

Agency Ops Audit

40-point checklist to find where your operations are breaking. Be honest — the gaps you find are your roadmap.

SCORING: 35–40 = Strong. 25–34 = Functional but leaky. Below 25 = You need a proper system.

1. Project Management

- Every active project has a clear owner
- Every project has a defined deadline visible to the whole team
- Project status can be seen in one view without asking anyone
- Overdue tasks are flagged automatically — not manually
- You know at any point what's blocked and why
- Clients are not the ones chasing you for updates
- New projects can be set up in under 15 minutes
- Your PM tool reflects reality — not just what you wish was happening

2. Client Communication

- Every client knows the expected response time for messages
- Client updates are sent proactively, not reactively
- There is a documented process for handling client feedback
- Client requests don't go directly into your personal inbox
- You have a clear escalation path for unhappy clients
- You don't repeat yourself explaining the same things to clients

3. Team Clarity

- Every team member knows their priorities for the week without asking you
- Your team can complete core work without your involvement
- Handoffs between team members are documented, not verbal
- New team members can be onboarded in under 3 days
- Your team knows where to find answers — not just who to ask
- Meeting time per week is under 5 hours per person
- There is no single person the whole operation depends on

4. Process & Documentation

- Your top 5 recurring processes are documented as SOPs
- SOPs are stored where the work happens — not in a forgotten folder
- SOPs are up to date (reviewed in the last 6 months)
- You have a documented client onboarding process
- You have a documented client offboarding process

- Recurring tasks are templated so they don't get rebuilt from scratch
- You know immediately when a process breaks down

5. Tool Usage

- Your team uses one primary project management tool — not three
- Your tool setup reflects how you actually work, not a default template
- Critical information is not stored in Slack DMs or email threads
- Automations are handling at least 3 repetitive tasks
- You could hand your tools to someone new and they'd understand them

6. Founder Dependency

- The business can operate for 1 week without your daily input
- Your team makes decisions without running everything past you
- Revenue doesn't stop if you take a week off
- Delivery quality doesn't drop without your direct involvement
- You are not the only one who knows how things work
- Client relationships are not 100% dependent on you personally
- You spend more time on strategy than on operational tasks

YOUR SCORE

| Score | What it means |
|----------|---|
| 35–40 | Strong ops foundation. Ready to scale. |
| 25–34 | Functional but leaky. Fix gaps before you grow. |
| 15–24 | Founder is the bottleneck. Needs a system urgently. |
| Below 15 | Reactive mode. Stop hiring until ops are fixed. |

Scored below 30? A Runflow build fixes the gaps in 5–7 days. runflowagency.com