

SMALL BUSINESS

Operations Clarity Checklist

A practical 10-minute assessment for finding where scattered information, unclear ownership, missed follow-ups, and tool overload are costing your business time.

THE GOAL Leave with a clear picture of what is working, what is fragile, and the one operational improvement that will create the most relief.

Created by TaskSavvy Solutions

A system you grow into, not out of.

HOW TO USE THIS CHECKLIST

Score each statement based on how your business operates today - not how you intend for it to operate.

0	No / rarely true
1	Sometimes / partially true
2	Yes / reliably true

BE HONEST, NOT HARSH A low score is not a failure. It simply identifies where clearer structure can reduce friction and protect your time.

1 | One Source of Truth

Can your team find the right information without asking around?

Statement	0	1	2
1. Each major type of business information has one clearly defined home.			
2. Team members know where to find the current version of a file or record.			
3. Important information is not routinely trapped in texts, inboxes, or memory.			
4. Duplicate files and outdated versions are easy to identify and remove.			
5. Your folder and naming system still makes sense as the business grows.			

SECTION SCORE ____ / 10

CLARITY ASSESSMENT / CONTINUED

2 | Ownership & Follow-Through

Can everyone see who owns the work and what happens next?

Statement	0	1	2
6. Every active task or commitment has a named owner.			
7. Deadlines are documented in a shared system, not held in someone's head.			
8. Work uses consistent statuses such as Not Started, In Progress, Waiting, and Completed.			
9. Handoffs include the context the next person needs to act.			
10. Missed follow-ups are unusual and quickly visible when they occur.			

SECTION SCORE ____ / 10

3 | Client Visibility

Can you understand the full client relationship at a glance?

Statement	0	1	2
11. You maintain one current client record with reliable contact information.			
12. Open tasks, recent activity, and next steps can be traced to each client.			
13. Client status is consistently defined and kept current.			
14. Your team can see which clients need attention before they complain.			
15. Client information can be accessed without searching multiple unrelated tools.			

SECTION SCORE ____ / 10

CLARITY ASSESSMENT / CONTINUED

4 | Revenue Visibility

Can you see what has been earned, collected, and needs attention?

Statement	0	1	2
16. Invoices and payment status are tracked in one reliable place.			
17. Outstanding and overdue balances are visible without manual detective work.			
18. Revenue records consistently connect to the correct client.			
19. You can quickly see what was collected this month.			
20. Follow-up for unpaid invoices has a clear owner and routine.			

SECTION SCORE ____ / 10

5 | Operational Readiness

Can the business run clearly without everything depending on you?

Statement	0	1	2
21. Recurring operational work is documented and reviewed on a dependable schedule.			
22. Equipment, assets, or shared resources have an owner, location, and current status.			
23. Leadership can see priorities, risks, and bottlenecks in one operating view.			
24. Your tools support the workflow instead of forcing duplicate entry everywhere.			
25. A new team member could understand the core operating system without constant explanation.			

SECTION SCORE ____ / 10

YOUR CLARITY RESULT

TOTAL SCORE _____ / 50

Score	Result	What it means
0-15	Urgent clarity needed	The business is relying heavily on memory, individual effort, and scattered information. Start by choosing one source of truth and one owner for critical work.
16-29	Working, but fragile	Some systems exist, but consistency and follow-through depend on specific people. Standardize status, ownership, and review routines.
30-40	Structured, but disconnected	Core processes are working, yet information is separated across tools or views. Focus on connections, visibility, and reducing duplicate entry.
41-50	Clear and scalable	Your operational foundation is strong. Protect it with regular reviews, documentation, and thoughtful automation as you grow.

Your three biggest pressure points

1.

2.

3.

If you could fix only one of these in the next 30 days, which would create the most relief?

TURN YOUR SCORE INTO ACTION

A simple seven-day clarity reset

DAY 1	Choose the single pressure point that creates the most delay, uncertainty, or rework.
DAY 2	Name the one place where its information should live.
DAY 3	Assign one accountable owner and clarify who supports them.
DAY 4	Define the minimum statuses needed to show progress clearly.
DAY 5	Move current information into the chosen home and archive obvious duplicates.
DAY 6	Test the process with one real task, client, invoice, asset, or initiative.
DAY 7	Review what worked, remove friction, and schedule a recurring check-in.

Where your next fix may belong

Client records & follow-up	ClientFlow
Priorities & deadlines	TaskFlow
Invoices & payments	RevenueFlow
Equipment & maintenance	AssetFlow
Initiatives & recurring operations	OpsFlow
Multiple areas in one view	BusinessCORE

WHEN THE PROBLEM IS BIGGER THAN A TEMPLATE If your current processes are especially scattered, inconsistent, or unique, an Operations Cleanup can help organize the foundation before you automate it.

Explore practical business systems at tasksavvycore.com