![Zavanta by COMPROSE logo]

Operations Assessment
Pinpointing Operations Pain

Everyone wants to streamline their operations and run as efficiently as possible. The first step in achieving that goal is to pinpoint serious issues or a worry you need to address right away. This assessment worksheet with help you do that and communicate the business outcome (goal) you want to achieve such as reduced errors, faster application rollouts, and lower compliance costs. Rate each of the business problems below according to how significant a problem you view it to be. If desired, list additional items specific to your situation.

You may want to have your Team members perform this assessment independently and then meet to compare results. This assessment is also a valuable tool to spur team discussions and for checking that everyone is on the same page. Maybe there are issues management is not aware of.

Growth, Business Change and New Initiative

1 2 3 4 5 (1=Not a problem 5=Severe Problem)
- ○ ○ ○ ○ ○ Expansion: New locations, staff, business line requiring staff ramp-up, training
- ○ ○ ○ ○ ○ High staff turnover: mergers, layoffs, consolidation
- ○ ○ ○ ○ ○ Every time you turn around there is a new regulation or law. Difficulty keeping up
- ○ ○ ○ ○ ○ New application software rollout requiring business process change and staff re-training
- ○ ○ ○ ○ ○ New product launch requiring quick staff ramp-up, re-training
- ○ ○ ○ ○ ○ Other: _____
- ○ ○ ○ ○ ○ Other: _____

People, Productivity and Performance

1 2 3 4 5 (1=Not a problem 5=Severe Problem)
- ○ ○ ○ ○ ○ Missed deadlines
- ○ ○ ○ ○ ○ Inconsistent performance, no repeatable processes
- ○ ○ ○ ○ ○ Duplication of effort and re-inventing the wheel are common
- ○ ○ ○ ○ ○ Frequent cost overruns and project delays
- ○ ○ ○ ○ ○ Frustrating bottlenecks in specific tasks or departments
- ○ ○ ○ ○ ○ Difficulty completing routine tasks, too complex and time-consuming
- ○ ○ ○ ○ ○ Disorganized workflow. Inefficient, complicated processes.
- ○ ○ ○ ○ ○ Excessive errors and re-work reduce productivity/ increase costs
- ○ ○ ○ ○ ○ Everyone has to ask/interrupt the "expert" to complete tasks
- ○ ○ ○ ○ ○ Backlogged work
- ○ ○ ○ ○ ○ Other: _____
- ○ ○ ○ ○ ○ Other: _____

Quality and Customer Satisfaction

1 2 3 4 5   (1=Not a problem 5=Severe Problem)
○ ○ ○ ○ ○   Poor or slow service (backlogged requests, slow response time, etc.)
○ ○ ○ ○ ○   Too many errors / mistakes / defects impacting customers/patients/users
○ ○ ○ ○ ○   Customer dissatisfaction and complaints
○ ○ ○ ○ ○   Non-compliance with contractual performance commitments (or risk thereof)
○ ○ ○ ○ ○   Customers switching to competitors
○ ○ ○ ○ ○   Cost of providing quality service too high / breaking the budget
○ ○ ○ ○ ○   Other: _____
○ ○ ○ ○ ○   Other: _____

Management and Training

1 2 3 4 5   (1=Not a problem 5=Severe Problem)
○ ○ ○ ○ ○   Expectations and responsibilities are unclear (no accountability, no boundaries)
○ ○ ○ ○ ○   Employees don't know or understand "official" policies and procedures
○ ○ ○ ○ ○   Long "ramp up" time before new employees are productive
○ ○ ○ ○ ○   Lack of coordination. Right hand doesn't know what the left hand is doing
○ ○ ○ ○ ○   Best practices are not shared across work groups (silo)
○ ○ ○ ○ ○   Management doesn't understand day-to-day tasks /obstacles
○ ○ ○ ○ ○   Other: _____
○ ○ ○ ○ ○   Other: _____

Knowledge Retention Problems "Brain Drain"

1 2 3 4 5   (1=Not a problem 5=Severe Problem)
○ ○ ○ ○ ○   Nothing is written down, key employees carry everything in their heads
○ ○ ○ ○ ○   Major disruptions happen when employees leave, retire or take vacation
○ ○ ○ ○ ○   High training and re-training costs are straining the budget
○ ○ ○ ○ ○   Best practices are not captured or shared
○ ○ ○ ○ ○   Other: _____
○ ○ ○ ○ ○   Other: _____

Disaster Preparedness

1 2 3 4 5   (1=Not a problem 5=Severe Problem)
○ ○ ○ ○ ○   Few employees know what to do in the event of a disaster/emergency
○ ○ ○ ○ ○   Company liability risk is high
○ ○ ○ ○ ○   Inability to function for even short periods could endanger business
○ ○ ○ ○ ○   Other: _____
○ ○ ○ ○ ○   Other: _____

Operational Risk Management and Compliance

1 2 3 4 5   (1=Not a problem 5=Severe Problem)
○ ○ ○ ○ ○   Staff frequently fail to comply with regulatory and contractual obligations
○ ○ ○ ○ ○   Risk of non-compliance lawsuits, sanctions, and lost contracts is high
○ ○ ○ ○ ○   Compliance audits are disruptive, costly and stressful
○ ○ ○ ○ ○   Costs for compliance initiatives are too high
○ ○ ○ ○ ○   Cybersecurity risk is high, employees lack training
○ ○ ○ ○ ○   Other: _____
○ ○ ○ ○ ○   Other: _____

For Management

1 2 3 4 5   (1=Not a problem 5=Severe Problem)
○ ○ ○ ○ ○   You lack controls and methods to make employees accountable.
○ ○ ○ ○ ○   Consumed by tactical work, working long hours, no time for innovation.
○ ○ ○ ○ ○   You are spending too much time answering routine questions
○ ○ ○ ○ ○   Too many "black hole" areas prevent you from moving forward
○ ○ ○ ○ ○   Spending too much time putting out fires, high stress
○ ○ ○ ○ ○   High incidence of finger-pointing, staff members playing the "blame game"
○ ○ ○ ○ ○   No way to delegate, too many high-priced employees are performing $15/hr jobs
○ ○ ○ ○ ○   You hang onto poor performers because no one else knows their job and you don't
　　　　　　　　have the capacity to train someone new
○ ○ ○ ○ ○   Other: _____
○ ○ ○ ○ ○   Other: _____

Other

1 2 3 4 5   (1=Not a problem 5=Severe Problem)
○ ○ ○ ○ ○   Other: _____
○ ○ ○ ○ ○   Other: _____

Thank you for taking our assessment.
See next steps on the following page.

Operations Assessment Results Next Steps

Any item the Team ranks 4 or 5 is an automatic candidate for issues you may want to address immediately. If your Team has no items ranking 4 or 5, pick three items with the highest ranking. Hopefully this exercise also exposes overlooked opportunities.

At COMPROSE, we've helped our clients go through this analysis and measure the financial impact of operations problems. Placing a financial value on an issue also helps prioritize resources and budgets for course correction. Asking questions like these will help:

• What's a new employee's time-to-competency?
• Error rates, returns, customer long wait times – have you measured their cost?
• Are delegation issues holding back sales? If so, by how much?
• What if you could cut audit time by 25%? 50%? How much would you save?

Sometimes just making incremental improvements in one or two processes can get a rapid payback so don't overlook the simple stuff.

The Ultimate Solution:
Having "Systems" that all Employees can Follow

Having a clear Process – Policy -- SOP system that all employees can follow is the best way to solve serious operational problems and grow and thrive. Our Zavanta standardization cloud platform coupled with our Operations Mapping method has enabled hundreds of organizations to reduce compliance costs, reduce operating costs, and more. Results such as a 60% reduction in errors, a 50% reduction in audit time, are not uncommon. One client saved $360,000 / year in a workgroup of just 10 people. "Living, breathing" systems are essential for Operations Excellence; regulatory bodies require them; some are even mandating that you prove employees are using them. If you'd like to learn more visit our company website below.

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