

FREE RESOURCE

Weekly Operations Review Checklist

A 30-minute Monday agenda that keeps follow-up, onboarding, and service from drifting.

The Monday review — 30 minutes

Same time every week. Advisor plus whoever touches operations. One page of notes, decisions logged with owners and dates.

Checklist

- ☐ Overdue follow-ups: every prospect past their next-action date gets a new date or a close-out decision.
- ☐ Prospects without next actions: none allowed. Every open prospect leaves the meeting with one.
- ☐ Onboarding pipeline: each client mid-onboarding — what is the next step, who owns it, when is it due?
- ☐ Service requests: anything open more than 5 business days gets escalated or explained.
- ☐ Team blockers: what is each person waiting on? Unblock it or reassign it.
- ☐ One improvement: pick one friction point from the week and fix the process, not the person.

The rule

You review operations, not just revenue. Revenue tells you what happened. Operations tells you what is about to happen.

Want this built into your practice?

Book a free practice operations assessment at ajghosh.com