



**DSID** 

**OPEX  
DASHBOARD**

**The Operational Excellence Workbook**

**Sarad Davenport**  
Including Exercises by Bria Williams



# OPEX DASHBOARD

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**The Operational Excellence Workbook**

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**BY SARAD DAVENPORT**  
Exercises by Bria Williams

## **OPEX Dashboard: The Operational Excellence Workbook**

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# INTRODUCTION

DSID is proud to present the OPEX dashboard, an internal assessment tool that business owners and managers can use to measure their organization's performance across several key performance indicators. This dashboard and accompanying material was created out of necessity to get a handle on our own operations and we were looking for a systematic method to make sure we were always on the right track. At its core, the OPEX dashboard is designed to help businesses operate more efficiently and effectively, with a focus on continuous improvement and operational excellence.

Using the OPEX dashboard is incredibly straightforward. Business owners simply input their responses to the assessment questions, and the dashboard does the rest, automatically generating a comprehensive analysis of the company's operational performance. The dashboard is designed to measure performance across several critical areas, including compliance, grounds and property management, intellectual property, financial operations, human resources, technology, business strategy, and service delivery. One of the most significant benefits of the OPEX dashboard is the quantitative analysis it provides business owners and managers. By measuring performance across key performance indicators, the dashboard delivers actionable insights into where a business is excelling and where there is room for improvement.

The dashboard can help businesses stay on top of their operations, making informed decisions based on data and insights rather than instincts or anecdotal evidence. At the core of the OPEX dashboard is a focus

on continuous improvement. The dashboard provides business owners with the tools they need to consistently and continuously monitor their operational performance, identify areas for improvement, and develop and implement corrective plans. With these tools at their disposal, business owners can stay ahead of the curve, operating proactively rather than reactively. Importantly, the OPEX dashboard does not exist in a vacuum. Instead, it is designed to work alongside other critical tools and resources that businesses need to operate successfully, including budgets, business plans, and operational manuals.

This workbook provides users with an in-depth guide to interpreting and remedying the dashboard's findings. The workbook is designed to help business owners and managers understand which corrective plans to implement and how to create them in a way that is tailored to their organization's needs.

In summary, OPEX is a powerful internal assessment tool that business owners and managers can use to continuously monitor and improve their operations. With its focus on operational excellence and continuous improvement, the dashboard provides businesses with the insights and tools they need to stay ahead of the curve and succeed in today's fast-paced business environment. With the accompanying workbook, business owners and managers can take an even deeper dive into their operational performance and take actionable steps to improve it.

# BUSINESS

**R**unning a business requires a lot of planning and strategic decision-making, but it is important to remember that while success is the end goal, it is critical to be compliant with relevant laws and regulations. Business compliance is an essential aspect of any professional entity, and it involves several crucial elements that help ensure that your company is operating legally and ethically.

Without compliance, organizations face the risk of fines, legal action, reputational damage, and even closure. In order to work effectively and confidently, businesses must evaluate their compliance status to ensure they are in good standing before regulatory bodies. One of the most important facets of business compliance is to have a legal professional on staff or contracted with the company. Hiring an expert who can guide your company through all legal requirements and regulations helps minimize business risks, such as lawsuits, legal penalties, and reputational harm. A qualified lawyer can help you identify and abide by legal requirements, drafting and reviewing contracts, ensuring correct data handling and privacy policies, and providing representation in case of lawsuits or other legal issues. In addition to legal support, registering your company as an entity with the state is another important component of business compliance.

When you register your organization, you provide information about your organization's legal structure and ownership. It establishes your organization as a legal entity, which gives your organization the capacity to enter into contracts, or own assets like property. The state usually requires businesses to file paperwork with the Secretary of State's office and maintain updated records. The registration of the company locally in any cities or counties where it conducts business is another essential aspect of compliance since each locality has its own regulations, such as zoning laws and business licensing requirements. If your company is a federal contractor, it is crucial to ensure that it is registered as such and in good standing with the federal government.

# COMPLIANCE

This registration usually requires obtaining a DUNS number or registering with the System for Award Management, along with adherence to various laws and regulations related to government contracting. To ensure that you meet regulatory standards and requirements and that proper guidelines are followed, hiring experts in government compliance and administration can benefit from potential clients requesting or inquiring about certification status.

A Registered Employee Identification Number (EIN) with the Internal Revenue Service (IRS) is another critical component of business compliance. It is fundamental for tax identification, reporting, and other related documentation. An EIN is a unique number used to identify your organization, and it is necessary for filing tax returns, hiring, and opening bank accounts.

Additionally, when your company is a SWaM small business, it is important to ensure that your Supplier Diversity Certification is up-to-date. This certification demonstrates that your company is minority-owned or women-owned, or otherwise disadvantaged, which can help you qualify for certain government contracts that support or reward diversity in businesses.

Cyber risks can be significant in the digital world, which makes it essential to protect the company's data and systems from cyber-attacks. The coverage of worker's compensation is crucial to safeguard employees in case of work-

related injuries, while protection for executives is important for providing financial and legal coverage when running a company exposes them to potential risks and liabilities.

In summary, compliance is essential for any business that wants to operate legally and ethically. It helps organizations comply with legal requirements, protect businesses from legal penalties and other risks, and earn the trust of their clients, employees, and partners. By maintaining the various elements outlined above, the business can help ensure that the company is and will always be in compliance with the laws and regulations that apply to the business's industries. Ultimately, maintaining good standing in regulatory compliance will lower the risk of various challenges that businesses can face. It is advisable to always stay up-to-date with current compliance regulation and hiring experts in administration and management of business compliance to sustain a culture of integrity, accountability, and social responsibility.

# Business Compliance Self-Assessment

Use the prompts below to complete the self-assessment on Business Compliance. For every yes response (Y), add 5 points. For every no response (N), add 0 points. At the end of the assessment, add each row and use your cumulative score to determine where your organization falls in this domain. If not applicable (N/A), write five (5) points.

Statement	Yes (Y)	No (N)	N/A	Notes/Evidence
Company has a legal professional on-staff or contracted				
Company is a registered Entity with the State and is good standing				
Company is a registered Entity Locally and is in good standing				
Company is a registered Federal Contractor and is in good standing				
Company has a registered Employee Identification Number (EIN) with the IRS				
Company SWaM Small Business & Supplier Diversity Certification is up to date				
Company has completed BCorp Recertification and is in good standing				
Company has completed BCorp Recertification and is in good standing				

**Cumulative Business Compliance Score:    /35 points**

## Understanding your scores:

Use your cumulative numerical score from the section above to determine your organization's present standing in the Business Compliance domain.

**Aspiring: 0-15 points**

**Approaching: 16-31 points**

**Achieved: 32-40 points**



**EXAMPLE: Business Compliance: Planning to Register Your Business**

Use the boxes below to map out a plan to register your business entity on each level.

**Local Registration(s)**

<b>Timeline</b>	<b>Required Documents</b>	<b>Affiliated Costs</b>	<b>Involved Parties</b>	<b>Results</b>
				Registration #:  Effective dates:

**State Registration(s)**

<b>Timeline</b>	<b>Required Documents</b>	<b>Affiliated Costs</b>	<b>Involved Parties</b>	<b>Results</b>
				Registration #:  Effective dates:

**Federal Registration(s)**

<b>Timeline</b>	<b>Required Documents</b>	<b>Affiliated Costs</b>	<b>Involved Parties</b>	<b>Results</b>
				Registration #:  Effective dates:

# Exercise

In this section, write down your OPEX score for this domain. After doing that, write down your Glows and Grows and a 90-Day Plan to prioritize the things you need to do in this area to improve your business operations.

**OPEX Score**

## Glows

What are the things that are going well in this area of your business?  
What are you proud of?

## Grows

What are the things that you need to work on in this area of your business? Prioritize them in order of importance.

## 90-Day Corrective Plan

What is your 90-Day Plan for addressing the areas you need to grow and do better in?  
What will you tackle first?

# PROPERTY MANAGEMENT

**P**roper property management is an essential component of many businesses. Whether you own or lease your commercial space, it is vital to ensure that the property is maintained and managed correctly. There are several crucial elements to consider when it comes to commercial property management, including having an up-to-date leasing agreement, appropriate rental insurance, proper upkeep of the external grounds, inventorying and asset tagging owned property, and maintaining company vehicles if applicable. In this section, we explore the importance of proper commercial property management and the potential risks of neglecting these key factors.

The first and most important aspect of proper property management for a business is ensuring that you have an up-to-date and signed leasing agreement. This agreement outlines the terms of the lease, including the monthly rent, who is responsible for certain repairs and maintenance, and the length of the lease term. If there are any changes to the lease agreement, they should be communicated clearly and in writing to all parties involved. Failure to have a lease agreement in place can result in disputes and confusion down the line, which can cause significant disruptions to the business.

Another crucial element of proper property management for a business is having appropriate rental insurance in place for commercial property. This insurance is essential in protecting the business owner from financial loss in the event of property damage, theft or other unexpected incidents. Depending on the location and type of business, there may be specific insurance requirements mandated by state and local regulations, which must be adhered to. Failing to maintain the proper insurance can result in legal and financial consequences that can be detrimental to the business. In addition to having proper insurance in place, it is also important to have an up-to-date contract for commercial cleaning of the property.

Commercial properties can experience heavy foot traffic, leading to increased wear and tear on the facilities. Maintaining a clean and well-kept property can help ensure that employees and visitors are safe and healthy while onsite. Additionally, having a clean property can help increase productivity and morale among employees. A professional cleaning contract ensures that you receive high-quality work that is performed on a regular schedule to minimize the risk of cleanliness-related issues in the future. Along with a cleaning contract, businesses should also have an up-to-date contract for landscaping and upkeep of the external grounds. The external appearance of a business can have a significant impact on potential clients or customers.

A well-maintained property can project an image of professionalism and credibility, while a neglected property could lead to a negative reputation. Proper upkeep of the external grounds can also prevent safety hazards such as uneven pavement or other issues that could result in slips or falls. If a business owner does not have a contract in place, it can be challenging to ensure that the external grounds are being taken care of adequately.

It is also crucial to have proper inventorying and asset tagging of all owned property, including any furniture, equipment, or other assets. Proper inventorying ensures that the business owner knows what assets they possess, the state of the assets, and their value. An asset tagging system can make it easier to identify and locate items quickly and accurately, which can be beneficial during audits or asset management purposes. Failing to manage and inventory owned property appropriately can result in financial loss, employee injury, or theft, leading to potential legal or regulatory issues.

If the business has company vehicles, proper maintenance is necessary to ensure the safety of employees and compliance with state and local regulations. Having a regular maintenance schedule for vehicles can help identify and address any issues with the vehicles promptly. Properly maintained vehicles can improve fuel efficiency, reduce the risk of breakdowns, and extend the lifespan of the vehicle. Additionally, it is critical to ensure that vehicles are properly insured and in compliance with state and local regulations. Failure to maintain compliance can lead to significant financial and legal consequences for the business owner.

In conclusion, proper property management is an essential component of any business. Neglecting key factors such as an up-to-date leasing agreement, appropriate rental insurance, proper upkeep of the external grounds, inventorying and asset tagging owned property, and maintaining company vehicles, can have severe consequences. While it can be easy to overlook these critical elements in the day-to-day operations of a business, taking the time to address and maintain them can help ensure that your business runs smoothly and that you avoid legal, financial, or reputational damage.



# Property Management Self-Assessment

Use the prompts below to complete the self-assessment on Property Management. For every yes response (Y), add 5 points. For every no response (N), add 0 points. At the end of the assessment, add each row and use your cumulative score to determine where your organization falls in this domain. If not applicable (N/A), write five (5) points.

Statement	Yes (Y)	No (N)	N/A	Notes/Evidence
Company has an up to date and signed leasing agreement				
Company has appropriate rental insurance for commercial property				
Company has an up to date contract for commercial cleaning of the property				
Company has an up to date contract for landscaping and upkeep of the external grounds				
Company has properly inventoried and asset tagged all owned property to include value				
Company vehicles have a regular maintenance schedule (if applicable)				
Company vehicles are properly insured and compliant with state and local regulations				

**Cumulative Property Management Score:    /35 points**

## Understanding your scores:

Use your cumulative numerical score from the section above to determine your organization's present standing in the Property Management domain.

**Aspiring: 0-14 points**

**Approaching: 15-27 points**

**Achieved: 28-35 points**

**Property Management: Physical Property Inventory Template**

Inventory last taken on: \_\_\_\_\_

Completed by: \_\_\_\_\_

***Technology***

Item	Description	Condition	Quantity	Estimated Value

***Office Supplies***

Item	Description	Condition	Quantity	Estimated Value

**Product Inventory**

Item	Description	Condition	Quantity	Estimated Value

**Other**

Item	Description	Condition	Quantity	Estimated Value



# Exercise

In this section, write down your OPEX score for this domain. After doing that, write down your Glows and Grows and a 90-Day Plan to prioritize the things you need to do in this area to improve your business operations.

**OPEX Score**

## Glows

What are the things that are going well in this area of your business?  
What are you proud of?

## Grows

What are the things that you need to work on in this area of your business? Prioritize them in order of importance.

## 90-Day Corrective Plan

What is your 90-Day Plan for addressing the areas you need to grow and do better in?  
What will you tackle first?



# INTELLECTUAL PROPERTY

In today's world, where ideas reign supreme, intellectual property has never been more important. Intellectual property refers to the intangible creations of the human mind, such as inventions, designs, logos, slogans, and even trade secrets. For businesses, protecting their intellectual property is crucial to safeguarding their unique ideas and products from being stolen or copied by competitors. In this chapter, we will discuss the importance of protecting your intellectual property and the key strategies that businesses can use to do so.

One of the most crucial elements of protecting your intellectual property is securing a registered copyright for your company logo with the United States Copyright Office (USCO). This copyright gives your business the legal right to prevent others from using or copying your logo without your permission. By securing a registered copyright for your logo, you can help protect your brand identity and ensure that your company's image remains unique and recognizable.

In addition to securing a registered copyright for your logo, it is also important to properly trademark your company's slogan and key phrasing with the United States Trademark and Patent Office (USTPO). A trademark provides legal protection for your company's slogan, tagline, or other key phrasing, ensuring that they cannot be used by others without your consent. A proper trademark can help prevent confusion in the market and promote brand recognition, which is essential for the success of any business.

Another critical component of protecting your intellectual property is patenting your company's proprietary technology or innovation with the USTPO. A patent provides legal protection for inventions, machines, and processes, ensuring that others cannot use or sell them without your consent. By obtaining a patent for your company's unique technology or innovation, you can maintain your competitive advantage in the market and keep your intellectual property secure. In addition to securing legal protection for your intellectual property, it is also critical to ensure that it is properly secured and authenticated. This means that you should ensure that your company's proprietary information and technology are only accessible to authorized personnel and that any unauthorized access is prevented.

Additionally, you should require authentication before allowing anyone to access your company's intellectual property, which can be done through password protection or other security measures. To ensure that your intellectual property is fully protected, it is also essential to seek the advice of legal counsel. Consult with a qualified attorney to ensure that you are taking all of the necessary steps to protect your intellectual property and that you are complying with applicable legal requirements. An experienced attorney can also help you develop a comprehensive intellectual property protection strategy that is tailored to your specific business needs.

Finally, it is important to create a standard operating procedure (SOP) that outlines the steps to take if your intellectual property has been compromised. Your SOP should define the process for reporting and investigating any suspected intellectual property theft, including who is responsible for handling the matter and what actions should be taken to mitigate and prevent further damage. In conclusion, protecting your intellectual property is crucial to safeguarding your unique ideas and products from being stolen or copied by competitors. By securing a registered copyright for your logo, trademarking your company's slogan and key phrasing, patenting your company's proprietary technology or innovation, and properly securing and authenticating your intellectual property, you can ensure that your business remains competitive in the market. Additionally, seeking the advice of legal counsel and creating a standard operating procedure for handling intellectual property theft can further strengthen your company's intellectual property protection strategy.

# INTELLECTUAL PROPERTY

# Intellectual Property Self-Assessment

Use the prompts below to complete the self-assessment on Intellectual Property. For every yes response (Y), add 5 points. For every no response (N), add 0 points. At the end of the assessment, add each row and use your cumulative score to determine where your organization falls in this domain. If not applicable (N/A), write five (5) points.

Statement	Yes (Y)	No (N)	N/A	Notes/Evidence
Company logo has a registered copyright with the USCO				
Company slogan and key phrasing is properly trademarked with USTPO				
Company proprietary technology or innovation is patented with the USPTO				
Proprietary information and technology is properly secured requiring authentication				
Official legal counsel recommendations have been sought and used to protect IP				
An SOP has been created to map a process for action when IP has been compromised				

**Cumulative Intellectual Property Score:    /30 points**

## Understanding your scores:

Use your cumulative numerical score from the section above to determine your organization's present standing in the Intellectual Property domain.

**Aspiring: 0-11 points**  
**Approaching: 12-23 points**  
**Achieved: 24-30 points**

**Intellectual Property: Planning a Strategy for Your Intellectual Property (EXAMPLE)**

Use the flowchart below to begin developing short and long term plans for your business' Intellectual Property.

	Short Term Vision ( / / - / / )	Mid-Term Vision ( / / - / / )	Long Term Vision ( / / - / / )
<p><b>Technologies, Products, &amp; Services</b> (Which technologies and products are relevant? How will they change over time? What is their relationship with each other and your business model?)</p>			
<p><b>IP Ecosystem Stakeholders</b> (Who plays a role in your organization's IP ecosystem? What does it look like? How does it intersect? Will it change over time?)</p>			
<p><b>IP Purpose</b> (What is the purpose of the unique IP that exists in your organization? To speed production? Efficiency?)</p>			
<p><b>IP Assets</b> (Which IP Assets [trademarking, copyrights, patents, design rights, etc.] are vital in supporting your IP purposes?)</p>			
<p><b>Summarizing Narrative and Strategy</b> (How can you translate the above components into a cohesive IP strategy in your sector?)</p>			

# Exercise

In this section, write down your OPEX score for this domain. After doing that, write down your Glows and Grows and a 90-Day Plan to prioritize the things you need to do in this area to improve your business operations.

**OPEX Score**

## Glows

What are the things that are going well in this area of your business?  
What are you proud of?

## Grows

What are the things that you need to work on in this area of your business? Prioritize them in order of importance.

## 90-Day Corrective Plan

What is your 90-Day Plan for addressing the areas you need to grow and do better in?  
What will you tackle first?

# FINANCIAL OPERATIONS

**P**roper financial operations are essential for the success and longevity of any business. Without proper financial management, a company can quickly find itself in dire straits - unable to make payroll, pay bills, or remain profitable. In this chapter, we will explore the critical elements of proper financial operations and why it is important for any business to incorporate them into their practices.

One of the most important aspects of proper financial operations is having a finance professional on-staff or contracted. This individual is responsible for overseeing the financial health of the company and ensuring that it is operating within its means. They are responsible for developing and managing the annual budget, creating revenue projections, and monitoring financial performance. Without a finance professional, a company may struggle to accurately track and manage financial goals, leading to potentially disastrous outcomes.

In addition to having a finance professional, a company should also have a current annual budget in place. The budget serves as a roadmap for the company's financial future and is essential for making informed decisions about expenditures, savings, and investment opportunities. The budget should be reviewed and updated regularly and should align with the company's strategic goals and objectives. Creating the annual budget should follow a structured process. Having an SOP and

process map for yearly budget planning and adoption ensures key stakeholders understand the process and are informed during the review/revision process. By documenting the process, it will eliminate inefficiencies, redundancies, or potential conflicts with individual objectives.

Proper management of company credit cards is an essential element of financial operations. A credit card issuance and use policy outlines the procedures for obtaining and using company credit cards, ensuring that employees understand the expectations. The policy should also detail how to report lost or stolen credit cards and provide guidance on disallowed expenses. By having such a policy, it reduces financial risks and overages by providing guidelines and structure.

It is equally essential for a company to have reputable business financial software for invoicing and monitoring financials. By having an efficient invoicing system, it helps streamline accounts receivables and the company can better track revenue, helping foster growth. Monitoring financials on a regular basis ensures expenses and revenue are in balance, providing insight for corrective action, or to take advantage of opportunities. The financial software helps eliminate manual processes that can be time-consuming and subject to more error-prone sorting. Another crucial component of financial operations is ensuring that the company is paying local, state, and federal taxes on time.

It is important to have an SOP in place for paying taxes, and this SOP should detail the steps necessary to remain compliant with all tax laws and regulations. By ensuring taxes are paid on time, the company can avoid costly penalties and fines, allowing it to continue focusing on growth and development rather than resolving tax debt. Regular payroll operations are fundamental to successful financial operations.

A company should have payroll software or a partner to ensure regular on-time payments for staff/contractors. Payroll is an essential element of financial management, as it ensures employees are paid correctly and on time. By investing in reliable payroll software or outsource partners, a company can eliminate time-consuming manual processes that might lead to intercompany debt, incorrect accounting and lower staff morale. Having one or more business accounts with appropriate personnel on the signature card is also essential.

With proper personnel added to the signature card, it ensures that the designated signatories know the obligations of their responsibilities to minimize potential conflicts. This approach helps in smooth business operation and meeting financial commitments. Finally, a company should have 3-5 year revenue projections benchmarked against the industry. These projections serve as a guide for what the business should aim to achieve over the next three to five years. This helps the company plan its growth strategy accordingly and prepares to overcome any potential obstacles by moving forward with a plan rather than giving into uncertainties.

In conclusion, proper financial operations are essential for any business that wants to grow and sustain in the long term. By following the outlined practices from having a finance professional, annual budget, standardized SOP, credit card policies, and reliable financial software, a company can develop and maintain a solid financial foundation. With the right approach to financial health, a business can navigate complexity, take advantage of opportunities, and build strong relationships with clients and vendors alike.



# Finance Self-Assessment

Use the prompts below to complete the self-assessment on Finance. For every yes response (Y), add 5 points. For every no response (N), add 0 points. At the end of the assessment, add each row and use your cumulative score to determine where your organization falls in this domain. If not applicable (N/A), write five (5) points.

Statement	Yes (Y)	No (N)	N/A	Notes/Evidence
Company has a finance professional on-staff or contracted				
Company has a current annual budget				
Company has an SOP and a process map for yearly budget planning and adoption				
Company has a credit card issuance and use policy				
Company has a reputable business finance software for invoicing and monitoring financials				
Company has an SOP for paying local, state, and federal taxes on time everytime				
Company has payroll software or partner to ensure regular on-time payments for staff/contractors				
Company has at least one business account with appropriate personnel on signature card				
Company has 3-5 year revenue projections benchmarked against the industry				

**Cumulative Finance Score:    /45 points**

**Understanding your scores:**

Use your cumulative numerical score from the section above to determine your organization’s present standing in the Finance domain.

**Aspiring: 0-17 points**

**Approaching: 18-35 points**

**Achieved: 36-45 points**



**Finances: A high-level annual budget template**

Use the tables below to begin mapping an annual budget for your organization. Expand this exercise by making more detailed rows and monthly or quarterly projections.

Annual budget summary	Projected	Actual	Difference
Total Income			
Total Expenses			
<b>Net:</b>			

Income	Projected	Actual	Difference
Grants			
Loans			
Revenue			
Other			
<b>Total income for FY2_ :</b>			

Staffing Expenses	Projected	Actual	Difference
<b>Total Staffing Expenses:</b>			

Office Expenses	Projected	Actual	Difference
<b>Total Office Expenses:</b>			

Operational Expenses	Projected	Actual	Difference
<b>Total Operational Expenses:</b>			

Marketing Expenses	Projected	Actual	Difference
<b>Total Marketing Expenses:</b>			

Production Expenses	Projected	Actual	Difference
<b>Total Production Expenses:</b>			

# Exercise

In this section, write down your OPEX score for this domain. After doing that, write down your Glows and Grows and a 90-Day Plan to prioritize the things you need to do in this area to improve your business operations.

**OPEX Score**

## Glows

What are the things that are going well in this area of your business?  
What are you proud of?

## Grows

What are the things that you need to work on in this area of your business? Prioritize them in order of importance.

## 90-Day Corrective Plan

What is your 90-Day Plan for addressing the areas you need to grow and do better in?  
What will you tackle first?



**A**s companies grow and develop, they often realize the importance of human resources management. Human resources operations are an essential aspect of running a successful business, and they involve several crucial elements that help ensure that your company has a happy, productive, and engaged workforce.

These elements include having HR professionals on staff or contracted, measuring and improving employee engagement and organizational culture, maintaining up-to-date employee and contractor manuals, implementing performance management processes and systems, creating up-to-date job descriptions and organizational charts, and having standard operating procedures for hiring and onboarding new employees and terminating employees/contractors. One of the essential elements of human resources management is measuring and improving employee engagement and organizational culture.

An engaged workforce is one that feels valued, respected, and connected to the company's mission and values. Measuring employee engagement can be done through surveys, focus groups, or other methods to provide insight into what motivates employees and what areas of the company need improvement. Improving organizational culture involves creating a positive and inclusive work environment where employees feel empowered to contribute their ideas and talents. These efforts can include goal-setting, recognition programs, and employee feedback processes.

Having an HR professional on staff or contracted is a critical to human resources management. Although some companies will have to grow to the point where they can hire someone in this capacity, these professionals can provide guidance on workplace policies and procedures, employee relations, and labor and employment laws. They can also provide insight into benefits packages and compensation structures that will attract and retain top talent. HR professionals can help ensure that the company is legally compliant with relevant employment laws and regulations, such as the Fair Labor Standards Act (FLSA), the Equal Employment Opportunity Commission (EEOC), and the Family and Medical Leave Act (FMLA).

Maintaining up-to-date employee and contractor manuals is crucial to ensuring that everyone understands the policies and procedures of the company. These manuals should include information on the company's mission and values, job responsibilities, work schedules, benefits, and other important aspects of the employee/contractor experience. Having

these manuals readily available to employees and contractors can help ensure that everyone understands what is expected of them and can help avoid misunderstandings or miscommunications.

Implementing performance management processes and systems is another important element of human resources management. These processes and systems can include performance evaluations, goal-setting, development planning, and recognition programs. They can help employees understand their roles and responsibilities within the company and provide opportunities for growth and advancement. By setting clear expectations and providing consistent feedback, companies can help ensure that their employees feel valued and supported.

Creating up-to-date job descriptions and organizational charts is essential to ensuring that everyone understands their role within the company. Job descriptions should be specific and outline the essential duties, education, and experience required for each position within the company. Organizational charts should be clear and concise, outlining the reporting structure within the company. These documents can help ensure that everyone understands their role within the company and can help facilitate communication and collaboration.

Having standard operating procedures for hiring and onboarding new employees is essential to ensuring that the company attracts and retains top talent. These processes should include a comprehensive job requisition and interview process, background checks, and reference checks. Onboarding

processes should include orientation sessions, training programs, and clearly defined expectations for the first 90 days of employment. By providing a positive and supportive onboarding experience, companies can help ensure that their new employees feel valued and supported from day one.

Finally, having standard operating procedures for terminating and releasing employees/contractors is essential to ensuring that the company is legally compliant and that everyone involved understands what to expect. These procedures should be clear and concise, outlining the steps that will be taken to terminate an individual's employment or contract. They should also include information about the employee's final paycheck, any benefits they may be eligible for, and any other obligations the company may have.

In conclusion, proper human resources operations are essential to ensuring that companies have a happy, productive, and engaged workforce. These operations involve several crucial elements, including measuring and improving employee engagement and organizational culture, having HR professionals on staff or contracted, maintaining up-to-date employee and contractor manuals, implementing performance management processes and systems, creating up-to-date job descriptions and organizational charts, and having standard operating procedures for hiring and onboarding new employees and terminating employees/contractors. By paying attention to these critical elements, companies can attract and retain top talent, operate legally and ethically, and create a positive and inclusive work environment.

# RESOURCES



# Human Resources Self-Assessment

Use the prompts below to complete the self-assessment on Human Resources. For every yes response (Y), add 5 points. For every no response (N), add 0 points. At the end of the assessment, add each row and use your cumulative score to determine where your organization falls in this domain. If not applicable (N/A), write five (5) points.

Statement	Yes (Y)	No (N)	N/A	Notes/Evidence
Company has a process for measuring/improving employee engagement and organizational culture				
Company has an HR professional on-staff or contracted				
Company has an up to date employee manual				
Company has an up to date manual for contractors				
Company has a performance management process and system				
Company has an up to date job description for each employee/contractor on staff				
Company has an up to date organizational chart				
Company has an up to date SOP for hiring and onboarding new employees/contractors				
Company has an up to date SOP for terminating and releasing employees/contractors				

**Cumulative Human Resources Score:    /45 points**

### Understanding your scores:

Use your cumulative numerical score from the section above to determine your organization's present standing in the Human Resources domain.

**Aspiring: 0-17 points**

**Approaching: 18-35 points**

**Achieved: 36-45 points**

## Human Resources: Employee Manual Review and Checklist (EXAMPLE)

Use the worksheet below to plan for and assess the effectiveness of your organization's employee handbook. Check the boxes of each section complete and up-to-date, and make note of missing sections.

Last update to employee manual: \_\_\_\_\_ Link: \_\_\_\_\_

Reviewed by: \_\_\_\_\_ Approved by: \_\_\_\_\_

### Aesthetics and Branding:

Handbook contains images and graphics aligned with company brand  
Handbook is easy to follow and sections are labeled  
There are links, check-lists, and lists for employees to follow  
Your organization's values, story, and mission are included

### Company Policies:

Compensation policy and schedule is present  
Expected work hours are outlined plus overtime and break policies  
Management structure is outlined  
Technology policy is present  
Company property (ie vehicle) policy is present  
Any other organization specific policies are included

### Compliance and Benefits:

Any relevant state/federal employment laws are followed and outlined  
General overview of all benefits is included  
Insurance benefits are outlined, including enrollment period  
Pension, retirement, and matching policies are included  
Worker's compensation benefits are detailed  
Any other organization specific benefits are included in this section

### Time Off and Vacation

Sick time policy is included  
Number of vacation days and accrument is included  
Process for taking PTO is outlined  
Process for taking Leave of Absence is outlined  
Company holidays are identified  
Maternal and Paternal Leave policies included

### Employee Conduct and Transitions

Social media expectations are included (if applicable)  
Conflict of interests policy is included (if applicable)  
Policy on drug and alcohol usage is outlined  
Employee dress and uniform expectations are outlined  
Process for resignation, termination, and fireable offenses is outline

# Exercise

In this section, write down your OPEX score for this domain. After doing that, write down your Glows and Grows and a 90-Day Plan to prioritize the things you need to do in this area to improve your business operations.

**OPEX Score**

## Glows

What are the things that are going well in this area of your business?  
What are you proud of?

## Grows

What are the things that you need to work on in this area of your business? Prioritize them in order of importance.

## 90-Day Corrective Plan

What is your 90-Day Plan for addressing the areas you need to grow and do better in?  
What will you tackle first?

# TECHNOLOGY

**T**echnology has become an absolute necessity for businesses of all sizes. Integrating technology into a business can streamline operations, increase productivity, and even decrease costs in some cases. However, it is important to be aware of the risks and threats that come along with implementing new technology into an organization. It is essential to have proper technology management to ensure that all devices and software operate effectively and are secure.

Every company, regardless of its size or industry, must have essential tech management systems in place to minimize potential damages and increase operations' efficiency. One of the primary components of proper technology management within a company is to have a technology professional on staff or contracted. This professional serves as the primary point of contact for all technology-related issues and is responsible for maintaining the company's technology infrastructure. This person helps implement new software and hardware, monitor network security, and keep hardware up to date. Engaging the services of the right technology professional can go a long way in ensuring a company's success.

Another critical aspect of technology management is to have a well-documented standard operating procedure (SOP) for rotating computers to keep equipment up-to-date and in compliance with best practices. This SOP should outline how frequently computers should be replaced, when new hardware must be purchased, and how to discard old equipment safely. This process ensures the company's hardware is up-to-date and, in turn, reduces the risk of security breaches and data loss. By eliminating older models and outdated equipment, companies can increase their efficiency and reduce losses due to system crashes or data breaches.

As mentioned earlier, asset management is another important component of technology management within a company. Companies should always ensure that all computers and technology property are appropriately inventoried and asset tagged to track each device's location, use, and repairs. This system will help companies with many critical operations, including audits, financial statements, and inventory replenishment. By keeping an accurate inventory of all devices, companies can ensure that they are maximizing the return on investment for their technology equipment while also ensuring that it remains secure against theft or loss. Regular software updates are essential to maintain security within a company's technology infrastructure. Companies must have a schedule in place for regular software updates to protect against security threats and ensure their systems operate optimally. Frequent updates ensure that security breaches are minimized and that systems reviews are frequently reviewed to ensure that there are no issues, especially with mission-critical software.



Companies should also have appropriate infrastructure and procedures to secure their systems against potential cyber-attacks and malware. Protection against cyberattacks and malware is crucial in today's technology-driven world. Companies need to have proper cybersecurity policies and software measures in place to protect their assets and sensitive data. A company's systems should be protected with firewalls, and systems need to have up-to-date antimalware software in place. The architecture of the company's IT infrastructure needs to be designed to secure every device from potential breaches.

With these necessary measures in place, businesses can operate in a safe and secure environment. Backing up of critical files and information is also a vital component of technology management within a company. When hardware systems fail or when unforeseen disasters occur, proper backup systems will ensure that critical files and data are not lost. Storing backups on cloud-based systems ensures that they can be retrieved quickly and easily, regardless of the situation that caused their original status to cease.

Companies must have backup systems in place, and data recovery tests should be run regularly to ensure that they remain effective. Having a seamless process for onboarding and offloading staff on all software and platforms also ensures that a company operates efficiently. New hires must have access to all the software they need to perform their jobs, and technology professionals must ensure that there are no delays to ensure they start operating immediately. On the other hand, offloading users ensures that all hardware is collected, access to software is revoked, and any data from their system is safely transferred.

Enforcing these policies and procedures makes operations smoother and minimizes the risk of potential problems associated with user access. In conclusion, technology management is an essential component of any company's success in today's digital world. It is essential to have a technology professional on staff or contracted with a company. Every company should have properly documented standard operating procedures in place for rotating computers to keep equipment up-to-date and in compliance, asset management, regular software updates, proper infrastructure to protect against cyber-attacks and malware, the backups of critical files and information, and a seamless process for onboarding and offloading staff on all software and platforms. By having these components in place, companies can ensure that they remain secure, protect their assets, and maintain maximum efficiency in operations. Proper technology management ultimately leads to greater productivity and an increased likelihood of a company's success in the long term.



# Technology Self-Assessment

Use the prompts below to complete the self-assessment on Technology. For every yes response (Y), add 5 points. For every no response (N), add 0 points. At the end of the assessment, add each row and use your cumulative score to determine where your organization falls in this domain. If not applicable (N/A), write five (5) points.

Statement	Yes (Y)	No (N)	N/A	Notes/Evidence
Company has a technology professional on-staff or contracted				
Company has an SOP for rotating computers to keep equipment up to date and in compliance				
All computers and tech property is properly asset tagged and inventoried				
Company has a schedule for regular software updates				
Company has proper infrastructure in place to protect against cyber attacks and malware				
Company has proper procedures and infrastructure to back up critical files and information				
Company has a seamless process for onboarding and offboarding staff on all software platforms				

**Cumulative Technology Score:    /35 points**

## Understanding your scores:

Use your cumulative numerical score from the section above to determine your organization's present standing in the Technology domain.

**Aspiring: 0-14 points**

**Approaching: 15-27 points**

**Achieved: 28-35 points**

**Technology: A Business Technology Plan (EXAMPLE)**

Use the worksheet below to track your organization’s plans and usage of internal technology. The lines at the bottom should be used for notes and plans to improve/build out any missing or incomplete components.

**Our Chief Technology/Information Officer:**

Name: \_\_\_\_\_ Contact: \_\_\_\_\_ Affiliation: \_\_\_\_\_

**Technology subscriptions we currently hold:**

Service	Renewal Date	Price	Notes (relevant passwords/license #s)

**Our software emergency plan:**

This should include where important data is backed-up & procedures for any extreme disruption to org-wide systems

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Our policy on updating technology:**

This should include when software is routinely updated, when/how issued technology is upgraded or exchanged, etc.

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Notes/Plans for Improvement:**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

# Exercise

In this section, write down your OPEX score for this domain. After doing that, write down your Glows and Grows and a 90-Day Plan to prioritize the things you need to do in this area to improve your business operations.

**OPEX Score**

## Glows

What are the things that are going well in this area of your business?  
What are you proud of?

## Grows

What are the things that you need to work on in this area of your business? Prioritize them in order of importance.

## 90-Day Corrective Plan

What is your 90-Day Plan for addressing the areas you need to grow and do better in?  
What will you tackle first?

# BUSINESS

Developing and implementing an effective business strategy is essential for any company that wants to succeed and thrive in today's fast-paced, highly competitive business world. A company's strategy serves as its roadmap for achieving its long-term goals and objectives, and it is the framework upon which all other business decisions are based.

In this chapter, we will discuss five essential components of an effective business strategy: having an approved 3-5 year strategic planning document on file, having a foundational mission, vision, and values document, having a one-year operations plan with benchmarks for success, conducting quarterly SWOT analyses with senior leaders, and performing market and competitive analyses.

Having an approved 3-5 year strategic planning document on file is essential for any company that wants to achieve its long-term goals and objectives. This document should outline the company's vision and goals for the next 3-5 years and provide a roadmap for how to achieve them. An effective strategic planning document will include specific, measurable, and achievable goals, as well as a detailed action plan for achieving those goals. This document should be reviewed and updated regularly, at least annually, to ensure that it remains relevant and reflects any changes in the company's goals or the business environment.

In addition to having a strategic planning document, a company should also have a foundational mission, vision, and values document. This document outlines the company's purpose, long-term aspirations, and the guiding principles that shape its decisions and actions. Having a clear mission, vision, and set of values is essential for creating a sense of purpose and direction within the organization, and it helps to align employees and other stakeholders around a common set of goals and objectives. The mission, vision, and values document should be communicated regularly to all employees, and it should serve as the foundation for all of the company's strategic and operational decisions.

A one-year operations plan is another crucial component of an effective business strategy. This plan should outline the company's objectives and key performance indicators (KPIs) for the coming year, and it should provide a roadmap for how to achieve those objectives. A well-designed operations plan will include specific, measurable, and achievable targets, as well as a detailed action plan for achieving those targets. Additionally, the operations plan should be reviewed and updated regularly, just like the strategic planning document, to ensure that it remains relevant and aligned with the company's long-term goals and objectives.

Another essential component of an effective business strategy is conducting quarterly SWOT (strengths, weaknesses, opportunities, and threats) analyses with senior leaders. These analyses should be a collaborative effort between senior leadership and department heads, and they should include a review of the company's strengths, weaknesses, opportunities, and threats in the context of the current business environment. SWOT analyses provide a framework for identifying areas of potential improvement and for developing strategies to address them. They can also help to identify emerging trends or threats before they become significant problems for the company.

Finally, performing market and competitive analyses is another important aspect of an effective business strategy. A company's success depends on its ability to identify and capitalize on market opportunities and to stay ahead of its competitors. By conducting market and competitive analyses, a company can gain insight into the current trends and challenges in the market, as well as the strategies and tactics being employed by its competitors. This information can be used to develop more effective marketing strategies, to identify new product or service opportunities, and to develop strategies for staying ahead of the competition.

In conclusion, developing and implementing an effective business strategy is essential for any company that wants to succeed in today's fast-paced, highly competitive business world. By having an approved 3-5 year strategic planning document on file, a foundational mission, vision, and values document, a one-year operations plan with benchmarks for success, conducting quarterly SWOT analyses with senior leaders, and performing market and competitive analyses, a company can develop a roadmap for achieving its long-term goals and objectives and stay ahead of the competition. An effective business strategy should be reviewed and updated regularly to ensure that it remains relevant and aligned with the company's long-term goals and objectives.

# STRATEGY

## Business Strategy Self-Assessment

Use the prompts below to complete the self-assessment on Strategy. For every yes response (Y), add 5 points. For every no response (N), add 0 points. At the end of the assessment, add each row and use your cumulative score to determine where your organization falls in this domain. If not applicable (N/A), write five (5) points.

Statement	Yes (Y)	No (N)	N/A	Notes/Evidence
Company has an approved 3-5 year strategic planning document on file.				
Company has a mission, vision, and values foundational document on file.				
Company has a one year operations plan on file to include benchmarks for success				
Company has done or has plans to do a quarterly SWOT analysis with senior leaders				
Company has done a mark and competitive analysis				

**Cumulative Strategy Score:    /25 points**

### Understanding your scores:

Use your cumulative numerical score from the section above to determine your organization's present standing in the Strategy domain.

**Aspiring: 0-9 points**

**Approaching: 10-19 points**

**Achieved: 20-25 points**

**Strategy: Mission, Vision, and Values worksheet (EXAMPLE)**

Answer the prompts below to reflect on and solidify your organization’s primary pillars of Mission, Vision, and Values. As you respond, be sure to indicate when these were last updated and adopted.

**Our Intended Purpose:**

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**What we are NOT:**

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- 
- 
- 
- 

**Our Core Values:**

1. 

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2. 

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3. 

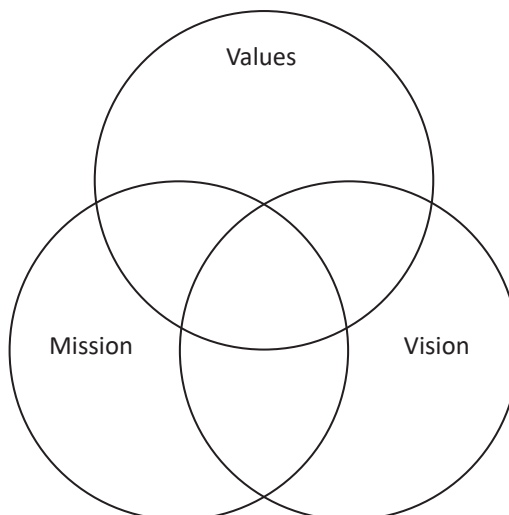
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4. 

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5. 

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6. 

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**Primary Pillar Planning:**





# Exercise

In this section, write down your OPEX score for this domain. After doing that, write down your Glows and Grows and a 90-Day Plan to prioritize the things you need to do in this area to improve your business operations.

**OPEX Score**

## Glows

What are the things that are going well in this area of your business?  
What are you proud of?

## Grows

What are the things that you need to work on in this area of your business? Prioritize them in order of importance.

## 90-Day Corrective Plan

What is your 90-Day Plan for addressing the areas you need to grow and do better in?  
What will you tackle first?

# SERVICE & DELIVERY

**S**ervice and product delivery are essential aspects of any business that offers goods or services to customers. Properly delivering these to customers ensures that businesses can create strong reputations and customer satisfaction that will help them grow and succeed over time. Here are some key areas to consider when it comes to service and product delivery for businesses.

The first key area is having a clear list of products and services with associated prices. Whether you offer just one product or a suite of services, customers want to know what they are getting and what they will pay for it. Having a clear list of what you offer and the prices associated with each is critical to avoid confusion and surprises among customers. This should be easily accessible on your website, in a brochure, or other informational materials.

Next, it is essential to ensure that your pricing structure is properly designed to account for the cost of goods sold (COGS) and prevent losses. While many businesses aim to have competitive pricing to attract customers, it is essential that they are also generating enough revenue to cover the cost of the goods or services that they are delivering. Failing to account for COGS can lead to significant losses that can put the business at risk. It is a good idea to regularly review pricing structures and adjust them as needed to improve profitability.

Having detailed descriptions of services and products is another essential aspect of service and product delivery. Customers need to know what they are receiving and what they can expect from the service or product that they are purchasing. Providing detailed descriptions that highlight features, benefits, and capabilities of each product

or service can help customers make informed buying decisions. These descriptions should be concise yet informative and should be easily accessible to customers. Another key element of service and product delivery is having effective quality control measures in place to ensure that what is delivered to customers is of the highest quality. Quality control can involve various steps, such as assessing the raw materials and components that go into a product, ensuring that finished products meet rigorous specifications, and conducting regular testing to ensure consistency and quality. By implementing and adhering to a rigorous quality control program, businesses can ensure that the products and services they offer meet or exceed customer expectations. Prompt and reliable shipping and delivery is also crucial to service and product delivery. Customers expect to receive their products or services on time - and businesses that can fulfill these expectations and exceed them are more likely to attract repeat business. This involves having an efficient and reliable delivery system in place, including a sufficient inventory of goods, partners with reliable shipping providers, and diligent tracking to ensure that goods are delivered on time and in excellent condition.

Effective communication with customers is also a vital element of service and product delivery. Businesses need to be able to communicate with customers in a way that is timely, efficient, and

effective. This may include providing customers with updates on delivery times, offering customer service support via chat, phone, or email, or implementing an automated tracking system that keeps customers informed of their delivery status. Offering excellent customer service can help build brand loyalty and increase customer retention over time.

Finally, businesses should also consider incorporating customer feedback and input into their service and product delivery efforts. By regularly soliciting feedback from customers, businesses can gain valuable insights into what they are doing right - and what needs improvement. This feedback could involve gathering data via surveys or simply communicating with customers through social media or other channels. By being responsive to customer feedback, businesses can improve service and product delivery efforts over time and strengthen customer loyalty and engagement.

In sum, service and product delivery is a critical aspect of any business that involves delivering goods or services to customers. By prioritizing clear pricing structures, effective quality control, excellent communication, and customer feedback, businesses can ensure that they are delivering quality service and products that exceed customer expectations, leading to increased revenue and profitability over time.



## Service and Product Delivery Self-Assessment

Use the prompts below to complete the self-assessment on Service and Product Delivery. For every yes response (Y), add 5 points. For every no response (N), add 0 points. At the end of the assessment, add each row and use your cumulative score to determine where your organization falls in this domain. If not applicable (N/A), write five (5) points.

Statement	Yes (Y)	No (N)	N/A	Notes/Evidence
Company has a clear list of products and services with associated prices				
Company has properly priced services and accounted for COGS				
Company has ensured and can prove that the pricing structure prevent losses				
All services and products have detailed descriptions				

**Cumulative Service and Product Delivery Score:    /20 points**

### Understanding your scores:

Use your cumulative numerical score from the section above to determine your organization's present standing in the Strategy domain.

**Aspiring: 0-7 points**

**Approaching: 8-15 points**

**Achieved: 16-20 points**

**Product & Services: Product Ideation (EXAMPLE)**

Use the tables below to reflect on recent development and engage in ideation for a new good or service you'd like to offer.

***The last product/service released:***

Release date	Product Type	Format	Purpose	Production PPU	Selling PPU	Current projections

***The next product/service being considered:***

Release date	Product Type	Format	Purpose	Production PPU	Selling PPU	Current projections

PPU = Price Per Unit

**How does your last product/service impact your next product or service?**

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**As you prepare for the next launch, what would you change from the last cycle?**

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# Exercise

In this section, write down your OPEX score for this domain. After doing that, write down your Glows and Grows and a 90-Day Plan to prioritize the things you need to do in this area to improve your business operations.

**OPEX Score**

## Glows

What are the things that are going well in this area of your business?  
What are you proud of?


## Grows

What are the things that you need to work on in this area of your business? Prioritize them in order of importance.

## 90-Day Corrective Plan

What is your 90-Day Plan for addressing the areas you need to grow and do better in?  
What will you tackle first?

# OPERATIONAL EXCELLENCE



Congratulations on completing the OPEX dashboard workbook, an intuitive and user-friendly internal assessment tool that was designed to help your business achieve operational excellence. As you knew, the OPEX dashboard was a powerful tool to measure your organization's operational performance across several critical areas, including compliance, property management, intellectual property, financial operations, human resources, technology, business strategy, and service delivery.

By using the OPEX dashboard, hopefully, you were able to take advantage of one of the most significant benefits, which was the quantitative analysis it delivered. This analysis provided you with actionable insights that you could use to identify areas where your business was doing well and areas where there was room for improvement. This helped you to stay on top of your operations, making informed decisions based on data and insights rather than just instinct or anecdotal evidence. At the core of the OPEX dashboard was a focus on continuous improvement.

The dashboard aimed to provide you with the tools to consistently and continuously monitor your operational performance, identify areas for improvement, and develop and implement corrective plans. With these tools at your disposal, you are able to operate proactively rather than reactively, allowing you to stay ahead of the curve. We understood that the OPEX dashboard was not a standalone tool, and that's why it was designed to work alongside other critical tools and resources that businesses needed to operate successfully. These included budgets, business plans, and operational manuals. The dashboard provided a comprehensive, data-driven view of how your business was performing across several key performance indicators, making it a complement to these tools.

We are proud to have released this accompanying workbook alongside the OPEX dashboard. This workbook was created to be a comprehensive guide that provided you with an in-depth understanding of how to interpret and remediate the dashboard's findings. It helped you to understand which corrective plans to implement and how to create them. The workbook was designed to be tailored to your organization's unique needs helping you to take actionable steps that aligned with your business goals. We were thrilled that you had chosen to use the OPEX dashboard and its accompanying workbook to improve your business operations. We understood that as a business owner or manager, you were busy, and your time was valuable.

The OPEX dashboard and its accompanying workbook were designed to be intuitive, user-friendly, and accessible. This made it easy to use and access on the go, allowing you to stay on top of your operations. In conclusion, we hope that your experience using the OPEX dashboard had been invaluable in helping your business achieve operational excellence. Our team at DSID wish you continued success with your business operations as you take actionable steps to improve your business using the insights and tools provided by the OPEX dashboard and accompanying workbook.