



GROWTH AND PLANNING

Workflow maturity assessment

A self-assessment for identifying whether client workflows are improvised, repeatable, visible, measured, or ready to improve.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

You need a clear starting point before changing tools or processes.

WORK THROUGH THE CHECKLIST

- ☐ 01 **Assess client intake**

- ☐ 02 **Assess delivery visibility**

- ☐ 03 **Assess approvals**

- ☐ 04 **Assess billing handoff**

- ☐ 05 **Assess learning loops**

- ☐ 06 **Choose the weakest link**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.

This practical workflow resource is not legal, financial, tax, or security advice. Adapt it to your team and circumstances.