

Summit SCALE® Coaching

BOTTLENECK AUDIT

Is your business too dependent on you?

Name		Date	
Business		Role	

Purpose of this audit

Most owner-managed businesses become dependent on the owner gradually. This audit will help you identify where your personal involvement may be restricting progress, creating risk or limiting the capability of your team.

How to score each statement

1	2	3	4	5
Strongly disagree	Mostly disagree	Sometimes true	Mostly true	Strongly agree

Answer based on how the business operates today, not how you would like it to operate.

Part 1: Owner Dependency

Statement	Score 1-5
Important work slows down when I am unavailable.	
I am involved in more day-to-day decisions than I should be.	
Team members regularly come to me for answers they could reasonably work out themselves.	
Customers or suppliers rely heavily on their personal relationship with me.	
I find it difficult to take proper time away from the business.	

Section total		/ 25
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Part 2: Delegation and Accountability

Statement	Score 1-5
I often take work back because it feels quicker or safer to do it myself.	
Responsibilities are not always clearly owned by one person.	
People are unsure which decisions they can make without my approval.	
I spend too much time checking, correcting or chasing work.	
Problems are often escalated to me without a recommended solution.	

Section total		/ 25
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Part 3: Strategic Direction

Statement	Score 1-5
The business has too many competing priorities.	
Important strategic work is regularly pushed aside by urgent issues.	
My team would struggle to clearly explain the business's top priorities.	
Decisions often come back to me because the wider direction is unclear.	
We are busy, but I am not always confident we are making meaningful progress.	

Section total		/ 25
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Part 4: Systems and Consistency

Statement	Score 1-5
Important knowledge and processes still sit mainly in my head.	
The quality of work varies depending on who completes it.	
We repeatedly solve the same types of problems.	
Key activities are not documented or consistently followed.	
The business relies too heavily on individual effort and goodwill.	

Section total		/ 25
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Part 5: Leadership and Management Capability

Statement	Score 1-5
Managers or senior team members still rely heavily on me to lead their people.	
Difficult performance or behaviour issues are not addressed quickly enough.	
Team members do not consistently take ownership for outcomes.	
I am still the main source of energy, direction and momentum in the business.	
The business does not yet have enough leadership capability beneath me.	

Section total		/ 25
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Your Bottleneck Score

Transfer each section total into the boxes below, then add them together to calculate your overall score.

Area	Your score	Maximum
Owner Dependency		25
Delegation and Accountability		25
Strategic Direction		25
Systems and Consistency		25
Leadership and Management Capability		25

OVERALL BOTTLENECK SCORE		/ 125
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What your score may indicate

25-49 | Low owner dependency

The business appears to operate with a healthy degree of independence. Focus on strengthening the highest-scoring areas and preventing dependency from increasing as the business grows.

50-74 | Emerging bottleneck

Some areas are beginning to depend too heavily on you. Growth is likely to create additional pressure unless responsibilities, systems and decision-making become clearer.

75-99 | Significant bottleneck

Your involvement is probably limiting the capacity of the business. Reduce dependency deliberately rather than simply trying to become more productive.

100-125 | Critical owner dependency

The business is highly reliant on your continued presence and intervention. A structured plan is needed to transfer responsibility, build management capability and strengthen operating systems.

Identify Your Biggest Bottleneck

Your highest-scoring section is likely to be the first area to address. Use the questions below to identify a practical starting point.

1. Which three statements received your highest scores?

2. What work, decisions or knowledge currently depend too heavily on you?

3. What is the impact of that dependency on the business, the team and you personally?

4. What are you continuing to do because you have always done it?

5. Which responsibility could someone else begin to own within the next 30 days?

6. What would need to be clearer for you to step back confidently?

Your First Action

The area I will address first is:

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The responsibility, decision or process I will begin transferring is:

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The person who should take greater ownership is:

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What success will look like:

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The support, system or clarity they will need:

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Review date:

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Final Question

If you were unavailable for four weeks, what would slow down, become confused or stop completely?

**The goal is not to remove yourself from the business.
It is to build a stronger business around you - one that relies less on your constant
intervention and benefits more from your leadership.**

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