



• A DIAGNOSTIC FOR FOUNDERS AND AGENCY OWNERS

The Operations Audit

Twenty questions that measure whether your business runs on systems or on people.
Answer them honestly and the score will tell you something your P&L will not.

TWENTY QUESTIONS · SCORED OUT OF FORTY · TAKES TEN MINUTES

Four things decide whether a business runs on systems or on people.

Documentation · Ownership · Measurement · Key-person concentration

WHERE YOUR SCORE LANDS

0 to 11

The business is you

12 to 21

Running on memory

22 to 31

Holding
but person-dependent

32 to 40

Systemised

Nobody scores forty. That is not the point.

The point is knowing which four answers you had to think hardest about.

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Answer as things are today, not as you **intend to fix them**.

The value of this is entirely in the honesty. A flattering score is worth nothing to you, and nobody else is going to see it unless you choose to send it to me.

SCORING

Two, one, or zero

2 if it is true today, consistently, without exception.

1 if it is partly true, or true for some of the business.

0 if it is not true, or you had to think about it for more than five seconds.

TIME

Ten minutes, once

Do not research the answers. If you cannot answer a question immediately, that is a zero, and the hesitation is itself the finding. Total the four sections at the end.

WHO

Better with two people

Score it yourself, then have someone senior score it separately without seeing yours. The questions where you disagree are usually the most expensive ones.

What the four sections measure, and why these four

Documentation. Whether the work exists anywhere outside a person's memory. Nothing can be delegated, automated or handed over until it does.

Ownership. Whether a specific named person is accountable, or whether accountability quietly defaults back to you.

Measurement. Whether you can see what is happening without asking. Unmeasured work cannot be improved, and problems surface late and expensive.

Key-person concentration. What would actually happen if you were unavailable. This is the one most owners answer instantly, which tells you the answer was never in doubt.

ONE RULE

If your answer starts with "well, normally", it is a one. If it starts with "it depends who", it is a zero.

Documentation

Does the work exist anywhere
outside somebody's head?

0 not true 1 partly 2 true today

01

A new hire could run our client onboarding from a written document, without asking anyone.

0

1

2

02

Our three most repeated workflows exist in writing, not just in someone's head.

0

1

2

03

Month-end close has a written procedure that someone else could follow.

0

1

2

04

When someone leaves, we hand over a document rather than a two-hour call.

0

1

2

05

Our written procedures were reviewed or updated in the last six months.

0

1

2

SECTION A SUBTOTAL

WHICH OF THESE FIVE DID YOU HESITATE ON, AND WHY?

WHY THIS SECTION COMES FIRST

Every other section depends on it. You cannot give someone ownership of a process that has never been written, and you cannot automate one either.

Ownership

Is a specific named person accountable, or is it you by default?

0 not true 1 partly 2 true today

06

Every recurring task has a named owner who is not me.

0

1

2

07

My team makes decisions in their own area without routing them through me first.

0

1

2

08

Our main client relationships are held by more than one person.

0

1

2

09

Someone other than me can approve spend up to a defined limit.

0

1

2

10

There is a named second person for every critical system, tool and account.

0

1

2

SECTION B SUBTOTAL

NAME THE TASKS THAT CURRENTLY HAVE NO OWNER BUT YOURS.

THE TEST UNDERNEATH THESE FIVE

If a task has no name against it, it has your name against it. That is true whether or not anyone has ever said so out loud.

Measurement

Can you see what is happening without having to ask?

0 not true 1 partly 2 true today

11

I know today which projects are at risk, without asking anyone.

0

1

2

12

Status reporting arrives on a schedule without anyone requesting it.

0

1

2

13

We measure how long our recurring work actually takes, not how long we assume.

0

1

2

14

Overdue work surfaces automatically, rather than when somebody happens to notice.

0

1

2

15

I could state this week's billable utilisation without building a report first.

0

1

2

SECTION C SUBTOTAL

WHAT WOULD YOU HAVE TO ASK SOMEONE TO FIND OUT TODAY?

WHAT A LOW SCORE HERE COSTS

Problems still happen. You just meet them later, when they are more expensive to fix and harder to explain to a client.

Key-person concentration

What actually happens when you are not there?

0 not true 1 partly 2 true today

16

I could be unreachable for two weeks and delivery would not slow down.

0

1

2

17

Nothing important lives only in my inbox, my phone or my head.

0

1

2

18

Revenue does not depend on my personal relationships specifically.

0

1

2

19

I have taken a full week off in the last twelve months without working.

0

1

2

20

If I stopped tomorrow, someone could run this business for ninety days.

0

1

2

SECTION D SUBTOTAL

WHAT BREAKS FIRST, AND ON WHICH DAY?

THE ONE PEOPLE ARGUE WITH

Question 19 is not about work-life balance. It is a test of whether the business can operate without you, and it happens to have a yes or no answer.

Your score, and what it **actually** means.

Nobody scores forty. The number matters less than which section dragged it down, because that tells you where to start.

Total out of 40

Section A + B + C + D

ABCD

0-11	The business is you This is not a failing, it is the normal state of a business that grew faster than its documentation. But you are the operation, not the owner of one, and every growth decision from here will make that worse rather than better.
12-21	Running on memory Things work because good people remember them. It holds until someone leaves, someone is ill, or you take on more volume than memory can carry. Most owners I speak to land here.
22-31	Holding, but person-dependent Real structure exists in parts of the business and not others. Usually the newest or noisiest areas got documented and the oldest ones never did. Your lowest section is your risk.
32-40	Systemised The business can run without any one specific person, including you. Protect it deliberately, because growth erodes this faster than anything else and it degrades quietly.

READ IT THIS WAY

Ignore the total for a moment. Which single section scored lowest? That is not a weakness to improve someday. That is where your next expensive surprise is going to come from.

Fix the lowest section first, and only **three things** in it.

Trying to lift all four sections at once is how this ends up as a document nobody opens again. Pick the lowest, take the three questions you scored zero on, and work only on those.

IF A IS LOWEST

Start writing, not reorganising

Take the three most repeated workflows. Have someone observe them and draft the procedure from what actually happens, not from what is supposed to. You correct the draft. That takes ten minutes; writing one from nothing never gets started.

IF B IS LOWEST

Put names against things

Every recurring task gets one named owner and a defined limit of authority. Not a committee, not a team, a person. Then stop answering questions that belong to them.

IF C OR D IS LOWEST

Make status arrive on its own

Reporting that has to be requested is not reporting. Get blocked, overdue and at-risk work surfacing on a schedule, then test D directly by being unreachable for a week on purpose.

IF YOU WOULD RATHER NOT DO IT YOURSELF

This is the work I do. Documenting what only lives in someone's head, putting names against it, then automating the parts that repeat. Usually in that order, over about ninety days.

Send me your score

Tell me your total and which section was lowest. I will send back the three things I would do first, whether or not you ever hire me.
Available now for remote Chief of Staff, Operations and Senior EA work.

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