



# *THE OPERATIONS EFFICIENCY SCORECARD*

Is your business operating at peak efficiency, or are hidden bottlenecks costing you time and money?

This Operations Efficiency Scorecard will help you identify operational gaps and opportunities that could be holding your business back from scaling.

As an experienced Online Business Manager, I've seen how small improvements in operations can lead to massive growth.

This assessment is based on years of helping entrepreneurs transform their businesses from chaotic to clockwork.

*Uncover Your Business's  
Hidden Potential*



## *HOW TO USE THIS SCORECARD*

- 1. Set aside 20 minutes of uninterrupted time*
- 2. Answer each question honestly - this is for your eyes only*
- 3. Calculate your score in each section*
- 4. Review your results and priority action steps at the end*
- 5. Implement the quick wins identified for immediate improvement*



## PART 1: SYSTEMS PROCESSES ASSESSMENT

Rate each statement from 1-5: 1 = Never true | 2 = Rarely true | 3 = Sometimes true | 4 = Often true | 5 = Always true

### Core Business Operations

- \_\_\_\_\_ We have documented SOPs for all recurring tasks and processes
- \_\_\_\_\_ Team members can access information they need without asking me
- \_\_\_\_\_ We have clear criteria for determining priorities when multiple projects compete for resources
- \_\_\_\_\_ Our project management system is used consistently by all team members
- \_\_\_\_\_ We have automated routine tasks wherever possible
- \_\_\_\_\_ SUBTOTAL

### Client Management

- \_\_\_\_\_ We have documented SOPs for all recurring tasks and processes
- \_\_\_\_\_ Team members can access information they need without asking me
- \_\_\_\_\_ We have clear criteria for determining priorities when multiple projects compete for resources

- Our project management system is used consistently by all team members
- We have automated routine tasks wherever possible
- SUBTOTAL

## **Team Management**

- Team roles and responsibilities are clearly defined and documented
- We have standardized hiring and onboarding processes
- Team meetings are efficient with clear agendas and action items
- We have systems for regular performance feedback
- Communication channels are organized to minimize interruptions
- SUBTOTAL

## **Financial Operations**

- We have systems to track all business expenses and categorize them properly
- Our invoicing and payment collection processes are automated
- We regularly review financial metrics to inform business decisions
- Cash flow is predictable and managed proactively
- We have clear financial goals with tracking systems in place
- SUBTOTAL

## **PART 2: TIME & ENERGY AUDIT**

For each category, record the approximate hours spent weekly:

\_\_\_\_ Strategic planning & business development

\_\_\_\_ Client delivery & service

\_\_\_\_ Administrative tasks

\_\_\_\_ Team management

\_\_\_\_ Email & communication

\_\_\_\_ Social media & marketing

\_\_\_\_ Troubleshooting & putting out fires

\_\_\_\_ Other: \_\_\_\_\_

\_\_\_\_ TOTAL HOURS

Now categorize these activities:

\_\_\_\_ Hours spent on revenue-generating activities

\_\_\_\_ Hours spent on business-building activities

\_\_\_\_ Hours spent on administrative tasks that could be delegated

## **PART 3: GROWTH BLOCKERS IDENTIFICATION**

Check all that apply:

- ☐ I often find myself doing tasks that don't require my expertise
- ☐ Important projects are delayed because of day-to-day operations

- We frequently miss deadlines or have to rush at the last minute
- Team members often need clarification on expectations or instructions
- I don't have visibility into all aspects of my business operations
- Our systems don't communicate well with each other
- Client onboarding feels chaotic or inconsistent
- We've had client communication issues or misunderstandings
- I work more than I want to but still don't get everything done
- I don't have time to focus on strategic growth initiatives

Count the number of boxes checked: \_\_\_\_\_

## **RESULTS & INTERPRETATION**

### **Systems & Processes Assessment**

- 80-100 points: Exceptional operations foundation
- 60-79 points: Strong systems with some optimization opportunities
- 40-59 points: Developing systems with significant gaps
- Below 40: Critical operational issues requiring immediate attention



# Time & Energy Audit

## Ideal distribution:

- 50-60% on revenue-generating activities
- 20-30% on business-building activities
- 10-20% on administrative tasks

## Growth Blockers

- 0-2 checked: Minor operational hurdles
- 3-5 checked: Moderate operational challenges
- 6-8 checked: Significant operational roadblocks
- 9-10 checked: Critical operational bottlenecks

## YOUR PRIORITY ACTION STEPS

Based on your scores, here are the recommended first steps:

### **If You Scored Low in Systems & Processes:**

1. Document your top 3 most-used processes
2. Implement a centralized project management system
3. Create a communication protocol for your team

### **If Your Time Audit Shows Imbalance:**

1. List all tasks that can be delegated immediately
2. Block dedicated time for strategic work
3. Implement time tracking for better awareness

### **If You Have Multiple Growth Blockers:**

1. Prioritize solving client-facing issues first
2. Create an operations handbook for team reference
3. Schedule a weekly operations review meeting

## WHAT'S NEXT?

Now that you've identified your operational opportunities, you have three options:

- 1. DIY Approach:** Use the insights from this assessment to make improvements yourself (time-intensive but cost-effective)
- 2. Guided Implementation:** Book a complimentary Operations Strategy Session with me to talk about creating a custom 90 day operations improvement plan (ideal for businesses ready to make significant changes)
- 3. Done-For-You Solution:** Inquire about my full-service OBM package where I implement all necessary operational improvements while you focus on growing your business (fastest path to operational excellence)

## READY TO TRANSFORM YOUR OPERATIONS?

Book your complimentary 30-minute Operations Strategy Session at <https://calendly.com/lashalldodson>

During this call, we'll:

- ☐ Review your assessment results
- ☐ Identify your top 3 operational priorities
- ☐ Create a custom action plan for immediate improvement
- ☐ Explore how working with an OBM could accelerate your business growth

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