



Monthly Ops Review Guide

Driving Innovation, Delivering Excellence

At My OpsBox, we blaze the trail in operational support—delivering ruggedly reliable managed services that help your business navigate obstacles, gain traction, and scale with confidence.



Monthly Ops Review Guide

Want to lead your operations like a boss? Run this simple Monthly Ops Review. These five questions uncover bottlenecks, simplify workflows, and help you delegate or automate the right tasks.

Provided in this document are the questions plus examples, instructions, and prompts to help you or your team answer them clearly and honestly.

How to conduct an Ops Review Each Month

- Schedule a dedicated 30–45 minute review.
- Have each team member submit their answers beforehand.
- Discuss themes, not isolated complaints.
- Choose 1-3 improvements to implement that month.
- Track wins and fixes over time.

This simple structure keeps your ops tight, proactive, and scalable.



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#1 What broke?

Purpose: Identify failures early so they don't repeat.

Examples:

- A client onboarding email didn't send.
- Your CRM didn't capture new leads.
- A report was missing data.

How to talk about it:

- Focus on what happened, not who caused it.
- Ask: "Was this a one-off glitch or a pattern?"
- Document the fix and assign an owner.

#2 What took too long?

Purpose: Spot time-drains that should be simplified, delegated, or automated.

Examples:

- Manually building weekly reports.
- Repeating the same email responses.
- Uploading content across multiple platforms.

How to talk about it:

- Ask: "Which task felt like it ate your week?"
- Look for anything that is repetitive, admin-heavy, or low-value.
- Decide if it needs tighter SOPs, better tools, or delegation.



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#3 What was confusing?

Purpose: Clarify unclear processes before they slow you down.

Examples:

- No one knows the latest SOP for sales follow-ups.
- Team isn't sure who approves expenses.
- A workflow has too many exceptions.

How to talk about it:

- Ask team members what they struggled to understand.
- Note where people interpret steps differently.
- Decide if you need: a new SOP, a loom video, or a simpler workflow.

#4 What did we ignore?

Purpose: Catch tasks that were deprioritize, but maybe shouldn't have been.

Examples:

- Client follow-ups.
- Updating SOPs.
- Cleaning or organizing digital files.
- Quarterly planning tasks.

How to talk about it:

- Identify why it was ignored: lack of time, unclear owner, low visibility.
- Decide if it's still important. If yes, assign and set a date.



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#5 What should we automate?

Purpose: Reduce manual work and free up your team's energy.

Examples:

- Zapier automations for leads.
- Calendly reminders.
- Asana/ClickUp task creation.
- Auto-sending onboarding emails.

How to talk about it:

- Look for anything repetitive or task-driven.
- Ask: "Could a tool do this faster or more accurately than us?"
- Create a simple Automation Backlog: idea → tool → owner → priority.