



everVine RESOURCE SERIES
CLARITY TOOLS

Business Operations Health Assessment

A practical assessment for evaluating the health of your
systems, workflows, and daily operations.



Rooted in Purpose. Grown for Impact.

everVine

Administrative, Executive & Operations
Support

evrvine.com

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Thank you for downloading this everVine Clarity Tool.

A thriving business isn't built by working longer hours. It's built by creating systems that provide clarity, consistency, and margin.

When daily operations are organized, communication is clear, and responsibilities are well defined, you spend less time reacting and more time leading. Healthy systems allow you to focus on serving clients, growing your business, and investing your energy where it matters most.

This assessment is designed to help you step back and evaluate the operational health of your business. Rather than measuring productivity alone, this assessment evaluates the health of the systems that support your work every day.

As you complete each section, rate yourself honestly. The goal isn't perfection. It's identifying opportunities for healthy, sustainable growth.

Healthy systems create margin for what matters most.

Our Mission

To create peace through clarity, healthy systems, and thoughtful stewardship, so leaders are free to fully invest in the purpose they've been called to fulfill.

About everVine

everVine partners with businesses and entrepreneurs by providing administrative, executive, and operational support that helps leaders stay focused on what only they can do.

From executive assistance and project management to workflow development, documentation, and business operations, our goal is simple:

To help businesses thrive through thoughtful support behind the scenes.



Rate each statement using the following scale:

Score	Meaning
1	Rarely True
2	Sometimes True
3	Usually True
4	Mostly True
5	Consistently True

Leadership

- ___ I have a clear vision for my business.
- ___ I review priorities every week.
- ___ My calendar reflects my highest priorities.
- ___ I spend time working on my business instead of only in it.
- ___ My workload is sustainable.

Section Score: ___ /25

Operations & Organization

- ___ My digital files are organized and easy to locate.
- ___ Important documents have a consistent home.
- ___ Recurring work follows documented processes.
- ___ My business runs from established systems instead of memory.
- ___ I rarely waste time searching for information.

Section Score: ___ /25

Client Experience

- ___ My onboarding process is consistent.
- ___ Clients know what to expect.
- ___ Communication is timely and organized.
- ___ Projects are tracked in one reliable location.
- ___ Follow-up happens consistently.

Section Score: ___ /25

Systems & Technology

- ___ My technology supports my workflow.
- ___ I use tools intentionally rather than adding unnecessary complexity.
- ___ My task management system stays current.
- ___ My passwords, logins, and digital assets are organized.
- ___ I regularly review and improve my systems.

Section Score: ___ /25

Capacity & Sustainability

- ___ I know how my time is being spent.
- ___ I have margin in my schedule.
- ___ I delegate appropriate responsibilities.
- ___ I regularly evaluate my workload.
- ___ My business could continue operating if I stepped away briefly.

Section Score: ___ /25

Communication & Follow-Through

- ___ I respond to important emails within my desired timeframe.
- ___ Client communication is proactive rather than reactive.
- ___ Meeting notes and action items are documented.
- ___ I have a reliable follow-up system.
- ___ Team members (or contractors) know where to find information.

Section Score: ___ /25

Scoring Your Assessment

Add your section totals.

Leadership & Planning ____

Operations & Organization ____

Client Experience ____

Systems & Technology ____

Capacity & Sustainability ____

TOTAL SCORE: ____/150

Your Results

126-150

Flourishing

Your operational foundation is strong. Continue refining your systems and looking for opportunities to improve efficiency while maintaining healthy rhythms.

101-125

Growing Strong

Many healthy systems are already in place, but a few targeted improvements could create greater consistency and free up valuable time.

76-100

Establishing Roots

Your business has solid potential, but inconsistent systems may be creating unnecessary stress or limiting your capacity. Focus on strengthening one area at a time.

0-75

Cultivating Change

Every healthy business starts somewhere. Prioritize building simple, sustainable systems that reduce overwhelm and create a stronger operational foundation.



Reflection & Next Steps

What area received your highest score?

What area needs the most attention?

What is one system you could improve this month?

What task consistently consumes more time than it should?

If you created five additional hours each week, how would you use them?

What is the ONE change you will commit to making this week?

everVine Perspective

Healthy businesses don't happen by accident.

They are built one thoughtful system, one intentional process, and one consistent habit at a time.

As your systems become healthier, your business becomes more sustainable, your leadership becomes more focused, and your capacity to serve others continues to grow.

Organization is not the destination. It is the support for the journey.



Ready for More Clarity?

If this assessment revealed opportunities to strengthen your systems, you don't have to navigate them alone.

everVine partners with business owners to create organized workflows, sustainable operations, and practical systems that support long-term growth.

Whether you need help organizing daily operations, documenting processes, improving communication, or creating more capacity, we're here to help you build a business that works with you—not against you.



How everVine Can Help

Healthy businesses don't grow because their leaders do everything themselves. They grow because strong systems support the work behind the scenes.

At everVine, we help business owners create organized workflows, streamlined operations, and dependable administrative support that reduce overwhelm and create space for strategic leadership.

From executive assistance and project management to documentation, digital organization, and operational systems, we help build the foundation that allows your business to grow with greater confidence and peace.

More clarity. More margin. More meaningful work.



Ready to Talk?

Whether you are exploring your options or ready to move forward, we would be honored to help you find the right solution for your needs.

Schedule a complimentary Discovery Conversation



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