

Operational Clarity Self-Assessment Checklist

Identify Hidden Inefficiencies Before They Limit Growth

Use this checklist to identify whether disconnected processes, systems, or information flows may be affecting efficiency, scalability, and business performance.

Systems & Processes	
Teams regularly switch between multiple systems to complete a single task	
Information is duplicated across spreadsheets, documents, emails, or software platforms	
The same data is entered more than once	
Different teams use separate tools to manage related activities	
Work depends heavily on manual coordination	
Workflow Management	
Approval processes rely heavily on email chains	
Workflow progress is difficult to track	
Bottlenecks are discovered only after delays occur	
Employees regularly chase updates from colleagues	
Important activities are managed through informal processes	
Information & Reporting	
Reports require manual data collection from multiple sources	
Teams spend significant time searching for information	
Leadership lacks a clear view of operational performance	
Reporting is inconsistent across different areas of the business	
Data accuracy depends on manual updates	

Operational Visibility	
It is difficult to identify where work is delayed	
Leadership lacks real-time visibility of key activities	
Customer information is spread across multiple systems	
Project progress requires manual investigation	
Performance information is not available when needed	
Governance & Accountability	
Ownership of information is unclear	
Responsibilities vary between teams	
Audit trails are limited or unavailable	
Process compliance is difficult to monitor	
Important operational knowledge exists only within individual employees	
Growth Readiness Scalability	
Operational complexity increases as the business grows	
New employees require extensive manual training	
Processes become harder to manage over time	
Software subscriptions continue to increase without improving visibility	
Existing systems create more administration than efficiency	
Business Agility	
Operational changes take longer than expected	
New requirements require significant workarounds	
Teams rely on temporary fixes to keep work moving	
Decisions are delayed by missing or inconsistent information	
Problems are often addressed reactively rather than proactively	



Your Results

0–5: Your operations appear relatively well connected. Continue reviewing processes regularly to maintain visibility and efficiency.

6–12: Some inefficiencies may already be affecting productivity and operational visibility. Reviewing workflows and system integration opportunities could provide measurable benefits.

13–18: Disconnected processes are likely creating operational friction. Improving visibility, reporting, and workflow coordination may increase efficiency and support growth.

19–30: Operational complexity may be limiting business performance, scalability, and agility. A structured review of workflows, systems, and information flows is recommended.

Areas Worth Reviewing

If you scored above 12, consider evaluating:

- Workflow visibility
- Process automation opportunities
- Data ownership and governance
- Reporting and business intelligence
- System integration requirements
- Decision-making processes
- Long-term operational scalability

Next Step

Operational challenges rarely result from a lack of effort. More often, they develop as systems, processes, and information evolve separately over time.

A structured operational assessment can help identify opportunities to improve visibility, reduce manual work, and create a stronger foundation for sustainable growth.

Book an Initial Online Assessment to discuss your business goals, requirements, and available options: **www.efibion.com**

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