

Control your Operations Checklist

Operational Efficiency
Self-Assessment Checklist

How much operational friction exists in your day-to-day workflows?

Small delays and disconnected processes often build gradually across order processing, stock management and day-to-day operations.

This checklist is designed to help identify where operational bottlenecks, manual work and visibility gaps may be slowing your business down.



Order Processing

Can teams see order status instantly without checking multiple systems?

Do orders move through the process without repeated manual updates?

Is customer, pricing and stock information available in one place?

Are delays and exceptions visible before they affect fulfilment?

Can teams process orders without relying on spreadsheets or workarounds?

Stock & Inventory Visibility

Can teams trust the stock information they see on screen?

Is stock availability updated in real time?

Can purchasing and operations teams work from the same inventory information?

Are supplier updates reflected quickly across the business?

Can teams identify stock issues before they delay orders?

Connected Systems & Workflows

Are operational systems connected across pricing, stock, purchasing and finance?

Does information update automatically across workflows?

Do teams avoid re-entering information between systems?

Can operational teams access the information they need without chasing updates?

Is reporting based on consistent operational data?

Approvals & Administration

Are approval processes fast and easy to manage?

Can teams identify stalled orders or bottlenecks quickly?

Is manual administration kept to a minimum?

Are teams spending more time progressing work than chasing information?

Can operational issues be identified early rather than after delays occur?

Automation & Decision-Making

Are repetitive operational tasks automated where possible?

Can teams access operational information quickly and confidently?

Are issues surfaced early enough to take action?

Do teams have visibility of operational performance in real time?

Can decisions be made without relying on disconnected reports?

Results

If several of these questions highlighted gaps or operational friction, there may be opportunities to improve visibility, reduce delays and streamline workflows through more connected operations.

Download The Connected Operations Playbook

Explore practical ways to reduce operational friction through connected workflows and better visibility.

