

# TECH OPS AUDIT

In order to discover where you are, and how happy you are, in your current state of scaling with technology and operations, you'll need to complete the current and desired future rankings to identify where to focus and prioritize your growth efforts. It is helpful to identify an owner for accountability and to track progress to your desired rating.

	Current Rating 0-5, 5 strongly agree	Desired Rating 0-5, 5 strongly agree
<p><b>BUSINESS PROCESSES</b> We have written Standard Operating Procedures (or SOPs), either checklists or workflows, that allow us to track and report on all activities happening in our firm. Everyone knows the tasks they are responsible for and nothing falls through the cracks.</p>		
<p><b>INTEGRATION</b> We have a data source of truth, or "HUB", for which the spokes, our technology, are all integrated.</p>		
<p><b>AUTOMATION</b> Automated, integrated technology is built into our workflows, so that we have minimal to no manual processes between systems.</p>		
<p><b>CLIENT EXPERIENCE</b> Our technology enhances our client service model for our ideal client persona and reinforces our value proposition.</p>		
<p><b>STAFF</b> We have the right roles assigned to the right people, appropriately distributed so our workflows run at the optimal level. Our entire firm adopts our workflows/SOP.</p>		
<p><b>STRATEGIC PARTNERS</b> We have industry strategic partners that assist us with our operations. (Example: SEI, Virtual Assistants, Marketing Ops)</p>		
<p><b>CHANGE MANAGEMENT</b> We are innovative and evolve with our TechOps. We meet on a regular basis to review and assess our workflows as needed.</p>		