

PRIMA
BUSINESS AGENCY

THE OPERATIONAL AUDIT · FOR SERVICE BUSINESSES

The R.A.T.I.O. Operational Audit Checklist

A 45-point diagnostic for owners who need structure, not strategy.

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Clarity Creates Capacity.™

START HERE

How to use this checklist.

This document is a diagnostic. Not a strategy guide. Not a course. Not a list of motivational tips. It is the same 45-point operational audit Prima uses with private clients to surface exactly where structure is missing, failing, or broken — and where to start fixing it.

HOW IT WORKS

- Work through every section honestly. Check (,) every item that is fully in place — not partially, not in progress.
- Count the unchecked items at the end. Sections with three or more gaps are your immediate operational priorities.
- Each item is mapped to one of the five steps of the R.A.T.I.O. Method™. That tells you where to start in the framework.
- Use the scoring guide at the end to interpret your readiness level.

WHAT THIS IS NOT

- This is not a productivity tracker.
- This is not a personality test.
- This is not a marketing audit.
- It is an operational diagnostic — designed to expose where your business is structured around you instead of supported by systems.

Mess is not a personality trait. It is an operational gap.

THE FRAMEWORK

The R.A.T.I.O. Method™

Prima's proprietary operational framework. Every item in this checklist maps to one of the five steps below.

R	RECLAIM	Recover leadership time from operational noise. Identify where your time is leaking and stop it.
A	AUDIT	Examine what's working, what's failing, and what's missing. You cannot fix what you haven't examined.
T	TRANSFER	Move execution to the right people and systems. Build for repeatability, not heroics.
I	IMPACT	Connect every operational decision to business outcomes. If it doesn't move the work forward, it's overhead.
O	ORGANIZE	Build infrastructure that outlasts any single person — including you.

SECTION 1 · LEADERSHIP & TIME

R · RECLAIM

How leadership time is spent. Where decisions live. What only the owner can do — and what only the owner is doing because no one else has been trained.

- Owner's role is documented with clear responsibilities and decision authority.
- Owner has protected weekly time for strategic work — not just execution.
- Owner can leave the business for 5 business days without operations breaking down.
- A 'Not My Job' list exists — tasks the owner has formally stopped owning.
- Leadership absence protocol exists: who makes decisions when the owner is unavailable.
- Decisions that recur more than once per week are documented, not improvised.
- Strategic plan exists and is reviewed at least quarterly.

SECTION 2 · CLIENT JOURNEY & DELIVERY

A · AUDIT

What happens between the first inquiry and the final invoice — and whether it runs the same way every time.

- Inquiry-to-onboarding process is documented and used by every team member.
- Client onboarding follows a written sequence — not the owner's memory.
- Delivery process is standardized regardless of who is leading the work.
- Client communication cadence is defined (when, how often, by whom).
- Offboarding process exists and is followed at the end of every engagement.
- Maximum client capacity per week or month is defined and respected.
- Client experience does not change depending on who is delivering the work.

SECTION 3 · TEAM & EXECUTION**T · TRANSFER**

Whether your team can execute without you in the room — and whether responsibility actually lives where the org chart says it does.

- Every team member has a written job description with clear responsibilities.
- Onboarding process for new team members is documented (not verbal).
- Performance check-ins happen on a scheduled cadence — not as-needed.
- Team members can answer 'who do I report to' and 'who reports to me' without hesitation.
- Recurring meetings have agendas and documented outcomes.
- Tasks delegated to the team stay delegated — they don't return to the owner within 30 days.
- Contractors and vendors have signed agreements with documented scope.

SECTION 4 · SYSTEMS & PLATFORMS**I · IMPACT**

Where your operational data and processes actually live — and whether anyone other than you can find them.

- One central project management platform is selected and actively used by the team.
- SOP library exists with at least 5 core processes fully documented.
- Client data lives in a CRM, not in email or spreadsheets.
- Cloud storage is organized with a consistent naming convention.
- Access permissions are documented (who can see what, who can edit what).
- Communication protocols are established (what goes in email vs. chat vs. meetings).
- Tools and subscriptions are reviewed annually for cost and continued use.

SECTION 5 · FINANCE & CAPACITY**I · IMPACT**

Whether your operational decisions are tied to financial outcomes — and whether growth is something you can actually sustain.

- Monthly revenue, expenses, and margin are reviewed on a set schedule.
- Cash flow forecast exists for the next 90 days.
- Pricing is documented and reviewed annually.
- Invoicing and collections follow a documented process (not ad-hoc).
- Maximum operational capacity is known — and growth plans respect it.
- Each service or offer has a documented profit margin.
- Bookkeeping is current within 30 days at all times.

SECTION 6 · GROWTH READINESS**O · ORGANIZE**

Whether your business is structured to grow — or whether the next stage will break what's currently working.

- At least one core process runs without owner involvement.
- New service or offer decisions follow a documented evaluation process.
- Key person dependency has been identified and discussed with leadership.
- Marketing pipeline is tied to operational capacity — not just to demand.
- Growth plan is a written document, not an idea in the owner's head.
- Quarterly operations review is scheduled and held consistently.
- Business can run for 30 days without the owner making any new decisions.

STEP 3 · SCORE YOUR READINESS

How to read your results.

Count every checked box. Then match your total to the scoring guide below.

38 - 45 CHECKED	Operationally ready. Your foundation is solid — maintain and refine quarterly.
28 - 37 CHECKED	Operationally functional. Target three gaps per month to close. You are closer than you think.
18 - 27 CHECKED	Operationally fragile. Prioritize Transfer and Organize steps immediately. Growth will magnify what is missing.
UNDER 18 CHECKED	Operational risk is high. Stabilize before pursuing growth. Start with Step 1 of the R.A.T.I.O. Method.

WHAT TO DO NEXT

- **Mark every unchecked item with a 30-day target date and a single owner. A gap without an owner stays a gap.**
- Address gaps in order of R.A.T.I.O. Don't skip ahead — Audit fails if Reclaim hasn't happened first.
- Re-run this checklist quarterly. Operational drift is real.

IF YOUR AUDIT REVEALED MORE GAPS THAN YOU EXPECTED

Here's where to start.

This checklist exposes the gaps. Closing them is the next step — and it is the work Prima Business Agency was built for.

We do not advise. We install. We design and implement the operational infrastructure required to run a stable, scalable business without constant owner involvement.

BOOK A FREE CLARITY CALL

30 minutes. No pitch. We identify your top operational priority and tell you exactly where to start.

primabusinessagency.com

THREE OTHER WAYS TO WORK WITH US

- Ops Diagnostic · A full operational audit. We surface what is working, what is failing, and exactly where to start.
- Operational Build · Done-for-you SOPs, workflows, and systems. We build the backend you need to scale.
- Fractional COO Retainer · Ongoing operational leadership. We run your backend so you can run the business.

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