



Operations & Resilience Action Worksheet

Chapter Focus: Operational Management (OM), Workflow Design, and Measuring Performance for Business Resilience

Goal: Build a scalable, agile operational foundation that withstands disruptions and frees up your time to grow.

Part 1: Operational Diagnostic & Maturity Matrix

Operations Management is the circulatory system of your company. Map where your business currently stands across the three operational growth levels.

Growth Level	Stage Focus	Operational Reality	Key Milestone
Level 1: Solo & Survival	Foundations & Basics	Processes live in your head; reactive day-to-day execution.	Documenting your first core customer process.
Level 2: Standardizing	Consistency & Tools	Workflows are mapped, stored centrally, and shared with team/contractors.	Building a centralized SOP database (e.g., Confluence).
Level 3: Scaling & Agility	Optimization & Data	Processes are automated; decisions are driven by OKRs and KPIs.	Continuous feedback loops; rapid service pivot capacity.

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Self-Reflection: Which Level best describes your operations today? What is the single biggest operational bottleneck holding you back?



“Don’t get overwhelmed. Start simple with one critical, frequently repeated area.”

Select one critical customer-facing process (e.g., initial inquiry, order intake, service delivery).

- **Trigger** (What initiates this process? e.g., incoming call, signed contract):

Draw a simple linear flowchart connecting the Trigger to the Final Outcome using the formula:

```
graph LR
    A[Incoming Request] --> B[Assess Needs]
    B --> C[Accept]
    B --> D[Decline]
    C --> E[Onboarding Process]
    E --> F[Log Data]
    D --> G[Follow-Up Process]
    G --> H[Log Data]
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$$[\quad] \rightarrow [\quad] \rightarrow [\quad] \rightarrow [\quad] \rightarrow [\quad]$$



Part 3: Level 2 Worksheets — Centralization & Communication Scenarios

1. Communication & Call Handling Matrix

Standardize phone or email interactions so anyone on your team can deliver high-quality, professional service.

Scenario	Standard Script / Recommended Phrase	Required Operational Action
Standard Greeting	"Thank you for calling [Company], my name is [Name]. How can I help you today?"	Answer within 2 rings; maintain a warm, welcoming tone.
Resolving Issue Directly	"I'm pulling up your account information now... I have updated that for you."	Log changes into CRM immediately.
Placing Caller on Hold	"May I place you on a brief hold while I check that information for you?"	Set a timer; check back in within 2 minutes.
Warm Transfer	"I'm going to connect you with [Name]. In case we get disconnected, is this the best callback number?"	Briefly explain the caller's situation to your colleague before connecting.

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2. Standard Operating Procedure (SOP) Hub Setup Checklist

Store your processes where they are accessible for training, onboarding, and delegation.

- * ☐ Choose a repository tool (e.g., Atlassian Confluence, Notion, Google Workspace).
- * ☐ Create folder structures for core business divisions (Sales, Service Delivery, HR/Onboarding).
- * ☐ Embed visual workflow charts and direct links to relevant document templates or CRMs.
- * ☐ Upload quick walkthrough videos (e.g., Loom recordings) for complex software processes.



Part 4: Level 3 Worksheets — Metrics, Measurement & Pivot Readiness

“OM relies on a continuous feedback loop: Baseline → OKRs → KPIs → Data Analysis → Adjust Workflows.”

1. Balanced Measurement Matrix (Leading vs. Lagging Indicators)

Balance before behaviors (leading) with after outcomes (lagging) to prevent bottlenecks.

[LEADING MEASURES] (Behaviors & Inputs - Predictive)	[LAGGING MEASURES] (Outcomes & Results - Historical)
▼	▼
• Calls made / Proposals sent	• Monthly Revenue Growth
• Response time to inquiries • Equipment preventive maintenance	• Customer Retention Rate • Net Profit Margin

Identify Metrics for Your Business:

▣ **Wildly Important Goal (WIG):**

▣ **Leading Measure (Behavior to track weekly):**

▣ **Lagging Measure (Outcome to evaluate monthly):**

2. Resilience & Pivot Playbook

When external shocks occur (market changes, supply chain disruptions), agile operations allow you to pivot services rapidly.

1. Supply Chain Audit: What critical products or supplies do you rely on? Do you have a secondary vendor or backup stock reserve?

2. Transferable Skills/Assets Inventory: What equipment, skills, or network connections does your business possess that could be repurposed during a disruption?

3. Bottleneck Identification: Which step in your core workflow breaks first when demand doubles or drops by 50%? How can you simplify that step today?