OPERATIONS HEALTH CHECK

Score your operations and see where to start.

Twenty statements across five areas: ownership, documentation, handoffs, data, and automation readiness. Score each one, total your results, and use the guide at the end to choose your first fix.

How to score

Read each statement and score it as things work today, not how they're supposed to work.

> **0** means not in place.

> **1** means partly in place, or it depends on who's involved.

> **2** means in place and consistent.

If you're not sure, score it 0. Not knowing is a finding too. It helps to have two or three people from different teams score it separately, then compare.

AREA 01

Ownership

Every process needs one person who is accountable for it working.

	STATEMENT	0	1	2
1	Each core process, from sales handoff through collections, has one named owner.	☐	☐	☐
2	When something falls through the cracks, it's clear whose job it was to catch it.	☐	☐	☐
3	Owners have the authority to change the process they own.	☐	☐	☐
4	Coverage is in place when an owner is out or leaves the company.	☐	☐	☐

Area score (out of 8): _____

AREA 02

Documentation

If it isn't written down, it lives in someone's head.

	STATEMENT	0	1	2
5	Core processes are written down in a place the whole team can find.	☐	☐	☐
6	Documentation reflects how the work is actually done today.	☐	☐	☐
7	A new hire could follow the documentation without asking someone to explain it.	☐	☐	☐
8	Documents are reviewed and updated at least twice a year.	☐	☐	☐

Area score (out of 8): _____

AREA 03

Handoffs

Most problems start between teams, not inside them.

	STATEMENT	0	1	2
9	Each handoff between teams has a defined trigger, such as closed-won or go-live.	☐	☐	☐
10	The receiving team gets everything it needs without chasing.	☐	☐	☐
11	Account changes reach Billing without someone having to remember.	☐	☐	☐
12	Teams agree on what “done” means at each handoff.	☐	☐	☐

Area score (out of 8): _____

AREA 04

Data

Clean data is what every report, invoice, and automation depends on.

	STATEMENT	0	1	2
13	Each type of customer data has one system that is the source of truth.	☐	☐	☐
14	The CRM, billing, and accounting systems agree on each customer's plan and price.	☐	☐	☐
15	Duplicate and incomplete records are cleaned up on a regular schedule.	☐	☐	☐
16	Leaders trust the numbers in their reports without re-checking them.	☐	☐	☐

Area score (out of 8): _____

AREA 05

Automation readiness

Automation speeds up a clear process. It also speeds up a broken one.

	STATEMENT	0	1	2
17	The processes you want to automate already run the same way every time.	☐	☐	☐
18	Repetitive manual steps, such as re-keying data between systems, have been identified.	☐	☐	☐
19	Someone is responsible for maintaining automations after they're built.	☐	☐	☐
20	There's human review on anything automated that affects customers or billing.	☐	☐	☐

Area score (out of 8): _____

Your results

Ownership	_____ / 8
Documentation	_____ / 8
Handoffs	_____ / 8
Data	_____ / 8
Automation readiness	_____ / 8
Total	_____ / 40

32–40: Healthy

Your operations have a solid foundation. Focus on keeping documentation current and look for repetitive work that's ready to automate.

20–31: Working, but fragile

Things get done, but they depend on specific people. Strengthen your lowest-scoring area before adding new tools.

0–19: At risk

Gaps are likely causing rework, customer friction, and missed revenue. Start with ownership. Every other fix depends on it.

Where to start

Start with your lowest area score. If two are tied, choose the one earlier in this list. Ownership comes before documentation, and documentation comes before automation.

Fix one thing in 30 days. Pick a single statement you scored 0 and make it a 2.

Re-score each quarter. Use the same people so you can see real change.

Want a deeper look?

A self-assessment shows you where to look. A review from someone outside the team shows you what's actually happening and what to fix first.

Start with an Operations Assessment

A one-time review of how your customer lifecycle runs today, from sales handoff through collections, including data hygiene and revenue leakage. You get clear findings and prioritized recommendations. For more details, visit www.onestopsourcinggroup.com.

Book a 30-minute call at www.onestopsourcinggroup.com