Operational Process Maturity Assessment V1.01

Answer the questions in each section to perform an assessment on your organization's day-to-day operational process maturity level.

For each of the questions, score 2 points for "Agree", 1 point for "Neutral" and 0 points for "Disagree." You will receive a <u>resulting score out of ten for each section</u>. Review your score for each section below:

0 to 4 points: You may find your organization too reliant on having great people. Exceptional personnel should be a company's competitive advantage, however, consistent operational process should be the "bread and butter." Compensating top-level talent to perform repetitive duties (or duties that can be automated) is wasteful - it is also unchallenging to your top performers. You may be observing inconsistency in the quality and/or efficiency of your product or service.

It may be time to consider beginning with the basics of documenting your operational processes. This will almost immediately begin to create consistency of execution and efficiency gains for your organization. If you are looking to sell your business, documenting your processes will help ensure you get top dollar!

5 to 7 points: Good work. Your organization has established some excellent processes and it is likely being rewarded with happy customers, confident staff members and engaged leaders. Your organization observes the value of having sound operational practices and looks forward to further optimization in the future for increased profitability and scalability.

You may be poised to take your organizational process maturity journey to the next level.

8 to 10 points: Great work! Your organization fully-realizes the value of measuring and optimizing process. It is also being rewarded with an explainable balance sheet and strong customer satisfaction. When things go wrong, it's the exception, not the norm, and it's handled quickly and appropriately by exceptional talent.

At this stage, you may be looking to experiment with new technology or advanced data analytics to anticipate future problems with your processes and address or solve them ahead of time. Precision is key.

Organizational Culture

1. Our company uses a formalized training process to help our employees and contractors understand what we do.	☐ Disagree	☐ Neutral	☐ Agree
2. Our company has defined processes for core functions of Sales, HR, Legal, IT, Finance and Supply Chain.	☐ Disagree	☐ Neutral	☐ Agree
3. Our company relies on performance measures and reporting on process activity.	☐ Disagree	☐ Neutral	☐ Agree
4. Our company has processes for receiving payments from customers and making payments for expenses.	☐ Disagree	☐ Neutral	☐ Agree
5. Our company has a formalized approach for ensuring our employees and contractors know our Mission, Vision, and core values in delivering our service or product to our customers.	☐ Disagree	☐ Neutral	☐ Agree
		Total Score	

Process Design and Modeling

1. Most or all of our commonly used processes have been thoughtfully designed and implemented. (ex. onboarding and training, customer intake, service delivery and support, payroll and payment processing)	☐ Disagree	☐ Neutral	☐ Agree
2. Most or all of our commonly used processes are a true reflection of what *actually* happens in our business. (not "how we would like/hope for it to work")	☐ Disagree	☐ Neutral	☐ Agree
3. Our process owners are clearly identifiable and take full accountability for our processes.	☐ Disagree	☐ Neutral	☐ Agree
4. We have designated roles and tools in place for effective process mapping and modeling.	☐ Disagree	☐ Neutral	☐ Agree
5. Our customers are very pleased by the consistency and quality of our product or service due to exceptional process.	☐ Disagree	☐ Neutral	☐ Agree
		Total Score	

Documentation Availability and Accessibility

1. Most or all of our processes are documented.	☐ Disagree	☐ Neutral	☐ Agree
2. Our process documents follow consistent standards, templates and best practices.	☐ Disagree	☐ Neutral	☐ Agree
3. Our process documents are all stored in a single location, accessible and viewable by all personnel.	☐ Disagree	☐ Neutral	☐ Agree
4. A copy of our operational process documents is available in an alternate location in the event that the primary storage location becomes unavailable.	☐ Disagree	☐ Neutral	☐ Agree
5. Contact information for critical roles is documented and accessible by emergency response personnel.	☐ Disagree	☐ Neutral	☐ Agree
		Total Score	

Operational Performance

1. Most or all of our operational processes are measured for efficiency and/or quality.	☐ Disagree	☐ Neutral	☐ Agree
2. Our functional leaders regularly review their team's adherence to process.	☐ Disagree	☐ Neutral	☐ Agree
3. Our processes drive operational performance reporting.	☐ Disagree	☐ Neutral	☐ Agree
4. We are able to explain the tangible or intangible value of each operational process.	☐ Disagree	☐ Neutral	☐ Agree
5. We conduct performance meetings (to review operational metrics) regularly between functional departments and/or vendors.	☐ Disagree	☐ Neutral	☐ Agree
		Total Score	

Continuous Service Improvement

1. Most or all operational processes are reviewed and updated on a regular basis.	☐ Disagree	☐ Neutral	☐ Agree
2. When changes occur to an operational process, the related documents are updated in a timely fashion.	☐ Disagree	☐ Neutral	☐ Agree
3. When we improve a process, our organization is able to measure any applicable tangible benefits.	☐ Disagree	☐ Neutral	☐ Agree
4. Process owners and functional leaders regularly identify quality & efficiency opportunities via process reviews.	☐ Disagree	☐ Neutral	☐ Agree
5. We collect data from our processes and use key performance indicators to help us measure the health of our operations.	☐ Disagree	☐ Neutral	☐ Agree
		Total Score	

Additional information and resources are available by contacting info@makeitwork.ca or info@processprimer.com.

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