

Operations Pre-Audit

This Operations Pre-Audit is a review process designed to help you evaluate the ways that your business works now and will need to work in the future to fuel growth. It focuses on the *core processes areas* in your business – how work gets done and how you deliver value and service to your customers. While the questions below are not an exhaustive list, they are a powerful early stage tool designed to prompt your thinking about the effectiveness and efficiency of your business processes.

Overview	
What does your business 'do'?	
How does your business 'do' or accomplish the tasks of ongoing operations?	
How has your industry grown/changed over the last 5years?	
How has your target market grown/changed over the last 5years?	
How has your business grown/changed over the last 5years?	
What will your business need to do differently in order to grow over the next 5 years?	
Human Resources	
Do you have the right people working for your business? Are they in the right position?	
How do you find, train and retain the people with the skills and talent that your business needs?	
Do you have policies and procedures to guide your human resources management?	
Technology	
What technology or software do you use in your business?	
How does or can technology improve your business processes (e.g., production, sourcing, fulfillment)?	

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Finance	
How do you manage your sales, marketing and promotion efforts?	
What are your billing, collection and payment processes?	
What financial reports do you use on a regular basis to manage your business?	

Metrics	
How do you measure your effectiveness and progress towards your goals? How do you know if you are on track or off track?	
How timely, detailed and accurate is the data you obtain about your business? Where do you get this information?	
Do you use an 'Executive Dashboard' to monitor critical success factors?	

Planning	
Does your business have detailed documentation for all ongoing business procedures and activities?	
Do you have a contingency plan in case of an emergency or unforeseen circumstances?	
Are your personal goals and objectives aligned with your business goals and objectives?	
Do you have an exit strategy – for you and for your business?	

Creating Value for Your Customers	
How does your operations provide <i>direct value</i> to your customers that they can readily see and understand?	
Which aspects of your operations provide little or no value to your customers (either customers cannot see the value, it is not captured, or the value is required but minimal)?	
What could you outsource or buy?	