

Operational Readiness Assessment



Figure 1: Building operational excellence through strong leadership and systems

Is Your Business Ready to Scale, Sell, or Run Without You?

Use this comprehensive assessment to evaluate your business's operational readiness. Understanding where you stand today is the first step toward building a more valuable, sustainable, and transferable enterprise.

How to Use This Assessment

For each of the 15 statements below, select the rating that best reflects your current business situation. Be honest in your evaluation—this assessment is designed to identify opportunities for improvement and celebrate your strengths.

Rating Scale:

- 1 Not at all true
 - 2 Slightly true
 - 3 Somewhat true
 - 4 Mostly true
 - 5 Very true
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Assessment Questions

Leadership & Independence

My business can operate effectively without my direct involvement.

- 1 - Not at all true
- 2 - Slightly true
- 3 - Somewhat true
- 4 - Mostly true
- 5 - Very true

I have a leadership or management team that makes decisions independently.

- 1 - Not at all true
- 2 - Slightly true
- 3 - Somewhat true
- 4 - Mostly true
- 5 - Very true

I can take an extended vacation without disrupting the business.

- 1 - Not at all true
- 2 - Slightly true
- 3 - Somewhat true
- 4 - Mostly true
- 5 - Very true

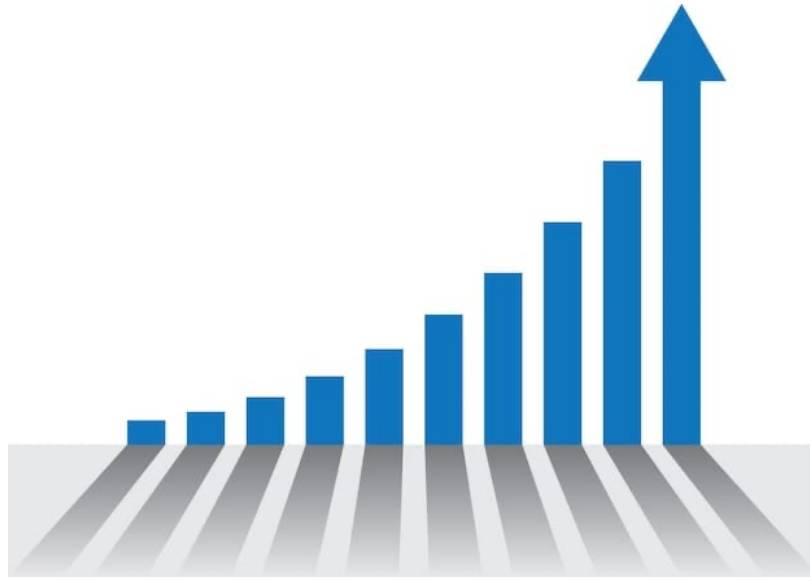


Figure 2: Operational excellence drives sustainable business growth

Systems & Processes

Key business processes are documented and consistently followed.

- 1 - Not at all true
- 2 - Slightly true
- 3 - Somewhat true
- 4 - Mostly true
- 5 - Very true

Technology systems are reliable, secure, and support business operations well.

- 1 - Not at all true
- 2 - Slightly true
- 3 - Somewhat true
- 4 - Mostly true
- 5 - Very true

The business has repeatable systems and is not overly reliant on custom, ad hoc work.

- 1 - Not at all true
- 2 - Slightly true
- 3 - Somewhat true
- 4 - Mostly true

- 5 - Very true
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Financial Management

Financial reports are accurate, timely, and easily understood by outside stakeholders.

- 1 - Not at all true
- 2 - Slightly true
- 3 - Somewhat true
- 4 - Mostly true
- 5 - Very true

We track and use key performance indicators (KPIs) to guide decisions.

- 1 - Not at all true
 - 2 - Slightly true
 - 3 - Somewhat true
 - 4 - Mostly true
 - 5 - Very true
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Organizational Structure

We have a clear organizational chart and role definitions.

- 1 - Not at all true
- 2 - Slightly true
- 3 - Somewhat true
- 4 - Mostly true
- 5 - Very true

Our employee onboarding, training, and performance systems are clearly defined.

- 1 - Not at all true
- 2 - Slightly true
- 3 - Somewhat true
- 4 - Mostly true
- 5 - Very true



Figure 3: Data-driven operations create transparency and accountability

Customer & Revenue Diversification

Customer relationships are handled by team members other than me.

- 1 - Not at all true
- 2 - Slightly true
- 3 - Somewhat true
- 4 - Mostly true
- 5 - Very true

Our revenue streams are diversified and not dependent on a few key clients.

- 1 - Not at all true
- 2 - Slightly true
- 3 - Somewhat true
- 4 - Mostly true
- 5 - Very true

Strategic Planning & Succession

There is a plan in place to address unexpected owner absence or departure.

- 1 - Not at all true
- 2 - Slightly true
- 3 - Somewhat true

- 4 - Mostly true
- 5 - Very true

We have identified growth opportunities and have the capacity to pursue them.

- 1 - Not at all true
- 2 - Slightly true
- 3 - Somewhat true
- 4 - Mostly true
- 5 - Very true

We have a succession or transition plan for the leadership team.

- 1 - Not at all true
- 2 - Slightly true
- 3 - Somewhat true
- 4 - Mostly true
- 5 - Very true

Your Operational Readiness Score

Calculate your total score by adding the ratings from all 15 questions (possible range: 15-75 points).

Score Range	Operational Readiness Level
60-75 points	Highly Ready: Your business demonstrates strong operational independence. You're well-positioned to scale, pursue acquisition opportunities, or prepare for a strategic exit. Continue refining your systems and documenting institutional knowledge.
45-59 points	On the Right Track: You've built a solid foundation, but some critical areas need attention before a major transition. Focus on strengthening leadership autonomy, process documentation, and strategic planning.
30-44 points	Significant Improvement Needed: Your business likely depends heavily on you for daily operations and key decisions. Prioritize building management capacity, systemizing operations, and diversifying customer relationships.
Below 30 points	Owner-Dependent: The business is currently inseparable from your personal involvement. A structured operational transformation is essential before considering growth initiatives, acquisitions, or exit strategies.

Table 1: Operational Readiness Evaluation Matrix

Next Steps: Building Operational Excellence

Regardless of your score, Fraction Forward can help you strengthen operational capabilities and increase business value:

- **Process Documentation & Systematization** - Transform tribal knowledge into repeatable systems
 - **Leadership Development** - Build management capacity and decision-making autonomy
 - **Financial Infrastructure** - Implement KPI tracking and stakeholder-ready reporting
 - **Strategic Planning** - Develop succession plans and growth roadmaps
 - **Technology Optimization** - Leverage systems that reduce owner dependency
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About Fraction Forward

Fraction Forward partners with business owners to build operationally excellent, scalable enterprises. Whether you're preparing to scale, evaluating acquisition opportunities, or planning an eventual exit, we provide the fractional leadership and strategic guidance to transform your business into a valuable, transferable asset.

Ready to take the next step?

Contact us to discuss your assessment results and explore how we can help you achieve operational independence.

Fraction Forward

Building Business Value Through Operational Excellence
