Playbook Readiness Scorecard

This checklist will help you evaluate whether your business is prepared to create and implement a playbook effectively, ensuring the necessary foundations are in place for success.

Instructions

- Answer each question with either "**Yes**" or "**No**"
- Tally up your total "Yes" responses at the end

#	Checklist	Yes	No
1. Business Maturity Separation of Roles and Responsibilities:			
• Do you have distinct roles and responsibilities within your business?		☐	☐
• Is there more than one person handling different tasks?		☐	☐
• Do you have or can you assign a designated project owner to champion the playbook creation?		☐	☐
2. Operational Needs Operational Efficiency:			
• Are you struggling to consistently and efficiently deliver to existing customers?		☐	☐
• Are you and your team working excessive hours to catch up on fulfilling orders?		☐	☐
3. Strategic Goals Purpose of the Playbook:			
• Do you want to create a better work-life balance?		☐	☐
• Are you planning to sell your business or open multiple locations?		☐	☐
• Do you want to pass on responsibilities to free up time for new ventures?		☐	☐
4. Team Readiness Team Support:			
• Is your team ready and willing to support the creation of a playbook?		☐	☐
• Do you have a good relationship with your team to ensure their buy-in?		☐	☐
5. Documentation and Training Existing Documentation:			
• Has your company already documented some processes, workflows, or best practices?		☐	☐
• Do you face challenges in ensuring these documents and training reach the people who need them?		☐	☐
New Hire Onboarding:			
• Are you facing challenges in creating a structured onboarding process for new hires?		☐	☐

• Do you find it difficult to ensure new hires get up to speed quickly using existing documentation?	☐	☐

6. Time Allocation
Time Commitment:

• Can you and your team allocate and commit to at least three months to make significant progress on the playbook?	☐	☐
• Are you prepared to extend this time if you need extensive documentation?	☐	☐

7. Tools and Formats
Documentation Tools:

• Do you have or would you benefit from a tool to create an online interactive playbook?	☐	☐
• Are you open to using various methods, such as video, to capture processes and procedures?	☐	☐

8. Continuous Improvement
Updating and Testing:

• Are you prepared to regularly update the playbook as your business evolves?	☐	☐
• Do you want a system to track and test the learning of new hires?	☐	☐

9. Communication and Culture
Cultural Integration:

• Are you ready to include the role of playbook integrator/manager in a team member's responsibilities?	☐	☐
• Are you committed to embedding the playbook into your company culture and positioning it as a single source of truth for all company information and processes?	☐	☐

Scoring

Total **"Yes"** responses: ☐

Results

- **18-22 "Yes" responses:** Your business is ready for a playbook. You have the necessary foundations to create and implement a playbook effectively.
- **12-17 "Yes" responses:** Your business is almost ready for a playbook. Before proceeding, identify some areas that need improvement and develop a plan to address them.
- **0-11 "Yes" responses:** Your business is not ready for a playbook. Many areas need attention before you can successfully create and implement a playbook. Focus on those areas first before moving forward.

Why Now is the Time to Implement Your Business Playbook

If you've completed the Playbook Readiness Scorecard and determined that your business is ready to create a playbook, there's no better time to start. Here's why:

Streamline Operations and Enhance Efficiency
As your business grows, it becomes increasingly challenging to maintain consistency across roles and departments. A playbook ensures everyone follows the same proven processes, leading to higher efficiency and better results.

Prepare for Future Growth
By documenting your best practices now, you'll have a solid foundation to support future expansion. Whether you plan to open new locations, hire more staff, or take on more clients, a playbook will make the transition smoother.

Reduce Reliance on Key Individuals
When critical knowledge is stored in the heads of a few key employees, it puts your business at risk. A playbook distributes that knowledge across the team, making your company less vulnerable to turnover or absence.

Improve the Employee Experience
A well-designed playbook enhances onboarding, training, and ongoing support for your team. It clarifies roles, responsibilities, and expectations, increasing job satisfaction and retention.

Increase the Value of Your Business
A playbook is valuable if you ever decide to sell your company. It demonstrates the stability and scalability of your operations, making your business more attractive to potential buyers.

Take Action Today

Don't wait until your business faces a crisis to start documenting your processes. The time to create your playbook is now. Proactively streamlining your operations will position your company for long-term success and growth.

To get started, contact us to learn how we can help you create a customized playbook that meets your unique needs and goals.

Schedule a consultation and take the first step towards a more efficient, scalable, and valuable company.