

PULSELIFEX

CONTRACTS. CODE. CARGO.

FREE BUSINESS RESOURCE

Operations & Systems Health Check

Identify what is slowing your business down before it becomes expensive to fix.

A practical self-assessment for SMEs, manufacturers, traders, and growing businesses.

Better Systems. Better Decisions. Better Outcomes.

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HOW TO USE THIS TOOL

Review each area honestly. Mark items that apply to your business today.

- | | |
|---------------|---|
| Step 1 | Work through each section. Check every item that applies to your business today. |
| Step 2 | Score each section (number of items checked vs. total items). |
| Step 3 | Review your highest-scoring sections — these are your priority improvement areas. |
| Step 4 | Use your results as a starting point for a focused discussion with PulseLifeX. |

SECTION A — WORKFLOW & PROCESS

Review how work moves through your business day to day.

- | | | |
|-----------|--------------------------|---|
| A1 | ☐ | Manual follow-up is required to keep most tasks moving
Team members spend time chasing updates rather than doing productive work. |
|-----------|--------------------------|---|

A2**The same task is done differently by different people**

No documented standard process exists, leading to inconsistent outputs.

A3**Work gets delayed when a key person is unavailable**

Single points of failure exist because knowledge is not shared or documented.

A4**It is unclear who is responsible for a task at each stage**

Handoffs between people or departments are ambiguous or undocumented.

A5**Rework happens regularly due to missed information or miscommunication**

Corrections and redoing completed work consumes time and erodes confidence.

A6**Processes that worked when the business was smaller now create friction**

Growth has happened but the systems and processes have not kept pace.

SECTION A SCORE

____ / 6

Score: ____ / ____

SECTION B — VISIBILITY & INFORMATION

Assess how well information flows and how quickly you can access what you need.

B1**Getting a clear picture of business status requires manual effort**

There is no dashboard or system that provides real-time operational visibility.

B2**Important information lives in email threads, chat messages or personal notes**

Critical business data is scattered and difficult to find when needed.

B3**Decisions are regularly delayed because the right information is not available**

The lack of accessible, organised data slows down decision-making.

B4**The same data is entered into more than one system or spreadsheet**

Duplicate data entry wastes time and creates opportunities for errors.

B5**Reports and updates take hours to compile manually**

Reporting is a manual, time-consuming task rather than an automatic output.

B6**There is no single reliable place to check the status of pending work**

Team members must ask each other for updates instead of checking a system.

SECTION B SCORE

____ / 6

Score: ____ / ____

SECTION C — SYSTEMS & TOOLS

Evaluate whether your current systems are supporting or slowing your team.

C1



Spreadsheets are the primary tool for managing business operations

Key operational data lives in spreadsheets that are manually maintained.

C2



The business uses tools that do not connect or share data with each other

Disconnected systems create manual bridges and increase error risk.

C3



Automation could reduce manual work but has not been implemented

Repetitive tasks that could be automated are still done manually.

C4



The team workarounds current systems rather than relying on them

Systems exist but people avoid them because they are difficult to use.

C5



There is no CRM or structured way to manage customer or vendor interactions

Relationship management depends on individual memory rather than systems.

C6



Technology decisions are made without a clear process or evaluation criteria

New tools are adopted without assessing fit, cost, or integration requirements.

SECTION C SCORE

____ / 6

Score: ____ / ____

SECTION D — ACCOUNTABILITY & OWNERSHIP

Examine whether responsibilities are clear and consistently followed through.

- D1** ☐ **It is not always clear who owns a task or decision**
Shared or undefined ownership means work can fall through the gaps.
- D2** ☐ **Commitments made internally are not consistently tracked or followed up**
Verbal agreements and informal commitments frequently get missed.
- D3** ☐ **There is no structured review of what was committed and what was delivered**
No regular check-in process exists to track completion of key responsibilities.
- D4** ☐ **New team members take a long time to become productive**
Onboarding is slow because processes and knowledge are not documented.
- D5** ☐ **Important work depends on the presence or memory of one or two individuals**
Key knowledge is not shared or documented, creating business continuity risk.
- D6** ☐ **The team is busy but results do not always reflect the effort being made**
Effort is high but the lack of clear ownership reduces productive output.

SECTION D SCORE

____ / 6

Score: ____ / ____

SECTION E — GROWTH READINESS

Assess whether your current operations can support your next stage of growth.

- E1** ☐ **Adding more customers or orders would create significant operational strain**
Current capacity is already stretched and cannot easily absorb more volume.
- E2** ☐ **The business cannot easily replicate what it does well in a new location or market**
Success depends on individual effort rather than repeatable systems.
- E3** ☐ **Operational problems are solved reactively rather than prevented**
The team spends more time fixing problems than building preventive systems.
- E4** ☐ **There is no regular review of operational performance**
No structured cadence exists for reviewing efficiency, output, or improvement.
- E5** ☐ **The current team structure would struggle to manage 30% more volume**
Growth without better systems would require proportionally more headcount.

SECTION E SCORE

____ / 5

Score: ____ / ____

RESULTS SUMMARY

Transfer your section scores here to identify priorities.

Section	Area	Your Score	Items	Priority
A	Workflow & Process	____ /	6	
B	Visibility & Information	____ /	6	
C	Systems & Tools	____ /	6	
D	Accountability & Ownership	____ /	6	
E	Growth Readiness	____ /	5	
	TOTAL	____ /	29	

INTERPRETATION GUIDE

0 – 7 items	Your operations are in reasonable shape. Focus on maintaining discipline and building on existing strengths.
8 – 16 items	Operational friction is present and will increase with growth. Prioritise the highest-scoring sections.
17 – 29 items	Significant structural gaps exist. A focused operational review is recommended before further growth.

READY TO IMPROVE YOUR OPERATIONS?

This tool identifies where to focus. PulseLifeX helps you build the practical systems to fix it.

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