

Work Management Clarity Checklist

A Self-Audit for Teams Who Want to Work Smarter

Use this checklist to identify where your team is thriving and where clarity may be missing. Unchecked boxes highlight areas that could benefit from support. Refer to the bulleted lists for potential solutions and next steps.

PEOPLE & ALIGNMENT

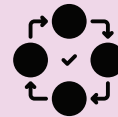
- We're aligned on how we prioritize work and make decisions
- Expectations are documented, not just assumed
- Collaboration flows well across teams and departments, no silos or bottlenecks
- Communication is purposeful, not just noisy



- Team coaching and leadership training
- Change management strategies
- Role clarity workshops or RACI modeling

PROCESS & WORKFLOW

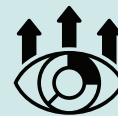
- We have consistent systems for planning, tracking, and reviewing work
- Meetings are intentional and actionable, not just status updates
- Everyone knows *where* work happens (no jumping between five platforms for one task)
- We review and improve our workflows regularly, not just when something breaks
- Our processes support both accountability and flexibility



- Workflow optimization consulting
- Standard operating procedures development
- Platform implementation or tool consolidation

VISIBILITY & EXECUTION

- It's easy to see what's in progress, what's stuck, and what's done
- Deadlines, deliverables, and next steps are clearly defined
- Leadership has visibility into work without micromanaging
- We can trust our reports, dashboards, or overviews; they're not last-minute mashups
- We can quickly identify what's working and what's not



- Dashboard/reporting setup in Power BI or other tools
- Portfolio and PM tool configuration
- Project controls and status tracking solutions

CAPACITY & SUSTAINABILITY

- Our team isn't constantly stretched thin or working in survival mode
- We're not reinventing the wheel each time we start something new
- We make time to reflect, learn, and improve, not just execute
- We know what success looks like, and we're moving toward it
- We're open to support, tools, or outside expertise when we need it



- Resource and capacity planning tools
- Workload balancing strategies
- Process maturity assessments and strategic planning

Need Work Management Support?

We help organizations implement smarter systems, improve processes, and build sustainable work habits. From training & coaching to tool implementation & ongoing consulting, we tailor solutions to your needs.

Book a free consultation to explore what's possible for your organization.