



OPERATING CLARITY ASSESSMENT

See the operation more clearly before deciding what to change.

A practical self-assessment for identifying operating patterns worth investigating across promises, ownership, flow, operating truth, and sustainable capability.

Complete it your way.

Use this printable worksheet for reflection or leadership discussion, then enter your responses online to request a personalized interpretation.



Online form: <https://www.scalethatworks.com/assessment-form>

Estimated time: 8 to 10 minutes

A useful starting point

This structured self-reflection helps identify operating patterns worth investigating. It is designed to inform better questions and next steps, not to replace direct observation, stakeholder interviews, or review of operating evidence.

Board Room Thinking. Break Room Practicality.

HOW TO USE THIS ASSESSMENT

Answer from operating reality, not operating intention.

Base your responses on the operation, team, site, function, or workflow you know most directly. Respond based on what typically happens today, not what policy says should happen or what leadership intends to happen.

1	Rarely true
2	Occasionally true
3	Sometimes true
4	Usually true
5	Consistently true
-	Not sure / insufficient visibility

Do not force a score. "Not sure" is useful information. It may point to limited visibility, unclear measurement, fragmented ownership, or distance from the work.

After completing the worksheet: enter the same responses in the online form. If you authorize follow-up, Scale That Works will review the pattern and send a personalized interpretation within three business days.

PRIVACY NOTICE

Scale That Works uses submitted information to review the assessment, provide authorized follow-up, and manage the resulting business inquiry. Do not submit passwords, protected health information, confidential customer information, or other sensitive personal data. Full notice: <https://www.scalethatworks.com/privacy>

Provide enough context to interpret the responses.

1. Your name

2. Email address

3. Phone number (optional)

4. Preferred follow-up (optional)

- ☐ Email ☐ Phone call ☐ Text message ☐ No preference

5. Organization or company

6. Your role or title

7. Which industries or operating environments best describe the operation you are assessing? Select all that apply.

- | | |
|--|---|
| ☐ Healthcare delivery or pharmacy | ☐ Customer service or contact center |
| ☐ Fulfillment, logistics, or distribution | ☐ Manufacturing or production |
| ☐ Professional or business services | ☐ Financial services or back-office processing |
| ☐ Technology or digitally enabled services | ☐ Retail or multi-site operations |
| ☐ Private equity or investment-related operations | ☐ Other |

8. Approximately how many people are included in the operation you are assessing?

- | | | |
|--|--|-------------------------------------|
| ☐ Fewer than 25 | ☐ 25 to 99 | ☐ 100 to 499 |
| ☐ 500 to 1,999 | ☐ 2,000 or more | ☐ Not sure |

9. What are you assessing?

- | | | |
|---|--|---|
| ☐ Entire organization | ☐ Business unit | ☐ Site or facility |
| ☐ Function or department | ☐ Process or workflow | ☐ Other |

Describe the operation today.

Select all that apply. These answers provide context; they are not scored.

10. Which of the following best describe your current operating environment?

- | | |
|--|--|
| ☐ We are growing quickly. | ☐ We are integrating an acquisition, merger, or new business. |
| ☐ We are restructuring roles, teams, or reporting relationships. | ☐ We are launching a new site, service, product, or operating model. |
| ☐ Performance is generally strong and dependable. | ☐ Performance is inconsistent across teams, shifts, sites, or customer groups. |
| ☐ Results depend heavily on a few experienced people. | ☐ Leaders spend significant time resolving escalations or recurring problems. |
| ☐ Work frequently stalls between teams, functions, shifts, or systems. | ☐ Priorities compete or change frequently. |
| ☐ Staffing or capacity has not kept pace with demand or complexity. | ☐ We have strong frontline knowledge, but ideas and improvements do not consistently scale. |
| ☐ Formal metrics appear healthy, but employees or customers may experience the operation differently. | ☐ We are considering automation, AI, or workflow redesign. |
| ☐ We are preparing for investment, diligence, transition, or a leadership change. | ☐ We are stable but want to improve before problems become urgent. |
| ☐ Other | |

11. What prompted you to complete the assessment at this time?

- | | |
|---|---|
| ☐ A recent performance issue or missed commitment | ☐ A new leadership role or leadership transition |
| ☐ Growth, expansion, or a new operating model | ☐ An acquisition, integration, or restructuring |
| ☐ A planned investment or diligence process | ☐ Concern about ownership, handoffs, or accountability |
| ☐ Concern about workload, capacity, or recurring escalation | ☐ Interest in automation, AI, or workflow redesign |
| ☐ A desire to strengthen the operation before problems become urgent | ☐ Preparation for a leadership or strategy discussion |
| ☐ General reflection or benchmarking | ☐ Other |

Promise Clarity

Whether people understand the important commitments the operation must keep, who depends on them, and how competing priorities are resolved.

12. People understand the most important commitments our operation is responsible for keeping.

☐ Rarely true
 ☐ Occasionally true
 ☐ Sometimes true
 ☐ Usually true
 ☐ Consistently true
 ☐ Not sure / insufficient visibility

Notes / evidence / examples

13. Teams understand who depends on their work and what those people need from them.

☐ Rarely true
 ☐ Occasionally true
 ☐ Sometimes true
 ☐ Usually true
 ☐ Consistently true
 ☐ Not sure / insufficient visibility

Notes / evidence / examples

14. When priorities compete, people know which commitment should take precedence.

☐ Rarely true
 ☐ Occasionally true
 ☐ Sometimes true
 ☐ Usually true
 ☐ Consistently true
 ☐ Not sure / insufficient visibility

Notes / evidence / examples

15. Leaders explain why operating targets matter, not only what the targets are.

☐ Rarely true
 ☐ Occasionally true
 ☐ Sometimes true
 ☐ Usually true
 ☐ Consistently true
 ☐ Not sure / insufficient visibility

Notes / evidence / examples

16. When an important commitment is at risk, it becomes visible early enough for people to respond.

☐ Rarely true
 ☐ Occasionally true
 ☐ Sometimes true
 ☐ Usually true
 ☐ Consistently true
 ☐ Not sure / insufficient visibility

Notes / evidence / examples

Ownership and Handoffs

Whether work, decisions, exceptions, and transfers between people or groups are clearly owned.

17. Important work has a clearly understood owner from beginning to end.

☐ Rarely true ☐ Occasionally true ☐ Sometimes true ☐ Usually true ☐ Consistently true ☐ Not sure / insufficient visibility

Notes / evidence / examples

18. People know who is responsible for making decisions when work falls outside the standard process.

☐ Rarely true ☐ Occasionally true ☐ Sometimes true ☐ Usually true ☐ Consistently true ☐ Not sure / insufficient visibility

Notes / evidence / examples

19. Work transfers cleanly between people, shifts, teams, functions, and systems.

☐ Rarely true ☐ Occasionally true ☐ Sometimes true ☐ Usually true ☐ Consistently true ☐ Not sure / insufficient visibility

Notes / evidence / examples

20. When a handoff fails, the operation identifies where it failed rather than simply blaming another group.

☐ Rarely true ☐ Occasionally true ☐ Sometimes true ☐ Usually true ☐ Consistently true ☐ Not sure / insufficient visibility

Notes / evidence / examples

21. Important information reaches the person responsible for acting on it in time to change the outcome.

☐ Rarely true ☐ Occasionally true ☐ Sometimes true ☐ Usually true ☐ Consistently true ☐ Not sure / insufficient visibility

Notes / evidence / examples

Flow and Capacity

How predictably work moves and whether demand, staffing, priorities, and recurring problems are managed structurally.

22. Work generally moves through the operation without unnecessary waiting or accumulation.

- ☐ Rarely true ☐ Occasionally true ☐ Sometimes true ☐ Usually true ☐ Consistently true ☐ Not sure / insufficient visibility

Notes / evidence / examples

23. People can distinguish truly urgent work from work that is simply loud, visible, or recently escalated.

- ☐ Rarely true ☐ Occasionally true ☐ Sometimes true ☐ Usually true ☐ Consistently true ☐ Not sure / insufficient visibility

Notes / evidence / examples

24. Staffing, workload, and capacity are adjusted when demand or work complexity changes.

- ☐ Rarely true ☐ Occasionally true ☐ Sometimes true ☐ Usually true ☐ Consistently true ☐ Not sure / insufficient visibility

Notes / evidence / examples

25. Recurring problems are prevented or redesigned rather than repeatedly recovered through extra effort.

- ☐ Rarely true ☐ Occasionally true ☐ Sometimes true ☐ Usually true ☐ Consistently true ☐ Not sure / insufficient visibility

Notes / evidence / examples

26. People can complete important work without routinely depending on overtime, escalation, or heroics.

- ☐ Rarely true ☐ Occasionally true ☐ Sometimes true ☐ Usually true ☐ Consistently true ☐ Not sure / insufficient visibility

Notes / evidence / examples

Operating Truth

Whether leaders, employees, measures, and direct experience present a sufficiently congruent view of the operation.

27. The way leaders describe the operation generally matches what employees and customers experience.

- ☐ Rarely true
 ☐ Occasionally true
 ☐ Sometimes true
 ☐ Usually true
 ☐ Consistently true
 ☐ Not sure / insufficient visibility

Notes / evidence / examples

28. People can raise uncomfortable operating truths without being punished, dismissed, or labeled as active.

- ☐ Rarely true
 ☐ Occasionally true
 ☐ Sometimes true
 ☐ Usually true
 ☐ Consistently true
 ☐ Not sure / insufficient visibility

Notes / evidence / examples

29. Performance measures are clearly defined, trusted, and understood by the people expected to use m.

- ☐ Rarely true
 ☐ Occasionally true
 ☐ Sometimes true
 ☐ Usually true
 ☐ Consistently true
 ☐ Not sure / insufficient visibility

Notes / evidence / examples

30. Leaders look beyond averages to understand meaningful differences across shifts, teams, sites, ducts, or customer groups.

- ☐ Rarely true
 ☐ Occasionally true
 ☐ Sometimes true
 ☐ Usually true
 ☐ Consistently true
 ☐ Not sure / insufficient visibility

Notes / evidence / examples

31. When formal reports conflict with what people observe in the work, the difference is investigated rather n ignored.

- ☐ Rarely true
 ☐ Occasionally true
 ☐ Sometimes true
 ☐ Usually true
 ☐ Consistently true
 ☐ Not sure / insufficient visibility

Notes / evidence / examples

Capability and Sustainability

Whether knowledge, judgment, problem-solving, and improvement capability are distributed broadly enough to endure.

32. Critical knowledge is shared broadly enough that the operation does not depend excessively on a few individuals.

☐ Rarely true
 ☐ Occasionally true
 ☐ Sometimes true
 ☐ Usually true
 ☐ Consistently true
 ☐ Not sure / insufficient visibility

Notes / evidence / examples

33. New employees are taught the reason behind important work, not only the required steps.

☐ Rarely true
 ☐ Occasionally true
 ☐ Sometimes true
 ☐ Usually true
 ☐ Consistently true
 ☐ Not sure / insufficient visibility

Notes / evidence / examples

34. People are encouraged to identify and improve workarounds rather than simply hide or tolerate them.

☐ Rarely true
 ☐ Occasionally true
 ☐ Sometimes true
 ☐ Usually true
 ☐ Consistently true
 ☐ Not sure / insufficient visibility

Notes / evidence / examples

35. Teams can solve routine operating problems without waiting for senior leadership or an outside expert.

☐ Rarely true
 ☐ Occasionally true
 ☐ Sometimes true
 ☐ Usually true
 ☐ Consistently true
 ☐ Not sure / insufficient visibility

Notes / evidence / examples

36. Improvement continues after the initial leader, project team, or advisor steps away.

☐ Rarely true
 ☐ Occasionally true
 ☐ Sometimes true
 ☐ Usually true
 ☐ Consistently true
 ☐ Not sure / insufficient visibility

Notes / evidence / examples

Numbers alone cannot capture the full operating context.

Use these prompts to record what most deserves attention and what is already worth building on.

37. What is the one operating concern you most want to understand more clearly?

Optional but encouraged

38. What is one aspect of the operation that you believe is working especially well?

Optional but encouraged

39. Is there anything else about the operation or your responses that would be helpful for us to understand?

Optional

40. May Scale That Works contact you with a personalized interpretation of your responses?

☐ Yes

☐ No

Ready to submit?

Enter your answers at the branded web address or scan the QR code. If you authorize follow-up, you will receive a personalized interpretation identifying operating patterns worth investigating, practical questions to consider, and any relevant next step.



<https://www.scalethatworks.com/assessment-form>

This assessment identifies patterns worth investigating. It does not independently validate root causes or prescribe an operating-model redesign.