you complete it.

**1 Identify Key Processes**

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List all critical business processes and prioritize them based on impact and frequency.

**2 Map Current Workflows**

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Create detailed flowcharts to visualize each process, highlighting inputs, outputs, and decision points.

**3 Analyze for Inefficiencies**

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Examine workflows to identify bottlenecks, redundancies, and non-value-adding activities.

**4 Set Clear Objectives**

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Define SMART (Specific, Measurable, Achievable, Relevant, Time-bound) goals for each process improvement initiative.

**5 Engage Stakeholders**

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Involve team members from relevant departments to gather insights and foster collaboration.

**6 Implement Incremental Changes**

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Apply small, manageable adjustments to processes, monitoring their effects before full-scale implementation.

**7 Monitor KPIs**

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Establish Key Performance Indicators (KPIs) to measure the effectiveness of changes (e.g., cycle time, error rates, customer satisfaction).

**8 Provide Training and Resources**

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Ensure staff are equipped with the necessary skills and tools to adapt to new processes.

**9 Review and Refine Regularly**

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Schedule periodic evaluations to assess process performance and make continuous improvements.

**10 Integrate the 5x7=1 Framework**

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Align daily actions across the seven key business domains with one primary goal, ensuring small steps contribute to overarching business objectives. (See next page for framework.)



# The 7 Pillars of Business

## 1. Business Management

- What is the Business? (Define who, what, where, and why)(does the name reflect this)
- What style of leadership will you use? (hands off or on (define))
- What will each personal role be? (Define specifically)
- What outcome do you want for the business? (Why did you start / buy the business?)

## 2. Financial Framework

- What are our streams of income (can there be more?)
- What or where did our Capital come from, and how much?
- What are we investing in to ensure the company is sustainable? (what return?)
- How much will we save for emergencies (back up capital)?
- How much will we put away each month in a savings account? (what is its purpose?)
- What are ALL of our expenses? (capital, supplies, equipment, loan(s)) How often?
- What is the total payroll and how to maintain it? (growth / decline / bonuses / increases)

## 3. Human Resources

- How many employees do we need to operate efficiently, profitably? (if we scale?)
- What can we delegate or farm out? (is it more profitable than employees?)
- What talent / roles do we need to operate efficiently, profitably?
- How do we attract the best talent?
- How do we keep this talent?
- How do we take care of this talent, team build, create culture, have fun?
- How do we make our talent feel valued, appreciated, and well compensated?

## 4. Business Processes

- What outcome do we want from our services, products?
- What systems will help streamline the processes to reach this outcome?
- What processes do we need to adopt to ensure each team member can be efficient and profitable to the outcome desired?
- What does the outcome do for our customers and customer service?

## 5. Business Health

- What does this business look like when it is healthy?
- What do our employees look like in this healthy environment?
- What are our performance metrics we wish to follow and track?
- How do we keep the company healthy during the ebb and flow of business seasons?
- How do we keep the company healthy during an emergency or crisis?

## 6. Marketing, Sales, and Customers

- Who is our ideal customer? (\*define this specifically) (you can then say no at the right time)
- What market contains our ideal customer? (are there multiple markets?)
- What are our products and services? (define)
- How do we connect the customer with our products / services? (Make sales)
- What does an ideal sale look like? (one time or repeat / average ticket amount)
- How do we attract our ideal customer? Marketing
- How will our ideal customer connect with us? (brick mortar, online, social, phone etc)

*(See next page for final part of framework...)*

## 7. Sustainability

- What are the risks to this business? (what could make it fold?)
- What are risks to our supply?
- What are risks to customer relations?
- What are risks to production?
- What are risks to talent retention?
- How will we maintain our supply chain? (do we need to diversify?)
- How will we maintain product development / management?
- How will we maintain a stable cash flow regardless of external issues?
- How will we maintain a healthy environment to minimize internal issues?
- What is the sellability of the enterprise as a whole? (what do we need to do to make it sellable?) this will make it sustainable.
- What do we want to do in the realm of contribution to community? What does our ideal means of contribution look like? Who will we contribute to?

## 5x7=1 Framework

From the "Reclaim Your Life" book, the 5x7=1 Framework is a core transformational tool structured as:

- **7 Areas of Life:** These are the seven key business domains described above.
  - **5 Daily Action Steps:** Commit to taking at least five positive, intentional steps every day toward your identified goals. These actions can be small but must directly support your overall progress.
  - **1 Priority Goal:** Among all goals, identify one major goal to prioritize – the "One Goal" that will act as a catalyst, unlocking or accelerating progress across all seven areas of business. This helps focus attention, avoid overwhelm, and will generate momentum.
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All of the content in this worksheet are parts of courses and strategic sessions offered by FJG Success Development. Contact us for more information. Book Frederick for your next strategic planning session.

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