



Service Description

Operations Audit

What is it?

An audit, sometimes called an environmental scan, is a process aimed at identifying, documenting and analyzing the status quo within your company. The ultimate goal is to figure out how to improve. The main activity involves a series of interviews with various staff members. In addition, I may request access to company systems and review internal documentation. In some circumstances, I may also conduct surveys if a wider number of opinions and perspectives are deemed necessary.

Why do it?

The purpose is to formally document the methods, strategies, challenges and any other general findings in order to provide fresh eyes on how a company operates to formally draw out challenges and bottlenecks that limit the company's potential for success. In most cases, the findings should not be surprising to leadership, however having it formally documented provides an additional level of validation, and helps deliver clarity.

What topics do I cover?

Topics can be wide ranging and depend on the client, however the most common are:

- Internal communication
- External communication
- Work management
- Document management
- People management
- Corporate strategy
- Project management
- Process management
- Training

Additional interview topics are covered on a function or role specific basis.

What do you get?

I will summarize the interview responses and any other information I receive and generate several reports. The reports are as follows:

1. **Summary of Findings:** I will synthesize the knowledge gained during the information collection and present a summary of what I have found. This may be anything learned during the interview process, or from reviewing company documents, systems or otherwise. Findings may include commentary on corporate structure, strategy, staffing, skills, communication, work design, organization, technology, or otherwise.
2. **Technology Stack Map:** I will build a list of the various tools used by company staff. This will be presented in two perspectives: 1 - List of tools used; 2 - List of functions and the tools that support them.

- 3. Proposed Solutions:** I will take the findings and come up with a series of suggested solutions that will help overcome the identified challenges. These will form the basis of projects that we will create to solve the challenges facing a company. It should be noted that recommended solutions are not limited to technology and may include anything that supports the organization's overall strategy and helps you improve.

How long does it take?

Completing an operations audit is a fairly well-defined process resulting in a series of structured reports. As the main activity involves a series of interviews, this schedule will determine how quickly the reports can be completed. For highly engaged clients who are readily available to meet, we can complete this in as little as four to six weeks.

How much does it cost?

This service is a fairly well-defined set of activities; thus, it will most likely be paid through a fixed scope contract. The price will be determined once we have discussed your expectations, goals, and the complexity and size of your business.