



Business Efficiency Scorecard

How efficiently is your business really running?

A 20 question self-assessment across Financial Management, Operations, Microsoft 365 Automation, and AI Adoption.

Instructions: For each statement below, click the number that best reflects your organization today. Return your Scorecard to OwlPoint Advisory, then we will do the math and respond with our recommendations for next steps.

I. Financial Management

Score each statement 1–5 (1 = Strongly Disagree • 2 = Disagree • 3 = Somewhat True • 4 = Agree • 5 = Strongly Agree)

Statement	1 2 3 4 5
We maintain a rolling 13-week cash flow forecast.	○ ○ ○ ○ ○
Monthly financial reports are available within 10 business days.	○ ○ ○ ○ ○
Management receives KPI dashboards regularly.	○ ○ ○ ○ ○
Accounts receivable are reviewed weekly.	○ ○ ○ ○ ○
Budget-to-actual results are monitored monthly.	○ ○ ○ ○ ○

Subtotal: / 25

II. Operational Efficiency

Score each statement 1–5 (1 = Strongly Disagree • 2 = Disagree • 3 = Somewhat True • 4 = Agree • 5 = Strongly Agree)

Statement	1 2 3 4 5
Core business processes are documented.	○ ○ ○ ○ ○
Team responsibilities are clearly defined.	○ ○ ○ ○ ○
Workflows are standardized across departments.	○ ○ ○ ○ ○
We have clear operational KPIs.	○ ○ ○ ○ ○
Repetitive tasks are regularly reviewed for automation.	○ ○ ○ ○ ○

Subtotal: / 25

TURNING COMPLEXITY INTO STRATEGY.

III. Microsoft 365 & Automation

Score each statement 1–5 (1 = Strongly Disagree • 2 = Disagree • 3 = Somewhat True • 4 = Agree • 5 = Strongly Agree)

Statement	1 2 3 4 5
Email attachments are automatically organized.	○ ○ ○ ○ ○
Reports are generated automatically.	○ ○ ○ ○ ○
Approval processes are automated.	○ ○ ○ ○ ○
Outlook reminders and follow-ups are automated.	○ ○ ○ ○ ○
We actively use Microsoft Power Automate.	○ ○ ○ ○ ○

Subtotal: / 25

IV. AI & Productivity

Score each statement 1–5 (1 = Strongly Disagree • 2 = Disagree • 3 = Somewhat True • 4 = Agree • 5 = Strongly Agree)

Statement	1 2 3 4 5
We use Copilot or AI tools regularly.	○ ○ ○ ○ ○
Meeting notes are summarized automatically.	○ ○ ○ ○ ○
Email drafting is AI-assisted.	○ ○ ○ ○ ○
Excel analysis leverages AI tools.	○ ○ ○ ○ ○
Employees are trained to use AI effectively.	○ ○ ○ ○ ○

Subtotal: / 25

TOTAL SCORE: / 100

Score Interpretation

Score Range	Rating	Est. Efficiency Gain
0–40	Significant Opportunity	10+ hours per week
41–70	Moderate Efficiency	5–10 hours per week
71–100	Strong Operational Foundation	2–5 hours per week

Want help closing the gap?

If your score points to room for improvement, a Business Efficiency Assessment will identify your top 3–5 opportunities and provide a roadmap of quick wins you can implement within 30 days — using tools you likely already own. Contact us below for details.



Mark Masquelier, CPA
<https://owlpointadvisory.com>
 email: mark@owlpointadvisory.com

