Operations Health Audit

A comprehensive review of recurring work, handoffs, systems, and capacity.

CHECKLIST

Find the friction that slows your team.

Use the prompts, checkboxes, and fillable fields to capture what is happening now. Save a fresh copy for each review or client.

NAME / BUSINESS

Name or business

Date

IN THIS RESOURCE

01 Assess
Rate each statement.

02 Locate
Find costly friction.

03 Act
Choose three fixes.

How to use this audit

Mark one rating for each statement. Review your lowest scoring area first.

SIMPLE RATING SCALE

0	Rarely true or undocumented
1	Sometimes true or inconsistent
2	Usually true and repeatable

RECORD YOUR BASELINE

Business / team

Completed by

Review date

Next review date

FIVE AREAS TO REVIEW

1. Intake and priorities 2. Repeatable processes 3. Systems and information 4. Handoffs and communication 5. Capacity and visibility

Tip: Score the system as it works on an ordinary busy day, rather than how it works when everyone has extra time.

Audit the current workflow

Choose 0, 1, or 2 for each statement. Total each section out of 8.

INTAKE AND PRIORITIES	0	1	2
New requests enter through a clear channel.	☐	☐	☐
Each request has an owner and due date.	☐	☐	☐
We can distinguish urgent work from important work.	☐	☐	☐
We have a way to decline or defer work outside scope.	☐	☐	☐

SCORE / 8

REPEATABLE PROCESSES	0	1	2
Frequent tasks have current instructions or examples.	☐	☐	☐
A second person could complete key tasks from those instructions.	☐	☐	☐
We review steps that cause rework or delays.	☐	☐	☐
Templates exist for common communications or documents.	☐	☐	☐

SCORE / 8

SYSTEMS AND INFORMATION	0	1	2
Files have consistent names and a shared home.	☐	☐	☐
Access is granted by role and removed when no longer needed.	☐	☐	☐
We know where to find the latest client or project status.	☐	☐	☐
Important dates and recurring tasks are tracked.	☐	☐	☐

SCORE / 8

Audit the handoffs

Choose 0, 1, or 2 for each statement. Total each section out of 8.

HANDOFFS AND COMMUNICATION

	0	1	2
The next owner is clear after each handoff.	☐	☐	☐
We have an agreed place for decisions and updates.	☐	☐	☐
Clients know what to expect and when to expect it.	☐	☐	☐
Pending approvals are visible before they become blockers.	☐	☐	☐

SCORE / 8

CAPACITY AND VISIBILITY

	0	1	2
We know which work consumes the most time.	☐	☐	☐
Recurring work has a realistic time allowance.	☐	☐	☐
We can see bottlenecks before deadlines slip.	☐	☐	☐
There is a backup plan for absence or peak demand.	☐	☐	☐

SCORE / 8

Find the bottleneck

Low scores flag inconsistency. A high score can still hide a painful exception.

SCORECARD

Intake and priorities		/ 8
Repeatable processes		/ 8
Systems and information		/ 8
Handoffs and communication		/ 8
Capacity and visibility		/ 8

Lowest scoring area

What it costs us in time, errors, or client experience

One process worth mapping next

Your 30 day improvement plan

Choose a manageable change, assign an owner, and review the result.

PRIORITY 01

Priority 1 - change to make

Priority 1 - owner

Priority 1 - due date / proof it worked

PRIORITY 02

Priority 2 - change to make

Priority 2 - owner

Priority 2 - due date / proof it worked

PRIORITY 03

Priority 3 - change to make

Priority 3 - owner

Priority 3 - due date / proof it worked

Review these changes after 30 days. Keep what reduced friction, revise what did not, and choose the next bottleneck.