



FREE OPERATIONS AUDIT

The Operations Audit Guide: Uncover the Bottlenecks, Misalignments, and Growth Barriers in Your Business

Whether you're scaling through acquisition or organic growth, operational misalignment can silently erode your margins and slow momentum. This audit guide helps you uncover process gaps, technology misfires, and team misalignments that reduce profitability and prevent scale.



Section 1: Process Audit

Well-defined processes are the foundation of scalable, repeatable success. To evaluate your workflow maturity, assess the following best practices:

Coverage: Every core business activity—sales, onboarding, billing, hiring, project delivery—should have a corresponding documented process. Gaps create inconsistency and friction.

Clarity: A good process is not just written; it's easy to follow. Language should be simple, direct, and include visuals whenever possible to improve comprehension.

Structure: Each process should include two elements:

- A Flowchart Diagram: A visual overview of the steps and decision points that illustrates the overall logic and sequence.
- A Standard Operating Procedure (SOP): A step-by-step instruction document that explains how to perform each task and—critically—why it matters.

Accessibility: Processes must be stored in a centralized, intuitive, and version-controlled knowledge base that any authorized team member can search and access on demand. Confluence, Notion, and Tettra are strong options.

Governance & Feedback Loop: Set a cadence for regular reviews and create channels where employees can suggest changes. Great processes evolve with your business.

Bonus Tip: Link your SOPs to training materials and technology guides to create a single source of truth for onboarding and troubleshooting.



Section 2: Tech Stack Audit

Technology should fuel productivity and insight—not frustration and rework. Here's how to evaluate your stack:

Data Utility: Can your tools provide timely, accurate reporting to support daily decisions and strategic planning? Your dashboards should answer real business questions, not just track vanity metrics.

Integration: Redundant data entry is the enemy of scale. Ensure your systems are connected (via native integrations, Zapier, or APIs) to sync information between departments.

Alignment with Process: Your SOPs should specify where and how users interact with technology. Processes without defined tech steps—or tech without process context—lead to confusion.

UI/UX Optimization: Customize user interfaces to simplify experiences. Show only relevant fields, hide non-essential inputs, and ensure mobile compatibility where applicable.

Data Validation: Standardize formats for key fields (dates, IDs, emails) and enforce validation rules. Garbage in, garbage out.

Monitoring & Compliance: Establish automated systems (alerts, audits, scripts) to flag missing or inaccurate data.

Scalable Administration: Define roles, permissions, and governance models that work as your company grows. Delegate control responsibly without bottlenecks.

Vendor Independence: Store company data in a centralized, exportable data warehouse or neutral platform. This reduces switching costs if a vendor stops meeting your needs.

Bonus Tip: Conduct quarterly reviews of system usage and cost-benefit alignment. What's helpful for 5 users might not scale well at 50.



Section 3: People Audit

Your people are the drivers of every system and process. Organizational clarity and individual empowerment are essential for sustainable growth:

Org Structure: Maintain and share an up-to-date org chart that clearly shows reporting relationships and cross-functional ties. This supports decision-making and accountability.

Role Definition: Every position should have a role card or job description that defines key responsibilities, systems used, and performance expectations.

Onboarding Framework: Formalize onboarding with a structured plan for systems training, process immersion, and shadowing. Tailor it to each role.

KPIs & Development: Define measurable success metrics for each role, and pair them with a development plan tied to business objectives. Make growth a shared goal.

Career Pathing: Employees should see how they can grow within the organization. Career ladders with options for both vertical and lateral movement improve retention.

Innovation Mechanism: Create channels for employees to submit process improvements or new ideas. Consider innovation contests or monthly brainstorming sessions tied to real problems.

Bonus Tip: Conduct regular skip-level check-ins to surface ground-level insights leadership may miss.

Ready to Take Action?

If you answered "no" to more than a few of these questions, your business may be experiencing friction that limits scalability and profitability.

Visit www.7iog.com to schedule a free consultation. We'll help you align your operations with your growth goals.

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