

Operational Health Self-Assessment

Clarity Engine Ops

This assessment will help you understand the current state of your business operations and identify areas that need attention. Answer honestly—this is for YOUR benefit.

Time to complete: 5-10 minutes

Total questions: 20

Scoring: Automatic at the end

How to Use This Assessment

1. Read each question carefully
2. Check YES or NO for each question
3. Total your YES answers in each section
4. Calculate your overall score at the end
5. Review your results and recommendations

Section 1: Timing Signals

These questions assess whether you have operational problems that need immediate attention.

	Question	YES	NO
1.	Are you working 60-80+ hour weeks consistently (not just occasionally)?	☐	☐
2.	Are you turning down revenue because operations can't handle more volume?	☐	☐
3.	Is everything undocumented (all knowledge lives in people's heads)?	☐	☐
4.	Does your team not know who does what (unclear roles and responsibilities)?	☐	☐
5.	Can you NOT take a vacation without business chaos?	☐	☐
6.	Are profit margins declining despite revenue growth?	☐	☐
7.	Does growth make operations worse, not better?	☐	☐

Total YES answers in Section 1:

_____ / 7

Section 2: Readiness Factors

These questions assess whether you're ready to invest in fixing operations.

	Question	YES	NO
8.	Are you making \$30K-\$50K+/month consistently (for 3+ months)?	☐	☐
9.	Can you sustain a \$3K-\$10K/month investment in operational help?	☐	☐
10.	Can you commit 5-10 hours/week to working WITH operational help?	☐	☐
11.	Are you willing to delegate decisions to your team?	☐	☐
12.	Are you willing to trust systems over gut feel?	☐	☐
13.	Are you willing to change how you currently operate?	☐	☐

Total YES answers in Section 2:

_____ / 6

Section 3: Operational Maturity

These questions assess the current state of your operational systems.

	Question	YES	NO
14.	Do you have documented Standard Operating Procedures (SOPs) for core processes?	☐	☐
15.	Do you have a clear organizational chart with defined roles?	☐	☐
16.	Do you have a project management system that your team actually uses?	☐	☐
17.	Do you have monthly financial reviews and budget tracking?	☐	☐
18.	Can your team make most day-to-day decisions without you?	☐	☐
19.	Do you have standardized client onboarding and delivery processes?	☐	☐
20.	Could your business run for a week without you with minimal disruption?	☐	☐

Total YES answers in Section 3:

_____ / 7

Your Results & Recommendations

Calculate Your Overall Score

Section	Your Score	Max
Section 1: Timing Signals	_____	/ 7
Section 2: Readiness Factors	_____	/ 6
Section 3: Operational Maturity	_____	/ 7
TOTAL SCORE	_____	/ 20

What Your Score Means

Section 1: Timing Signals (Questions 1-7)

Score	Interpretation
0-1 YES	No urgent operational problems. Keep monitoring.
2-3 YES	Operational issues emerging. Start planning to address them.
4-5 YES	Significant operational problems. Time to take action.
6-7 YES	Critical operational problems. You needed help months ago.

Section 2: Readiness Factors (Questions 8-13)

Score	Interpretation
0-2 YES	Not ready yet. Focus on revenue stability and mindset shifts.
3-4 YES	Almost ready. Work on missing readiness factors.
5-6 YES	You're ready to invest in operational help.

Section 3: Operational Maturity (Questions 14-20)

Score	Interpretation
0-2 YES	Minimal operational systems. Significant work needed.
3-4 YES	Some systems in place but gaps remain.
5-7 YES	Good operational foundation. Focus on optimization.

Your Decision Guide

Based on your scores, here's what you should do:

If You Have...	Recommendation
Section 1: 4+ YES AND Section 2: 5-6 YES	HIRE FRACTIONAL COO NOW You have significant operational problems AND you're ready to fix them. Don't wait. Book a Clarity Call today.
Section 1: 2-3 YES AND Section 2: 5-6 YES	START PLANNING Operational issues are emerging and you're ready. Begin researching options and planning your approach.
Section 1: 4+ YES BUT Section 2: 0-4 YES	GET READY FIRST You have problems but aren't ready yet. Work on revenue stability and mindset shifts, then hire help.
Section 1: 0-1 YES Section 2: Any score	KEEP MONITORING No urgent problems yet. Re-assess every 3-6 months as you grow.

Your Next Steps

If you scored "Hire Fractional COO Now":

1. Book a free Clarity Call with Shirley
2. Discuss your specific operational challenges
3. Get a custom plan for your business
4. Decide if The Clarity Transformation is right for you

If you scored "Start Planning":

1. Read the complete guide: "When to Hire a Fractional COO"
2. Calculate your operational cost using the Cost Calculator
3. Book a Clarity Call when ready to discuss

If you scored "Get Ready First":

1. Focus on revenue stability first
2. Start documenting your top 3 processes (DIY)
3. Re-take this assessment in 3 months

If you scored "Keep Monitoring":

1. Bookmark this assessment
2. Re-take every 3-6 months as you grow
3. Watch for timing signals emerging

Ready to fix your operations

Book a free 30-minute Clarity Call.

No sales pitch. Just honest conversation about your operations.

Visit: clarityengineops.com/clarity-call