

OPERATIONS HEALTH CHECK

Find out what's slowing your business down and where to start improving.

SYSTEMS & TOOLS

- ☐ We use three or fewer main platforms to manage daily operations.
- ☐ Our CRM integrates automatically with our key tools (e.g. email, finance, projects).
- ☐ We can generate accurate performance reports in under 15 minutes.
- ☐ All departments share access to one central data source.
- ☐ We don't rely on spreadsheets for critical information anymore.

WORKFLOW & EFFICIENCY

- ☐ Each process in our business has a clear owner and measurable steps.
- ☐ Routine tasks (e.g. follow-ups, data entry, reporting) are automated.
- ☐ There are no duplicate data entries between systems.
- ☐ Team members spend less than 10% of their time on repetitive admin work.
- ☐ Everyone knows what happens next once they complete their part of a task.

VISIBILITY & DECISION-MAKING

- ☐ Management can see project, sales, or customer status in real time.
- ☐ We can identify bottlenecks quickly when something stalls.
- ☐ Dashboards are automatically updated — no manual reporting.
- ☐ Data helps us make proactive decisions, not just review past results.
- ☐ If a key staff member is absent, workflows continue without interruption.

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TEAM & ADOPTION

- ☐ All staff actively use our business systems daily (no shadow spreadsheets).
- ☐ New team members can be trained on our tools in under 2 hours.
- ☐ Our team feels confident and supported using automation and CRM tools.
- ☐ Everyone understands how technology supports their daily goals.
- ☐ We regularly review tools and processes to keep improving efficiency.

SCORING

Count how many boxes you've checked and see where you stand 📌

- 0-4:** Your systems are running you — let's fix that.
- 5-9:** Efficiency gaps are costing you time and revenue.
- 10-14:** You're in control, but there's still room to grow.
- 15-20:** You're efficient — it's time to scale smarter.

NEXT STEP

📋 Book a No-Obligation Discovery Call to review your results and identify opportunities to automate and streamline your business.

👉 <https://ipgn-solutions.com/contact-us/>

BOOK A NO-OBLIGATION DISCOVERY CALL