



OPERATING ASSESSMENT

180-Day Operating Assessment Checklist

A practical guide for identifying where work, ownership, workflow, metrics and execution systems need to be clarified before scaling, automating or transforming.

Prepared for	
Company	
Date	
Primary contact	
Business focus	

Board Room thinking. Break Room Practicality.

This is a lens on the system around the work.

This checklist is not a performance review of people. It is a practical lens for looking at the work and the operating system around the work.

Most execution problems are not isolated problems. They usually show up through unclear ownership, inconsistent workflows, weak handoffs, poor visibility, competing priorities, capacity pressure or decision routines that do not help leaders act fast enough.

<p>Work</p> <p>What actually happens across the process, not only what is shown in a procedure document.</p>	<p>Ownership</p> <p>Who is accountable for decisions, handoffs, escalations, outcomes and follow-through.</p>
<p>Variation</p> <p>Where inconsistent execution creates friction, waste, defects, delay or customer impact.</p>	<p>Readiness</p> <p>Whether the work is simple, stable, visible and measurable enough to improve, centralize, automate or AI-enable.</p>

The Scale That Works lens

Improvement work is strongest when leaders move in a disciplined sequence:

Eliminate	Simplify	Standardize	Centralize	Automate	AI-enable
Remove work that should not exist.	Reduce unnecessary steps.	Create consistency where it matters.	Consolidate work when it improves control or leverage.	Use technology for stable, repeatable work.	Apply AI where judgment support, pattern detection or guided action can create value.

Mark the pattern, then capture the evidence.

For each prompt, mark the current state. Do not overthink it. The value comes from seeing patterns across the work, not from forcing a perfect score.

Rating	Meaning
<input type="checkbox"/> Strong	Clear, consistent and reliable enough to build from.
<input type="checkbox"/> Unclear	Important elements are not visible, understood or aligned.
<input type="checkbox"/> Inconsistent	The work varies enough to create friction, rework or uneven outcomes.
<input type="checkbox"/> At Risk	The issue creates meaningful business, customer, cost, quality or execution risk.

What to capture in notes

- Specific examples or recent situations that illustrate the pattern.
- Where the issue shows up: site, function, workflow, queue, handoff or leadership routine.
- Business impact: delay, rework, cost, service, risk, capacity, experience or quality.
- Evidence: data, observations, stakeholder comments, escalations, defects or exceptions.

Recommended use: Complete individually before a leadership discussion, then compare patterns across stakeholders. Differences in perspective are often the first useful finding.

NEXT STEP

Use the checklist to start a better operating conversation.

The goal is not to create a perfect score. The goal is to identify where leaders need clearer work, clearer ownership, clearer cadence and better leverage.

Start with a 25-minute operating conversation.

Scale That Works helps leaders translate this checklist into a practical view of priorities, constraints, workflow leverage, automation readiness and next-step execution.

Contact

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