THE AG STRATEGIES

OPERATIONS AUDIT

Pinpoint what's slowing you down and build the systems that scale.

A 15-minute assessment to identify operational inefficiencies and unlock your business potential

Revenue Lost to Inefficiencies

Strategic Questions

Scaling a business is exciting—but messy.

As your company grows, your systems, team, and workflows get more complex. What once worked starts breaking down. Tasks take longer, miscommunications happen, and inefficiencies quietly eat away at your time and profits.

> **Key Statistic:** Studies show that businesses waste up to **30% of their revenue** due to inefficiencies in operations, misalignment, and outdated systems.

Yet, most entrepreneurs don't even realize where they're losing time, money, and energy—because when you're in the trenches, it's hard to spot the gaps.

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That's where this 15-minute Operations Audit comes in.

💡 **What You'll Discover**

In just a few minutes, you'll:

🔍 Identify the biggest inefficiencies holding your business back

🎯 Pinpoint where your processes, team, or tools are working against you

📍 Get a clear roadmap for improvement—without needing to overhaul everything

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PEOPLE & TEAM ALIGNMENT

01

Is your team working efficiently?

① Team Roles & Responsibilities

Does everyone on your team have clear roles and responsibilities?

1 – Not at all (We have no formal roles; people wear too many hats.)

2 – A little (There's some structure, but it's unclear who owns what.)

3 – Somewhat (Roles exist, but team members often step on each other's toes.)

4 – Mostly (We have defined roles, but they need refinement.)

5 – Completely (Everyone knows their role, and handoffs are seamless.)

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2 Communication & Collaboration

How efficiently does your team communicate and collaborate?

1 – Not at all (Messages get lost, miscommunication is common, and tasks fall through the cracks.)

2 – A little (We use multiple tools, but conversations are scattered and inefficient.)

3 – Somewhat (We have a structured system, but it's not always followed.)

4 – Mostly (Communication is smooth, but there's still occasional friction.)

5 – Completely (We have a strong collaboration process, and everyone stays aligned.)

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3 Project Completion

Are projects and tasks consistently completed on time?

1 – Not at all (We constantly miss deadlines and struggle with project management.)

2 – A little (Tasks get done, but things often run behind schedule.)

3 – Somewhat (Most projects are on track, but last-minute scrambling happens often.)

4 – Mostly (We meet deadlines with occasional hiccups.)

5 – Completely (We have clear workflows, and projects run smoothly.)

4 Hiring & Training

Do you have a strong hiring, onboarding, and training process?

1 – Not at all (We hire reactively with no real process.)

2 – A little (There's a rough structure, but it's inconsistent.)

3 – Somewhat (Basic process in place, but onboarding needs improvement.)

4 – Mostly (We have a structured hiring and onboarding system.)

5 – Completely (Our hiring, onboarding, and training process is seamless.)

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5 Decision-Making

Do team members waste time waiting for approvals or unclear direction?

1 – **Constantly** (Projects get delayed because decisions take too long.)

2 – **Often** (Waiting for feedback or decisions slows things down regularly.)

3 – **Sometimes** (Some approvals take longer than they should, but it's manageable.)

4 – **Rarely** (Most decisions are streamlined, with occasional delays.)

5 – **Never** (Our approval process is efficient, and work flows without roadblocks.)

PROCESSES & WORKFLOW EFFICIENCY 02

Are your systems supporting your growth?

6 Process Documentation

Do you have clearly documented processes for recurring tasks?

1 – Not at all (Everything is done from memory, and there's no consistency.)

2 – A little (Some processes are written down, but they're outdated or incomplete.)

3 – Somewhat (Basic SOPs exist, but they aren't fully followed.)

4 – Mostly (Most key processes are documented and used consistently.)

5 – Completely (Every recurring task has a clear, updated process.)

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7 Workflow Bottlenecks

Are there frequent bottlenecks, miscommunications, or dropped handoffs?

1 – All the time (Projects regularly get stuck or delayed.)

2 – Often (Communication breakdowns slow us down frequently.)

3 – Sometimes (Occasional issues arise, but we catch them quickly.)

4 – Rarely (Smooth handoffs with minor hiccups.)

5 – Never (Everything moves through our processes seamlessly.)

8 Performance Metrics

Are you tracking key business metrics to ensure efficiency?

1 – Not at all (We don't track or measure performance.)

2 – A little (We have data, but we don't analyze or use it effectively.)

3 – Somewhat (We track some metrics, but they're not driving decisions.)

4 – Mostly (We regularly review and optimize based on data.)

5 – Completely (Our business is fully data-driven.)

TECHNOLOGY & AUTOMATION

03

Are you leveraging the right tools?

9 Tool Integration

Do your business tools and software work well together?

1 – Not at all (We use multiple tools, and none of them integrate well.)

2 – A little (We have workarounds, but our tech stack is messy and disorganized.)

3 – Somewhat (Some integrations exist, but they're not fully optimized.)

4 – Mostly (Most of our tools connect and automate key processes.)

5 – Completely (Our systems work together seamlessly, requiring minimal manual input.)

10   Manual vs. Automated Work

Are you and your team spending too much time on manual work?

1 – All the time (Everything is done manually, and it's a huge time drain.)

2 – Often (We have some automations, but most work is still manual.)

3 – Sometimes (We've automated a few tasks, but there's room for improvement.)

4 – Rarely (Most of our routine work is automated, with a few exceptions.)

5 – Never (We rely on automation to handle most repetitive tasks.)

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11 System Organization

Are your systems updated, organized, and documented?

P **1 – Not at all** (Our systems are outdated and chaotic.)

P **2 – A little** (We have some structure, but it's not well maintained.)

P **3 – Somewhat** (Basic documentation exists, but it's incomplete.)

P **4 – Mostly** (Our systems are well-organized with minor gaps.)

P **5 – Completely** (Everything is fully documented and up-to-date.)

TIME & PRODUCTIVITY OPTIMIZATION 04

Are you working on the right things?

12　High-Impact Work Focus

How much of your time is spent on high-impact work?

1 – Rarely (I'm constantly stuck in admin work and low-value tasks.)

2 – Occasionally (I get to strategic work, but only after handling small tasks.)

3 – Sometimes (I spend some time on strategy, but not as much as I'd like.)

4 – Often (I dedicate time to high-impact tasks, with occasional distractions.)

5 – Almost always (I focus almost entirely on CEO-level tasks.)

13   Time Management System

Do you have a structured system for managing your time and priorities?

1 – **Not at all** (I work reactively and constantly feel behind.)

2 – **A little** (I try to plan my time, but it's inconsistent.)

3 – **Somewhat** (I have a system, but I don't always stick to it.)

4 – **Mostly** (I follow a structured approach with some flexibility.)

5 – **Completely** (My time is intentionally structured for maximum productivity.)

14 Meeting & Distraction Management

Do you (or your team) get easily distracted or bogged down in unnecessary meetings?

1 – All the time (Meetings and distractions consume most of our time.)

2 – Often (We have too many meetings, but they feel necessary.)

3 – Sometimes (Some meetings could be emails, but they aren't overwhelming.)

4 – Rarely (We keep meetings efficient and focused.)

5 – Never (Our team is highly disciplined with time management.)

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15   AI & Automation Usage

Are you using AI, automation, or delegation to maximize efficiency?

⚲   **1 – Not at all** (Everything is manual, and we're overloaded.)

⚲   **2 – A little** (We have some automation, but it's not widely used.)

⚲   **3 – Somewhat** (We've started using AI and automation, but it's not optimized.)

⚲   **4 – Mostly** (Many workflows are automated, with minor gaps.)

⚲   **5 – Completely** (AI and automation handle most of our routine work.)

CALCULATE YOUR SCORE

Time to total your scores and review the chart below to see how you score.

🖩 Your Operations Score

0

out of 75

📊 Calculate My Score

Score Interpretation

60-75	**Operations Optimized**	Your business runs like a well-oiled machine

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45-59	**Good Foundation**	Minor adjustments needed for peak performance
30-44	**Room for Improvement**	Significant efficiency gains available
15-29	**Critical Gaps**	Major operational overhaul needed
Below 15	**Starting Point**	Foundational systems require immediate attention

What's Next?

⚠️ **If your score is under 30, you're leaving time, money, and efficiency on the table.**

🚀 That's where I come in.

At AG Strategies, I specialize in optimizing operations for high-achieving entrepreneurs so they can scale without the breakdowns, bottlenecks, and inefficiencies.

⚙️ Need help implementing better systems?

📈 Want to streamline operations for maximum growth?

🤖 Looking for AI-powered solutions to increase efficiency?

Let's build your custom operations strategy

📅 **Book a Consultation**

Scaling should feel seamless. Let's optimize your operations
so your business runs at peak performance.

AI FOR BUSINESS: THE FUTURE IS NOW

How leading companies are leveraging AI to optimize operations and drive growth

The integration of Artificial Intelligence into business operations is no longer a futuristic concept but a present-day reality, with generative AI (gen AI) leading the charge.

65%

of organizations are regularly using generative AI

Nearly double from the previous year

50%

boost in productivity and creative problem-solving

Predicted by Forrester for 2024

78%

average likelihood of integrating Gen AI

Across business functions (Wharton Study)

Key Areas of AI Impact

Rewiring Organizations

Successful AI adopters are implementing AI tools and rewiring their organizations to capture value through talent development and process redesign.

Customer Experience

AI creates more personalized and efficient customer experiences, from intelligent chatbots to recommendation engines that anticipate needs.

Innovation Acceleration

Generative AI accelerates innovation by automating creative processes, from generating new product ideas to writing code.

The High Cost of Inefficiency

30%

of annual revenue lost to process inefficiencies

26%

of employee workday lost to inefficient processes

50%+

of businesses struggle with productivity-draining inefficiencies

The Benefits of Optimized Operations

↑ **25-95% increase in profits** from just 5% improvement in customer retention

✂ **Significant cost reduction** through elimination of redundancies and waste

★ **Enhanced service quality** leading to higher customer satisfaction and loyalty

◎ **Strategic focus** through automation of repetitive tasks

◆————————◆

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◆ ABOUT ALEXIS GOODREAU & AG STRATEGIES ◆

Alexis Goodreau

Founder, AG Strategies

Graduate of Shippensburg University of Pennsylvania

Alexis Goodreau is the founder of AG Strategies, a consultancy dedicated to helping high-achieving entrepreneurs, particularly in the Commercial Real Estate (CRE) sector, optimize their business operations.

With nearly a decade of experience, she specializes in transforming chaotic business processes into clear, efficient, and scalable systems.

Professional Background & Expertise

Business Operations Optimization

Nearly a decade of experience as a tech-savvy executive assistant and strategic partner to C-suite leaders

High-Level Strategy & Systems Consulting

Expert in transforming complexity into clarity and strategy into gold

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AI Integration & Smart Operations

Leading businesses into the future with AI-driven strategy and automation

Executive Business Management

Previous experience as Marketing Director with expertise in project management tools

AG Strategies: Core Services

"To turn complexity into clarity and strategy into gold."

🖊 The Digital Alchemist

A one-day deep dive to transform a business with AI-driven strategy and automation.

🏢 The Foundation

For businesses that need strategic clarity and optimized systems but want to execute in-house.

🚀 The Accelerator

For businesses that need both strategy and execution support.

👑 The Executive Partner / The Gold Standard

For high-level leaders who want a strategic right-hand to manage and optimize their business operations.

Ready to Transform Your Operations?

Let's work together to optimize your business systems and unlock your full potential.

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📅 Book a Strategic Consultation

AG STRATEGIES

Turning complexity into clarity and strategy into gold.

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