

Small Business Operations Review Survey Template

All questions are optional. Follow each question's directions.
Write your answers to the open questions in the space provided.

Answer for the named business and completed quarter. Use records where available and choose 'Not sure' when the information is missing. Every question is optional. Do not include account balances, customer details, confidential contracts or employee names.

1. How clear was the business's main operating priority for the quarter?

- ☐ Very unclear
- ☐ Somewhat unclear
- ☐ Neither clear nor unclear
- ☐ Somewhat clear
- ☐ Very clear
- ☐ Not sure

2. Compared with the business's plan, how did customer demand develop during the quarter?

- ☐ Much lower than planned
- ☐ Somewhat lower than planned
- ☐ About as planned
- ☐ Somewhat higher than planned
- ☐ Much higher than planned
- ☐ No demand plan existed
- ☐ Not sure

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3. How often did delivery to customers miss the timing the business had agreed?

- ☐ Never
- ☐ Rarely
- ☐ Sometimes
- ☐ Often
- ☐ Always
- ☐ No customer deliveries in this period
- ☐ Not sure

4. What most limited the business's ability to complete planned work?

- ☐ Staff time or skills
- ☐ Equipment or systems
- ☐ Supplier availability
- ☐ Cash availability
- ☐ Unclear priorities
- ☐ Another constraint
- ☐ No major constraint
- ☐ Not sure

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5. How current was the information used to plan upcoming cash commitments?

- ☐ Updated at least weekly
- ☐ Updated at least monthly but less than weekly
- ☐ Updated less often than monthly
- ☐ No regular update
- ☐ Not involved in this information
- ☐ Not sure
- ☐ Prefer not to answer

6. If the person responsible for a critical daily task was unavailable, how clear was the cover arrangement?

- ☐ Very unclear
- ☐ Somewhat unclear
- ☐ Neither clear nor unclear
- ☐ Somewhat clear
- ☐ Very clear
- ☐ No cover arrangement
- ☐ Not sure

7. What one operating issue should be investigated first next quarter, and what record would help check it?
