

SHEVADA SOLUTIONS LLC

RN-Led Operations & Executive Administrative Consulting

QUICK CHECKLIST

RN-Led Operations:

The Healthcare Leader's Quick Checklist

10 signs your organization is ready for an operations consultant — and what to do about it.

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Is Your Organization Operationally Ready to Scale?

Check YES or NO for each statement. Be honest — the more accurate your responses, the more useful this checklist becomes.

01	Standardized Intake Our client or patient intake process produces the same experience regardless of which staff member handles it.	☐ YES ☐ NO
02	Documented Workflows Our most critical operational processes are written down in SOPs accessible to all relevant staff.	☐ YES ☐ NO
03	Staff Independence New staff can work independently within 2 weeks using written SOPs without constant supervision from leadership.	☐ YES ☐ NO
04	Delegation Operational decisions that should be delegated are handled by staff, not escalating to the owner or provider.	☐ YES ☐ NO
05	Referral Tracking All referrals and inquiries are tracked in a centralized system with documented follow-up protocols.	☐ YES ☐ NO
06	HIPAA-Aware Processes Our documentation and communication practices are designed with HIPAA compliance awareness built in.	☐ YES ☐ NO
07	Scheduling Systems Appointments are confirmed, reminded, and rescheduled through a documented workflow — not individual text messages.	☐ YES ☐ NO
08	Scalability We could add 20% more clients or patients without our current systems breaking down.	☐ YES ☐ NO
09	Compliance Readiness Our documentation practices are audit-ready and would hold up under a state survey or third-party review.	☐ YES ☐ NO
10	CRM & Business Systems We use a CRM or client management system that the entire team can access and update consistently.	☐ YES ☐ NO

Score Interpretation

8-10 YES	Strong Foundation	Your systems are solid. A consultation will identify optimization opportunities.
5-7 YES	Needs Improvement	Operational bottlenecks are likely affecting your productivity and growth daily.
0-4 YES	High Priority	Your business depends on people instead of documented systems. This is where we start.

Ready to Transform Your Operations?

→ Take the Free Healthcare Operations Assessment: shevada-solutions.com/free-assessment.html

→ Book a Complimentary 15-Minute Operations Review:
calendly.com/shevada-solutions-info/complimentary-15-minute-operations-review

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