



STRATEGIC LEADERSHIP TOOL

Operating Model Bottleneck Assessment

+ Delegation Matrix Template

A leadership tool for diagnosing workflow friction, clarifying decision rights, and building a more scalable operating model.

Use this template to:

- Identify where delivery slows down
- Surface partner and manager overload points
- Clarify who should decide, review, recommend, and execute
- Prioritize workflow changes that improve scalability and client experience

Prepared by: _____

Prepared for: _____

Service line or function: _____

Date: _____

HOW TO USE THIS TOOL

This assessment is designed for a partner group, executive team, or service-line leadership team. It works best when completed for **one core workflow at a time**, such as tax return delivery, monthly advisory work, audit engagements, onboarding, or client issue resolution.

Step 1: Choose One Workflow
Pick a workflow that is important, recurring, and currently under strain.

Step 2: Complete the Bottleneck Assessment
Map where the work slows down, who gets pulled in, and which decisions repeatedly escalate upward.

Step 3: Use the Delegation Matrix
Clarify who should own execution, recommend decisions, review work, and make final calls.

Step 4: Identify Redesign Priorities
Determine what should be standardized, delegated, restructured, or escalated differently.

Recommended Participants
Managing partner, service-line leader, operations leader, or manager-level leader.

Time Required
45 to 90 minutes per workflow.

Best Use Case
Use one copy of this template per workflow or service line.

BOTTLENECK ASSESSMENT

Section A: Define the Workflow

Workflow Name: _____ **Service Line:** _____

Current Owner: _____ **Client Type:** _____

Frequency: Daily / Weekly / Monthly / Quarterly / Seasonal / Ongoing

Why this workflow matters:

Section B: Map the Current Flow

STAGE	WHAT HAPPENS HERE?	PRIMARY RESPONSIBLE PERSON	COMMON DELAY / FRICTION
1			
2			
3			
4			
5			
6			

Section C: Bottleneck Indicators

Scale: 1 = Rarely true | 2 = Occasionally true | 3 = Sometimes true | 4 = Often true | 5 = Consistently true

INDICATOR	SCORE (1-5)	NOTES
Work regularly waits on partner input before moving forward		
Managers are expected to solve issues they do not fully control		
Review steps are unclear, duplicative, or inconsistent		
Client communication depends too heavily on one individual		
Team members are unclear on who owns the next step		
Exceptions and special cases frequently disrupt the workflow		
Turnaround time varies significantly by team or leader		
Rework is common because expectations were not clear upstream		
The workflow relies on informal follow-up vs. defined processes		
Leaders are pulled into routine decisions		
TOTAL SCORE (/50):		

Interpretation: 10-19: Low structural strain | 20-29: Emerging friction | 30-39: Material bottleneck risk | 40-50: High operating-model strain

WORKFLOW PRESSURE SCORECARD

Rate the current workflow across the dimensions below.

Scale: 1 = Low risk/strain, 5 = High risk/strain.

DIMENSION	SCORE (1-5)	WHAT TO CONSIDER
Client experience risk	<input style="width: 40px; height: 25px;" type="text"/>	Does the current workflow create delays, inconsistency, or confusion for clients?
Partner dependency	<input style="width: 40px; height: 25px;" type="text"/>	How much of the workflow depends on direct partner involvement?
Manager load pressure	<input style="width: 40px; height: 25px;" type="text"/>	How much coordination, escalation, and cleanup is falling to managers?
Quality control risk	<input style="width: 40px; height: 25px;" type="text"/>	Where could inconsistency or unclear review create errors or rework?
Scalability constraint	<input style="width: 40px; height: 25px;" type="text"/>	Could this workflow handle more volume or complexity without breaking?

Diagnosis Summary

Highest-risk dimension:

Why:

Which role feels the most strain today?

Partner / Manager / Senior / Specialist / Admin / Mixed

Where is the primary constraint?

Decision-making / Review / Capacity / Client communication Handoffs
 / Workflow visibility / Training / Role clarity

Authority Framework:

D = Decide: Final authority; accountable for the decision.

R = Recommend: Evaluates options and proposes action.

V = Review / Validate: Checks quality/risk before finalization.

E = Execute: Carries out the work.

DELEGATION MATRIX

WORKFLOW ACTIVITY / DECISION	PARTNER	MANAGER	SENIOR / SUP	SPECIALIST	OPS / ADMIN
Scope engagement or define approach					
Assign work and set timeline					
Review technical output					
Resolve routine client questions					
Resolve exceptions or unusual issues					
Approve final deliverable					
Communicate key findings/recs					
Follow up on open items					
Escalate risk or scope changes					
Close workflow & capture lessons					

Delegation Rules Check

Review your matrix above. If you answer "No" to these, the workflow is likely fragile.

- Is there exactly one final decision-maker (D) per row?
- Is the review (V) step truly necessary for every single item?
- Are partners free from "E" tasks (Execution) on routine work?
- Do managers have clear "D" authority for day-to-day issues?
- Could any recurring decision move down one level with clearer standards?

REDESIGN PRIORITIES

Based on the assessment and delegation matrix, identify the changes that would most improve flow, accountability, and scalability.

CURRENT ISSUE	ROOT CAUSE	RECOMMENDED CHANGE	PRIORITY	OWNER

Redesign Categories

- **Standardize:** When the problem is inconsistency.
- **Delegate:** When authority is too concentrated.
- **Redesign Role:** When structural overload exists.
- **Remove Review:** When checking is redundant.
- **Add Escalation Rule:** When exceptions create chaos.
- **Add Visibility:** When status is unclear.

Prompt Questions

- Where should the firm:
- Reduce partner touchpoints?
 - Clarify manager authority?
 - Standardize recurring decisions?
 - Separate client comms from technical review?
 - Redesign handoffs?

NEXT-STEP ACTION PLAN

The three most important changes to make now:

1. _____

Owner: _____ Target Date: _____

2. _____

Owner: _____ Target Date: _____

3. _____

Owner: _____ Target Date: _____

Success in 90 Days Looks Like:

- Faster movement through reviews
- Clearer decision rights by role
- Reduced partner dependency
- More sustainable manager workload
- Consistent client experience

Measures to Track

METRIC	CURRENT STATE	90-DAY GOAL
Avg turnaround time		
Partner touchpoints		
Rework loops		
Escalation volume		

Need help interpreting what this assessment reveals?

Hollinden works with firm leaders to redesign operating models, clarify decision rights, and build delivery structures that support sustainable growth.

www.hollinden.com/strategic-planning