

I G N I T E & E L E V A T E
Healthcare Operations Consulting

F I E L D G U I D E • # 0 0 1

Visibility Precedes Improvement

Can Your New Leader Find the Truth?

A 5-Minute Operational Assessment for Leadership Transitions

O B S E R V A T I O N F R O M T H E F I E L D

Organizations often replace leaders while the same challenges persist. The assumption is that the previous leader wasn't effective.

Sometimes that's true.

But just as often, new leaders inherit unclear ownership, undocumented processes, conflicting reports, tribal knowledge, competing priorities, and years of operational workarounds.

Before evaluating a leader's performance — evaluate the environment they inherited.

The Central Question:

“If a new leader started tomorrow, could they quickly determine what is really happening in the operation?”

HOW TO USE THIS ASSESSMENT

For each statement, select the response that best reflects your organization’s current state. Be honest — the value is in the conversation, not the score.

Response	Score	What It Means
Yes	2 pts	This is consistently in place
Partial	1 pt	This exists but is incomplete or inconsistent
No	0 pts	This is absent or not functioning

SECTION 1 OF 5

Ownership & Accountability

Can a new leader quickly determine who owns what?

Question	Yes (2)	Partial (1)	No (0)
Major business processes have clearly identified owners.	☐	☐	☐
Decision-making authority is documented and understood.	☐	☐	☐
Team members can explain who is accountable for key outcomes.	☐	☐	☐
There are no significant areas where ownership is unclear.	☐	☐	☐
Cross-functional responsibilities are documented and understood.	☐	☐	☐
Section 1 Score:	_____ / 10		

SECTION 2 OF 5

Process Clarity

Can a new leader understand how work actually gets done?

Question	Yes (2)	Partial (1)	No (0)
Key operational workflows are documented.	☐	☐	☐
Process documentation reflects current practices.	☐	☐	☐
New employees can learn core processes without relying on a specific person.	☐	☐	☐
Critical work is not dependent on tribal knowledge.	☐	☐	☐
Process exceptions are documented and understood.	☐	☐	☐
Section 2 Score:	_____ / 10		

SECTION 3 OF 5

Data & Reporting

Can a new leader trust the information they receive?

Question	Yes (2)	Partial (1)	No (0)
Leadership teams use a common set of metrics.	☐	☐	☐
KPI definitions are documented and accessible.	☐	☐	☐
Teams agree on how metrics are calculated.	☐	☐	☐
Reports consistently produce the same results.	☐	☐	☐
Data sources are clearly identified and understood.	☐	☐	☐
Section 3 Score:	_____ / 10		

SECTION 4 OF 5

Governance & Prioritization

Can a new leader determine how decisions are made?

Question	Yes (2)	Partial (1)	No (0)
Priorities are documented and communicated across the organization.	☐	☐	☐
There is a defined process for escalating issues.	☐	☐	☐
Decisions are documented and accessible to relevant stakeholders.	☐	☐	☐
Work intake and prioritization follow a consistent process.	☐	☐	☐
Leadership teams are aligned on major initiatives and direction.	☐	☐	☐
Section 4 Score:	_____ / 10		

SECTION 5 OF 5

Organizational Resilience

Can the operation function without specific individuals?

Question	Yes (2)	Partial (1)	No (0)
Critical knowledge is documented and not held by one person.	☐	☐	☐
Cross-training exists for key functions and roles.	☐	☐	☐
Employee turnover would not create significant operational risk.	☐	☐	☐
Key relationships are not concentrated with a single individual.	☐	☐	☐
Operational success is not dependent on a few “heroes.”	☐	☐	☐
Section 5 Score:	_____ / 10		

⚠️ RED FLAG INDICATORS

If you answer YES to any of the following, investigate further before evaluating leadership effectiveness:

- ☐ Different teams provide different answers to the same operational question.
- ☐ Leadership reports cannot be reconciled against each other.
- ☐ Critical processes rely on one or two specific individuals.
- ☐ Ownership changes depending on who is asked.
- ☐ Major decisions are not consistently documented.
- ☐ New leaders frequently discover significant issues months after joining.

TOTAL ASSESSMENT SCORE

Section 1: Ownership & Accountability	_____ / 10
Section 2: Process Clarity	_____ / 10
Section 3: Data & Reporting	_____ / 10
Section 4: Governance & Prioritization	_____ / 10
Section 5: Organizational Resilience	_____ / 10
TOTAL SCORE	_____ / 50

INTERPRETING YOUR RESULTS

40–50 Points	Strong Foundation A new leader should be able to quickly understand the operation and focus on improvement rather than uncovering basic operational information.
25–39 Points	Moderate Operational Risk Some areas may slow a leader’s ability to understand the operation and make effective decisions. Review sections with the lowest scores and identify opportunities to improve clarity, consistency, and transparency.
0–24 Points	High Operational Risk A new leader may spend significant time uncovering ownership, understanding workflows, validating reporting, and rebuilding trust before meaningful improvement can occur.

REFLECTION QUESTIONS

The score matters less than the conversation it starts. Use these questions to guide a deeper discussion:

1. What would a new leader struggle to understand during their first 30 days?
2. Which reports would they trust immediately — and which would they question?
3. What critical information exists only in someone's head?
4. Where would they receive conflicting answers to the same question?
5. What would they discover after six months that nobody told them upfront?
6. If your strongest employee left tomorrow, what knowledge would walk out the door with them?

COMMON IMPROVEMENT OPPORTUNITIES

Low scores don't just identify risk — they reveal where to start. Below are the most common improvement opportunities by section.

01 Ownership & Accountability	• Develop a process ownership register that maps each major workflow to a named accountable leader — not a team or department. • Publish a RACI or decision rights matrix and review it during leadership transitions, not just onboarding. • Conduct a 30-day “ownership audit” to surface areas where multiple people think they own something — or no one does.
02 Process Clarity	• Prioritize documentation for your top 10 highest-volume or highest-risk processes first — don't try to document everything at once. • Implement a process review cycle (annually at minimum) to keep documentation current with actual practice. • Identify your top 3 “key person dependencies” and create knowledge transfer plans before they're needed.
03 Data & Reporting	• Create a KPI glossary that defines every metric: what it measures, how it's calculated, and what source it pulls from. • Establish a single source of truth for operational reporting and retire competing dashboards or parallel spreadsheets. • Run a “report reconciliation” exercise — give two teams the same question and compare their answers. Gaps are your roadmap.
04 Governance & Prioritization	• Document your escalation path with clear thresholds: what gets escalated, to whom, and within what timeframe. • Implement a simple intake and prioritization process for new work requests to prevent reactive, ad-hoc prioritization. • Establish a leadership alignment cadence (e.g., monthly operating review) with documented decisions and follow-up owners.
05 Organizational Resilience	• Map your critical knowledge holders and build a succession or cross-training plan before turnover forces your hand. • Standardize how institutional knowledge is captured — shared drives, wikis, or documented SOPs — and enforce it consistently. • Evaluate whether key external relationships (vendors, regulators, partners) are distributed across multiple team members.

Not Sure Where to Start?
Focus on the section with your lowest score first. Even one or two targeted improvements can dramatically accelerate a new leader’s ability to navigate the operation with confidence.

YOUR 30-DAY ACTION PLAN

Use your assessment results to identify your top three priorities. Assign an owner and a target date for each.

Priority	Action	Owner	Due Date
1			
2			
3			

KEY OBSERVATIONS

Biggest Risk Identified
What represents the greatest operational exposure from this assessment?

First Improvement Opportunity
Where can we create the most visibility and impact in the next 30 days?

Additional Notes
Other observations, patterns, or follow-up items from the discussion.

ABOUT IGNITE & ELEVATE
Ignite & Elevate is a healthcare operations consulting firm serving health plans, TPAs, behavioral health organizations, healthcare technology companies, and specialty healthcare operations.
We specialize in operational assessments, workflow optimization, governance design, appeals infrastructure, and process transformation — the foundational work that helps organizations operate with clarity, accountability, and confidence.
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