

OPERATIONS HEALTH CHECK

Identify your biggest operational gap in under 3 minutes.

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HOW TO SCORE: Check YES or NO for each question. Count your YES answers per pillar. Your LOWEST score = where to start first.

PEOPLE

1

- YES NO Does every person on your team have a clearly defined role and responsibility?
- YES NO Do you have a documented onboarding process for new hires or contractors?
- YES NO Can your business operate for a full day without you making every decision?

MY SCORE
__ / 3

PROCESS

2

- YES NO Are your most important business processes documented and accessible to your team?
- YES NO When something goes wrong, do you have a documented way to identify and fix it?
- YES NO Could a new team member follow your processes without asking you a dozen questions?

MY SCORE
__ / 3

SYSTEMS

3

- YES NO Do you use a CRM or organized system to track your leads and clients?
- YES NO Are your business tools working together or working against each other?
- YES NO Could your team access everything they need if you were unreachable for a week?

MY SCORE
__ / 3

COMMUNICATION

4

- YES NO Does your team know how and when to communicate internally and with clients?
- YES NO Do your clients consistently receive the same experience regardless of who helps them?
- YES NO Do you have a documented way to handle common client questions or complaints?

MY SCORE
__ / 3

METRICS

5

- YES NO Do you track at least 3 key performance indicators (KPIs) in your business regularly?
- YES NO Do you review your business numbers on a weekly or monthly basis?
- YES NO Do you make decisions based on data rather than gut feeling alone?

MY SCORE
__ / 3

SCORING GUIDE:

3 / 3

Solid. Keep it up.

2 / 3

Gaps exist. Worth attention.

1 / 3

Needs real work. Prioritize.

0 / 3

Costing you time & money now.