



A FREE REFLECTION · 15 MINUTES · PEN & PAPER

THE OPERATIONS HEALTH CHECK

Twelve questions for small business owners who feel like the systems behind their work aren't quite keeping up. No score to chase. No solution to buy. Just an honest look at where things stand.

WHY THIS EXISTS.

Most small business owners I work with don't come to me with a clear problem. They come with a feeling. Something is harder than it should be. Something is slipping. They've been meaning to fix "the systems" but there's never been a quiet hour to figure out what that even means.

This Health Check is that quiet hour. It's not a quiz with a score. It's twelve questions, in three sections, designed to surface what you already know but haven't said out loud yet. The point is to give you language for the things that have been bothering you — so you can decide what to do about them, on your own terms.

You don't need to share the answers with anyone. You don't need to send them to me. If at the end you want to talk about what came up, you know where to find me. If you don't, you'll still leave with a clearer picture of your business than you walked in with.

How to use this.

- Print it out. Find a quiet 15–20 minutes. Phone in another room.
- Answer honestly — the version that's true, not the version that sounds professional.
- For scaled questions: 1 = "not at all," 5 = "completely true." Trust your first instinct.
- For the open prompts: short notes are fine. The point is to name the thing, not write an essay.
- When you're done, read the scoring page at the back. It's not a verdict — it's a starting point.

A note on tone. I don't believe in scaring small business owners into hiring help. If this Health Check tells you everything is fine, great — that's a real answer. If it tells you something feels off, that's a real answer too. The work is in the noticing.



01 THE DAY-TO-DAY

What does it actually feel like to run your business right now?

Q1. When something goes wrong this week — a missed email, a delayed delivery, a confused client — how often is the answer "because I forgot" or "because I was the only one who knew"?

1 2 3 4 5

1 = almost never · 5 = most of the time

Q2. If you took a real two-week vacation starting next Monday — phone off, no checking in — what would be on fire when you got back?

Q3. The last time a client onboarded with you, did it go essentially the same way as the previous client?

1 2 3 4 5

1 = every time is different · 5 = same every time

Q4. Name one thing that lives in your head — a process, a relationship, a piece of context — that would be hard for someone else to recreate if you weren't there.



02

VISIBILITY & DECISIONS

How clearly can you see what's actually happening in the business?

Q5. Can you tell me right now — without opening a spreadsheet — whether last month was better or worse than the month before, and why?



1 = no idea · 5 = yes, with the why

Q6. What's a number you'd love to know each week, that you currently don't have a good way to see?

Q7. When you make a pricing, hiring, or capacity decision, are you basing it on data, on instinct, or on hope?

Q8. How many of your tools (CRM, accounting, email, project management, scheduling) actually talk to each other vs. requiring you to copy information between them?



1 = all manual · 5 = all integrated



03 THE BIGGER QUESTION

What do you actually want this business to do for you?

Q9. Imagine the version of this business that runs without you needing to be there every day. How far away does that feel from where you are now?

1 2 3 4 5

1 = very far · 5 = almost there

Q10. If a buyer offered you fair market value for the business tomorrow, what's the first thing you'd be embarrassed for them to see?

Q11. What's one thing you've been meaning to fix for more than six months, that keeps getting pushed because the urgent always wins?

Q12. If you had a second pair of hands — someone you trusted to actually fix one thing in the business — what would you ask them to fix first?



WHAT YOU MIGHT BE LOOKING AT.

There's no score. There's no diagnosis. But here's how I'd read this if you handed it to me.

IF MOST OF YOUR SCALED ANSWERS WERE 4 OR 5

YOUR OPERATIONS ARE PROBABLY HEALTHIER THAN YOU THINK.

The fact that you sat down to do this Health Check at all suggests you care about the answer. If most of your answers came back strong, the work isn't to fix what's broken — it's to make sure what's working stays working as the business grows. Worth checking again in six months.

IF YOU SCORED A MIX OF 2S AND 3S

YOU HAVE A NORMAL SMALL-BUSINESS OPERATIONS SITUATION.

Things mostly work. Some things wobble. You probably know which ones. The question isn't whether you need help — it's whether the wobble is costing you enough (in time, in energy, in client experience) to be worth fixing now, vs. living with for another year.

IF YOU HAVE SEVERAL 1S, ESPECIALLY IN SECTION 1 OR 2

THE CHAOS IS REAL, AND IT'S PROBABLY COSTING YOU.

Operations chaos compounds. The cost shows up as lost clients, missed revenue, bad decisions made with bad information, and a founder who's tired in a way a vacation can't fix. This is fixable — but not by working harder at the same systems that aren't working.

THE SECTION 3 ANSWERS MATTER MOST

DON'T SKIM PAST THESE.

Q9 (the business running without you), Q10 (the embarrassment question), Q11 (the six-month thing), and Q12 (what you'd hand to a second pair of hands) — these are the questions that tell you what you actually want. Most operations problems are downstream of an unanswered question about what the business is for. If you wrote an honest answer to any of these, you've already done the hardest part.

WANT TO TALK ABOUT WHAT CAME UP?

This is where I'd usually say "book a call." So: book a call. It's free, it's thirty minutes, and there's no pitch. Just bring your answers (or don't) and we'll talk through whatever's loudest.

[BOOK A FREE 30-MINUTE CALL](#)

