

Operations and Planning Readiness Assessment

Name _____
Email _____

Date _____
Role _____

This assessment identifies strengths and the gaps limiting your results. Rate each area from 1 to 5. A score below 60 signals performance-limiting gaps; a section score below 12 signals a concentrated gap. Your individual responses are confidential. Return your assessment to michael@mryangroup.com for a written summary of your scores and key gaps.

Scoring

- 1- No Process:** No defined structure or ownership; decisions are reactive and inconsistent.
- 2- Ad Hoc Process:** Some effort or awareness exists, but execution depends on individuals, not systems.
- 3- Defined Process:** The process is documented and followed, but it is not yet fully cross-functional or disciplined.
- 4- Consistent Process, Inconsistent Results:** Process is active and consistent, but outcomes are inconsistent.
- 5- Process, Measurable Results:** Process consistently delivering financial and operational results.

LEADERSHIP & ALIGNMENT

Score

Executive Ownership	Do senior leaders actively drive and support the planning process?	
Shared Forecast	Do Sales, Operations, and Finance operate from one shared forecast?	
Accountability for Metrics	Are owners clearly assigned and accountable for closing performance gaps?	
Planning Horizon	Does planning extend beyond the current quarter with a rolling forecast?	
Cross-Functional Decisions	Are tough trade-offs made in planning meetings, not around them?	
Leadership & Alignment Score		

PROCESS DISCIPLINE & CADENCE

Score

Process Discipline	Are supply, demand, and financial risks identified and mitigated proactively?	
Cadence Discipline	Does the business follow a consistent, structured monthly planning cadence?	
Forecast Credibility	Are major demand changes vetted and documented before they are acted on?	
Resource Constraints	Do planning decisions reflect labor, capacity, and supplier constraints?	
Process Governance	Is planning executed with the same rigor and priority as financial reviews?	
Process Discipline & Cadence Score		

INSIGHT & INTEGRATION

Score

Scenario Agility	When a change occurs, does the team model the financial impact first?	
External Signals	Do demand estimates incorporate real customer and market data?	
Performance Metrics	Are planning metrics defined, owned, and consistently applied?	
Financial Integration	Does the operating plan tie directly to the financial plan and annual budget?	
Leadership Visibility	Does leadership have reliable visibility into inventory, fill rates, and demand?	
Insight & Integration Score		

CONTINUOUS IMPROVEMENT & VALUE CREATION

Score

Strategy Alignment	When priorities shift, does the operating plan change in the same cycle?	
Financial Exposure	Does leadership know what inventory and service gaps cost?	
ROI & Impact	Are financial outcomes of planning decisions tracked and visible to leadership?	
Continuous Improvement	Are planning processes and tools improved based on measured results?	
Capability & Scalability	Does the team have dedicated time and tools for monthly planning?	
Continuous Improvement & Value Creation Score		

Grand Total