ROGER BOWN
OPERATIONS / SUPPLY CHAIN / ERP

REVIEW DRAFT

Operational performance

5-minute management self-assessment

Where could your business improve service, margin or cash?

Use the last three months. Select one answer per row; base Yes on evidence.

Business / site ______________________ **Date:** __________

Yes = consistent | Partly = mixed | No = gap | Unsure = evidence missing

SELECT ONE RESPONSE PER STATEMENT	Yes	Partly	No	Unsure
01 Customer delivery and service				
01 We consistently deliver in full by the agreed customer date.	○	○	○	○
02 Delivery failures have clear causes and accountable owners.	○	○	○	○
03 Customer promises reflect available capacity and agreed margins.	○	○	○	○
02 Stock and planning				
04 Sales, operations and finance work to one achievable plan.	○	○	○	○
05 Stock levels protect service without tying up excess cash.	○	○	○	○
06 We understand why shortages and excess stock coexist.	○	○	○	○
03 Flow and capacity				
07 We know which constraint most limits profitable output.	○	○	○	○
08 Capacity plans reflect downtime, skills and quality losses.	○	○	○	○
09 Work flows without routine expediting or emergency overtime.	○	○	○	○
04 Profit and accountability				
10 We know the cost to serve our key customers and products.	○	○	○	○
11 Priority improvements have an owner, target and review date.	○	○	○	○
12 We verify the profit or cash impact of improvement actions.	○	○	○	○

Choose the issue that matters most

Start with a No that affects service, profit or cash. Use Partly to spot inconsistency and Unsure to identify evidence to check. Select your biggest priority below.

Priority to discuss: ______________________

Desired outcome: ______________________

Request an exploratory call

Clarify the issue, the evidence needed and a practical next step.

LET'S TALK