StratEdge
Operational & Medical Billing Consulting

Business Operations Readiness Checklist

A practical self-check for organizations that want clearer workflows, stronger processes, and better operational visibility.

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Organization Information

Organization Name	Completed By

Role/Title	Date

How to Use This Checklist

Check each item that describes your current operating environment. The more warning signs or unchecked controls you see, the more likely your organization may benefit from a targeted operations assessment, workflow review, process documentation effort, or implementation support plan.

Important note: This checklist is not legal, financial, compliance, or human resources advice. It is a practical readiness tool designed to highlight common process, documentation, accountability, reporting, and workflow issues that can affect operational clarity and performance.

Clarity. Structure. Better Systems.

1. STRATEGIC CLARITY & PRIORITIES

- [ ] The organization has clearly defined goals for the next 30, 60, and 90 days.
- [ ] Leadership priorities are documented and communicated to the team.
- [ ] The team understands which work is urgent, important, or lower priority.
- [ ] Strategic goals are connected to daily tasks and decision-making.
- [ ] There is a clear process for deciding what should be paused, delegated, or improved.
- [ ] Key initiatives have owners, due dates, and measurable next steps.

Warning signs: Goals change often, staff are unsure what matters most, important work is handled reactively, or priorities are not tied to action steps.

2. WORKFLOW & PROCESS DOCUMENTATION

- [ ] Core workflows are written down or visually mapped.
- [ ] Recurring tasks follow a consistent process.
- [ ] Staff know where to find current procedures or instructions.
- [ ] Processes are reviewed when bottlenecks or repeated issues occur.
- [ ] There is a defined method for updating workflows when work changes.
- [ ] Critical work does not depend on memory alone.

Warning signs: Processes live in people's heads, staff complete the same task different ways, or work slows down when one person is unavailable.

3. ROLES, ACCOUNTABILITY & HANDOFFS

- [ ] Responsibilities are clearly assigned by role or function.
- [ ] Team members know who owns each stage of a process.
- [ ] Handoffs between people or departments are documented.
- [ ] Follow-up tasks have owners and due dates.
- [ ] Recurring issues are escalated through a defined path.
- [ ] Leadership can quickly identify who is responsible for open items.

Warning signs: Tasks fall through the cracks, work is duplicated, ownership is unclear, or follow-up depends on informal reminders.

4. REPORTING & PERFORMANCE VISIBILITY

- [ ] Leadership reviews operational reports on a regular schedule.
- [ ] Key metrics are tied to business goals or service expectations.
- [ ] Reports are used to make decisions, not just stored or ignored.
- [ ] Performance issues are tracked over time.
- [ ] The organization can identify trends before problems become urgent.
- [ ] There is a clear rhythm for reviewing progress and next steps.

Warning signs: Reports exist but are not reviewed, metrics are unclear, leadership reacts late to problems, or performance trends are hard to see.

5. CLIENT / CUSTOMER INTAKE & SERVICE DELIVERY

- [ ] There is a clear intake process for new clients, customers, or internal requests.
- [ ] Required information is collected before work begins.
- [ ] Expectations, timelines, and next steps are communicated clearly.
- [ ] Service delivery tasks are tracked from start to finish.
- [ ] Client or customer issues are documented and reviewed for patterns.
- [ ] The organization has a repeatable process for closing out work.

Warning signs: Requests arrive through too many channels, expectations are unclear, work starts without enough information, or client follow-up is inconsistent.

6. DOCUMENTATION & KNOWLEDGE MANAGEMENT

- [ ] Important documents are stored in an organized, easy-to-find location.
- [ ] Templates are current and consistently used.
- [ ] Team members know where to find procedures, forms, and reference materials.
- [ ] Version control is used for important documents.
- [ ] Knowledge is not dependent on one person.
- [ ] Lessons learned are captured after major projects or recurring issues.

Warning signs: Files are hard to find, old templates are still in use, staff recreate documents from scratch, or business knowledge is not well preserved.

7. TOOLS, SYSTEMS & DATA ORGANIZATION

- [ ] The organization uses tools that support the actual workflow.
- [ ] Data is entered consistently and accurately.
- [ ] Systems are not creating unnecessary duplicate work.
- [ ] Access to key tools is managed appropriately.
- [ ] Information can be retrieved quickly when needed.
- [ ] Technology gaps or manual workarounds are documented.

Warning signs: Staff rely on spreadsheets outside the main system, information is duplicated, data is inconsistent, or tools do not match how work is performed.

8. RISK, QUALITY & CONTROL POINTS

- [ ] The organization has quality checks for important work.
- [ ] Risks, errors, and recurring issues are documented.
- [ ] Approvals are required for sensitive or high-impact decisions.
- [ ] There is a process for reviewing and correcting mistakes.
- [ ] Key deadlines are tracked and monitored.
- [ ] Operational risks are discussed before they become emergencies.

Warning signs: Errors repeat, deadlines are missed, controls are informal, or no one reviews risks until there is a problem.

9. GROWTH READINESS & VENDOR SUPPORT

- [ ] The organization has clear service descriptions, pricing, or scope boundaries.
- [ ] Core business documents are current and easy to share when needed.
- [ ] Proposal, onboarding, and follow-up processes are repeatable.
- [ ] Vendor, subcontracting, or procurement information is organized.
- [ ] New opportunities are tracked from lead to next action.
- [ ] The organization has a plan for scaling work without losing control.

Warning signs: Growth creates confusion, proposals take too long to prepare, opportunities are not tracked, or new work exposes gaps in the operating model.

10. OVERALL OPERATIONAL RISK SELF-CHECK

- [ ] The same issues keep resurfacing without a permanent fix.
- [ ] Processes are not documented or are difficult to follow.
- [ ] Staff are unsure who owns key tasks or decisions.
- [ ] Work is delayed because information is missing or hard to find.
- [ ] Reports are not reviewed consistently.
- [ ] Leadership lacks visibility into open work or performance trends.
- [ ] Customer, client, or stakeholder follow-up is inconsistent.
- [ ] Important business knowledge is concentrated with one person.
- [ ] New opportunities are difficult to manage because internal processes are not ready.
- [ ] The organization is growing, but the systems behind the work have not caught up.

Warning signs: Multiple checked items may indicate operational strain, unclear ownership, weak documentation, reporting gaps, or growth that has outpaced the organization's current systems.

Initial Observations

WHAT YOUR RESULTS MAY MEAN

0-6 items checked	Your organization may have a fairly structured operating model, but a periodic review can still help identify small gaps before they create bigger issues.
7-15 items checked	Your organization may have moderate operational risk. A targeted workflow review, process documentation effort, or reporting review may help improve clarity and consistency.
16+ items checked	Your organization may benefit from a more structured business operations assessment. Multiple checked items may indicate process gaps that affect performance, accountability, service delivery, or growth readiness.

SUGGESTED NEXT STEP

A business operations review can help determine:

- Where work is slowing down or becoming inconsistent
- Which processes need documentation or redesign
- Where roles, handoffs, and accountability need clearer
- ownership Which reports or metrics should be reviewed
- regularly
- How systems, templates, and tools can better support daily work

What practical steps should be prioritized first

NOTES

Ready for a Clearer Operating System?

StratEdge Systems Consulting provides structured reviews designed to identify workflow, documentation, reporting, and operational gaps.

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