

**Monthly Systems Health Check** *A monthly review to keep your systems, documentation, and workflows running the way they should.*

Set aside 20–30 minutes at the end of each month. Work through each section honestly — the value is in catching small drift before it becomes a bigger problem.

### Documentation

- Are your key documents stored where people can actually find them?
- Have any documents been updated in the last month — and if so, are they saved in the right place?
- Are there documents people are working around rather than using?
- Are any documents out of date, duplicated, or no longer relevant?

### Workflows

- Are your core processes being followed as designed?
- Has anything been done differently this month — workarounds, shortcuts, exceptions?
- Are those changes worth keeping? If so, does the documented process need updating?
- Is any part of a workflow causing frustration or delay?

### Tools

- Are all your tools still being used for their intended purpose?
- Is anything being used in a way it wasn't designed for?
- Are there tools nobody is using anymore that could be removed?
- Has anything changed in how a tool works that affects your processes?

### Action Tracking

- Are actions from meetings and projects being captured with a clear owner and due date?
- Are open actions being followed up, or are they stalling?
- Were any actions from last month left incomplete without explanation?
- Is there a backlog of actions that needs a clear-out?

### Knowledge

- Is any critical knowledge still living only in one person's head?
- Has anyone left, changed roles, or taken leave in a way that exposed a knowledge gap?
- Are new team members able to get up to speed without relying on a single person to explain things?

### Triggers

- Have any of the conditions that start a process or project changed?
- Are there new triggers that aren't yet captured in your documentation?
- Has a process been starting late or inconsistently — and is a missed trigger the reason?

**End of Month Note** *Use this space to record anything that needs attention next month, any process updates made, or anything flagged for a deeper review.*