

Operations Readiness Checklist

A practical self-assessment to identify where your business operations need the most attention

**HOW TO USE
THIS CHECKLIST**

Work through each section and tick every item that is already in place in your business. Any unticked box is an opportunity for optimisation.
Count your ticks per section to identify your priority focus areas.
Fewer ticks = more urgent attention needed.

SECTION 01

Process & Documentation

- Core business processes are clearly documented and accessible to relevant people
- Standard Operating Procedures (SOPs) exist for recurring tasks and workflows
- SOPs are reviewed and updated regularly (at least once annually)
- Processes are not solely dependent on one person's memory or presence (no silos!)
- A central, organised location exists for all operational documentation
- New team members can be onboarded using existing documentation **alone**
- Version control is in place for key documents and procedures

Section score: _____ / 7

SECTION 02

Systems, Tools & Technology

- Your tech stack is documented (tools used by each role, purposes of each tool, who manages each tool)
- Access credentials and login details are stored and managed securely (dedicated password manager)
- Team access levels are defined – the right people have the right permissions
- Tools are integrated where possible to reduce manual data transfer
- Automation handles at least one repetitive operational task
- Software subscriptions are tracked and reviewed for value regularly (at least once every six months)
- A backup or contingency is in place if a key tool becomes unavailable

Note: Accounting software falls outside the By Grace Business Operations service scope but should still be assessed separately.

Section score: _____ / 7

SECTION 03

Financial Operations & Administration

- A cashflow plan or forecast is maintained and reviewed regularly
 - Expenses are tracked consistently with clear categories
 - Invoicing is completed promptly and payment follow-ups are systemised
 - Supplier relationships and payment terms are documented
 - Contracts with employees, clients and suppliers are current, signed, and filed
 - RFQ (Request for Quotation) responses follow a consistent, documented process
 - Compliance documentation is up to date and stored in an easily accessible manner
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Section score: _____ / 7

SECTION 04

Executive & Calendar Management

- Your calendar reflects your priorities – not just what others request of you
 - Meeting preparation is systemised (agendas, pre-reading, action tracking)
 - Email or communication inbox is organised with a clear triage system
 - Action items from meetings are captured and followed up consistently
 - Travel and logistics are planned and documented in advance
 - A delegation or cover plan exists for when management is unavailable
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Section score: _____ / 6

SECTION 05

Digital & Content Operations

- Your website is maintained, up to date, and technically sound
 - Brand assets (logo, colours, fonts, templates) are stored in one accessible place
 - Content publishing follows a consistent, documented process
 - Project management platform is actively used and kept current by the team
 - Documents are formatted consistently and meet quality standards before sharing
 - Research and competitive intelligence is gathered in a structured and ongoing way
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Section score: _____ / 6

SECTION 06

Team, Communication & Culture

- Roles and responsibilities are clearly defined and documented
 - Communication channels are agreed upon – the team knows what goes where
 - Cross-functional projects have clear ownership and coordination processes
 - Onboarding for new team members is structured and consistent
 - Confidentiality and data security protocols are communicated and followed
 - The business can operate at acceptable capacity when the owner is away
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Section score: _____ / 6

SECTION 07

Business Continuity & Risk

- A basic business continuity plan exists for unexpected disruptions
 - Critical knowledge is documented – not locked in any one person's head (again, no silos!)
 - Key contacts (suppliers, clients, service providers) are centrally stored
 - Data is backed up regularly and restoration has been tested
 - Compliance and legal obligations are known, tracked, and met
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Section score: _____ / 5

OVERALL SCORE

Total ticked:	_____ / 46
37 - 46	Strong foundation - Refinement and optimisation are your next steps.
25 - 36	Solid progress - Targeted improvements will create meaningful clarity and efficiency.
13 - 24	Significant gaps present - Operational support will reduce strain and risk.
0 - 12	Foundations needed - Starting with core processes will unlock immediate relief.

Ready to address the gaps?

Book a free 30-minute Strategy Call with Naomi.
No obligation - just clarity on where to start.

admin@bygrace-ops.com
+27 61 355 0374