

WORKING ASSESSMENT

How connected is your services operation?

An evidence-led workshop for identifying practical improvements across the services lifecycle.



A practical working document

Use the examples and review tools to make the next decision clearer. Start with one engagement, one owner and evidence your teams can verify.

IN THIS EDITION

- 01 Purpose and scoring standard
- 02 Demand, people, capacity and delivery
- 03 Approvals, billing, finance and decisions
- 04 Priorities, owners and review dates

SCORING

Use the same evidence standard.

Review one recent engagement with sales, HR, resource management, delivery and finance.

0**Not established**

The process or evidence cannot be demonstrated for the selected engagement.

1**Person-dependent**

The activity happens, but relies on individual knowledge or ad hoc records.

2**Defined and repeatable**

Owners and definitions are agreed, with consistent records for the example reviewed.

3**Connected and reviewed**

Evidence carries across teams, exceptions are assigned and outcomes are reviewed.

A SELF-ASSESSMENT, NOT A CERTIFICATION

Score each dimension 0-3. The total of 0-24 can track your own progress with the same scope; it is not an external benchmark.

EVIDENCE WORKSHEET

Operating dimensions 1-4

Score the evidence available today, not the capability you hope to introduce.

Demand

SCORE / 0-3

A dated requirement tied to an opportunity or project.

Evidence / gap: _____

Owner / review date: _____

Employee readiness

SCORE / 0-3

Current skills, employment and joining information.

Evidence / gap: _____

Owner / review date: _____

Capacity

SCORE / 0-3

Allocations, leave and internal commitments reconciled.

Evidence / gap: _____

Owner / review date: _____

Delivery

SCORE / 0-3

Scope, milestones and risks with accountable owners.

Evidence / gap: _____

Owner / review date: _____

Engagement: _____ Review date: _____

EVIDENCE WORKSHEET

Operating dimensions 5-8

Score the evidence available today, not the capability you hope to introduce.

Time & approvals

SCORE / 0-3

Recorded work with clear submission and approval status.

Evidence / gap: _____

Owner / review date: _____

Billing readiness

SCORE / 0-3

Commercial terms and unresolved exceptions visible.

Evidence / gap: _____

Owner / review date: _____

Financial visibility

SCORE / 0-3

Definitions distinguish revenue, cost, margin and estimates.

Evidence / gap: _____

Owner / review date: _____

Decision follow-through

SCORE / 0-3

Actions, owners and review outcomes retained.

Evidence / gap: _____

Owner / review date: _____

Engagement: _____ Review date: _____

PRIORITIZATION

Choose the next improvements.

Select a small number of actions the team can realistically finish.

Start with impact

Identify the gap that affects an imminent commitment, creates repeated rework or delays a financial decision.

Check the dependency

Ask whether another record, owner or definition must be established first. Avoid automating an undefined handoff.

Priority / evidence

Which gap will you address, and what shows its impact?

Action / owner / due date

What will change, who owns it and by when?

Review / next decision

What result will you review before extending the work?
