

Operations Audit Checklist

12-point assessment · vertmix.com

Use this checklist to identify operational gaps across your organization. For each question, check YES or NO. Each question highlights a common gap; the more that apply to your business, the more room there is to save time and reduce errors. It's the framework we use to start new engagements.

01 AUTOMATION GAPS

- | | | | |
|----|--|------------------------------|-----------------------------|
| 01 | Do any employees spend more than 2 hours/day on repetitive data entry or copy-paste tasks? | ☐ YES | ☐ NO |
| 02 | Are reports or dashboards generated manually instead of auto-updating in real time? | ☐ YES | ☐ NO |
| 03 | Is any part of your scheduling, dispatch, or job assignment process handled via spreadsheet, email, or whiteboard? | ☐ YES | ☐ NO |

02 SYSTEM INTEGRATION

- | | | | |
|----|---|------------------------------|-----------------------------|
| 04 | Do your teams re-enter the same data into more than one system (e.g., CRM → ERP → invoicing)? | ☐ YES | ☐ NO |
| 05 | When a customer record is updated, does it automatically sync across all platforms? | ☐ YES | ☐ NO |
| 06 | Can your leadership team see real-time operational data without asking someone to pull it? | ☐ YES | ☐ NO |

03 MANUAL PROCESSES

- | | | | |
|----|---|------------------------------|-----------------------------|
| 07 | Do you rely on tribal knowledge — processes that only one or two people fully understand? | ☐ YES | ☐ NO |
| 08 | Is your onboarding or training process documented in a system, or does it live in someone's head? | ☐ YES | ☐ NO |
| 09 | Are approvals, sign-offs, or quality checks handled on paper or via email chains? | ☐ YES | ☐ NO |

04 REPORTING & VISIBILITY

- | | | | |
|----|---|------------------------------|-----------------------------|
| 10 | Can you identify your most and least profitable jobs, clients, or service lines within 5 minutes? | ☐ YES | ☐ NO |
| 11 | Do you have a single source of truth for project status, or do teams maintain separate trackers? | ☐ YES | ☐ NO |
| 12 | Are you confident your current tools can support 2× your current volume without breaking? | ☐ YES | ☐ NO |

Scoring: 0–2 NO answers: well-optimized · 3–5: moderate gaps · 6+: significant opportunity for improvement

Ready to close the gaps?

Book a free 30-minute consultation at vertmix.com · hello@vertmix.com

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