

FREE RESOURCE

Practice Operations Health Scorecard

Twelve yes/no questions that show you, in five minutes, where your practice is leaking.

How to score

Answer honestly. Give yourself 1 point for every "yes." Total your score at the end.

Prospect follow-up

- ☐ Every open prospect has a next action with a date.
- ☐ No prospect has gone more than 7 days without contact.
- ☐ You can name your three hottest prospects without opening your CRM.

Onboarding

- ☐ Every new client follows the same documented onboarding steps.
- ☐ You know exactly which clients are mid-onboarding right now.
- ☐ First review meetings are scheduled within 30 days of signing.

Client service

- ☐ Every client has a scheduled next review or touchpoint.
- ☐ No client has gone 6+ months without meaningful contact.
- ☐ Service requests are logged with an owner and a resolution date.

Team & systems

- ☐ Everyone knows who owns what — responsibilities are written down.
- ☐ Key procedures exist as SOPs, not just in someone's head.
- ☐ You review operations (not just revenue) at least monthly.

Your score

- **10-12:** Healthy. Keep the rhythm; consider monthly reviews to stay there.
- **6-9:** Leaking. Pick the lowest section and fix it first — that is your bottleneck.
- **0-5:** At risk. Prospects and clients are slipping. This is exactly what an operations setup fixes.

Want this built into your practice?

Book a free practice operations assessment at ajghosh.com