Workplace Task Fix Planner

The problem: work piles up, lives in one person's head, and gets done differently every time. The fix: find the tasks eating your week, hand off the right ones, and write them down so anyone can repeat them.

Step 1. Audit where the time goes

For each area, estimate weekly hours and who handles it. Tick Delegate if someone else could do it. Tick Needs SOP if it is not written down.

Task area	Hrs/wk	Who does it now	Delegate	Needs SOP
Email and inbox management			☐	☐
Calendar and appointment scheduling			☐	☐
Client follow-ups			☐	☐
Data entry and organization			☐	☐
Invoicing and billing support			☐	☐
CRM updates			☐	☐
Phone and customer support			☐	☐
Report preparation			☐	☐
Product or market research			☐	☐
E-commerce admin (listings, orders)			☐	☐
Social media posting and engagement			☐	☐
General admin (filing, scheduling)			☐	☐
Workflow clean-up and tracking			☐	☐
Other:			☐	☐

Total hours per week on admin:

Rule of thumb: delegate tasks that repeat, follow clear rules, and do not need your personal judgement. Keep tasks that build relationships or need your decisions.

Step 2. Pick your top 3 fixes

Choose the three ticked tasks that cost the most time or cause the most mistakes.

	Task	Why it matters (time lost, errors, delays)
1		
2		
3		

Step 3. Write the SOP (one per fix)

A good SOP lets a new person do the job correctly without asking you. Copy this page for each fix.

Process name

Owner and backup person

Trigger: what starts this task, and how often?

Tools, logins and templates needed (never write passwords here)

Steps, in order (one action per line)

What done looks like (how to check the result)

Common mistakes and what to do when something goes wrong

Last reviewed on

Step 4. Hand it off cleanly

Tick each item before the task changes hands.

- [ ] Steps written and tested by someone other than the author
- [ ] Templates, checklists and example outputs saved in one shared place
- [ ] Access given to the right tools, with least access needed
- [ ] Deadline, quality standard and who to ask for help are clear
- [ ] First 2 runs reviewed together, with feedback given the same day
- [ ] Backup person named so work never stops when someone is away

Step 5. Your 30-day plan

Week 1: Audit and choose

Week 2: Write the SOPs

Week 3: Hand off and review

Week 4: Measure and adjust

Step 6. Check it worked

Compare to Step 1 after 30 days.

Hours saved per week

Mistakes or missed deadlines this month, compared to last

Next process to document

Prepared by / contact: