

## **Business Drift Checkup™**

*An Operational Stability & Growth Readiness Assessment*

Prepared by [AnchorPoint Concierge](#)

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### **Purpose**

“As businesses grow, communication, scheduling, follow-up, coordination, and workflow often become harder to manage consistently. This short review helps identify areas where operational pressure may be slowing responsiveness, creating overload, or causing things to slip through the cracks.

Business Drift occurs when growth, workload, and day-to-day demands begin to outpace the systems needed to keep a business organized, responsive, and in control.”

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### **SECTION 1 — CURRENT BUSINESS PRESSURE**

#### **Which best describes your current workload?**

- Stable
- Busy but manageable
- Growing quickly
- Constantly overloaded
- Feels chaotic

#### **Which challenges occur most often?**

##### **(Check all that apply)**

- Missed calls
- Delayed follow-up
- Scheduling confusion
- Communication breakdowns
- Workflow bottlenecks
- Overloaded owner/operator
- Customer response delays
- Estimating backlog
- Vendor coordination issues
- Difficulty staying organized

#### **Do current systems feel capable of supporting additional growth?**

- Yes
- Somewhat
- No

### **SECTION 2 — RESPONSIVENESS & FOLLOW-UP**

#### **1. How would you describe responsiveness right now?**

- Strong and consistent
- Mostly consistent
- Reactive during busy periods
- Often delayed

#### **Which issues occur most often?**

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- Missed calls
- Delayed callbacks
- Slow estimates
- Forgotten follow-up
- Unanswered emails/texts
- Scheduling delays

**Do customers ever experience communication delays?**

- Frequently
- Occasionally
- Rarely
- Never

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### **SECTION 3 — WORKFLOW & COORDINATION**

**Which operational issues occur most often?**

- Workflow pileups
- Scheduling confusion
- Internal communication gaps
- Too many manual processes
- Information bottlenecks
- Unclear responsibilities
- Operational lag
- Reactive workflows

**Does too much operational knowledge live in one person's head?**

- Yes
- Somewhat
- No

**Do projects ever slow down because communication or coordination breaks down?**

- Frequently
- Occasionally
- Rarely
- Never

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### **SECTION 4 — LOCAL ACCESS & OPERATIONAL SUPPORT**

**Which areas create the most operational strain?**

- Finding reliable labor
- Vendor coordination
- Subcontractor access
- Overflow workload
- Scheduling support
- Communication management

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- Operational organization
- Customer responsiveness

**Would stronger local coordination support help operations move faster?**

- Yes
- Possibly
- No

**Do you feel well connected to reliable local resources?**

- Yes
- Somewhat
- No

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### SECTION 5 — OWNER / LEADERSHIP STRAIN

**Which areas create the most personal pressure?**

- Constant interruptions
- Operational overload
- Communication management
- Scheduling pressure
- Follow-up responsibility
- Workflow management
- Decision fatigue
- Carrying too much mentally

**Do you spend more time reacting than leading?**

- Frequently
- Occasionally
- Rarely
- Never

**Does the business feel harder to manage than expected?**

- Yes
- Somewhat
- No

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### FINAL REFLECTION

What would improving operational stability look like over the next 6–12 months?

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What operational area would you most like to improve first?

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Would you be interested in discussing operational coordination support?

- Yes
- Possibly
- Not at this time

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**CONTACT INFORMATION**

Business Name: \_\_\_\_\_

Primary Contact: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Industry: \_\_\_\_\_

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