

# The Staffing Agency OS Audit

A 16-question self-assessment across the four core functions of your agency: Supply, Demand, Delivery, and Support. Score each question 1–5 and use the guide at the end to identify where your growth is stalling.

Agency name: \_\_\_\_\_ Date completed: \_\_\_\_\_

## How to use this audit

<p><b>1</b> Score each question 1–5. Circle or write your number in the right-hand column.</p>	<p><b>2</b> Add up your section score (4–20) and your total score (16–80) at the bottom.</p>	<p><b>3</b> Use the scoring guide on the last page to identify your weakest function and where to focus first.</p>
--	--	--

**Scoring scale:** 1 = This doesn't exist or is completely manual 2 = We've started but it's inconsistent 3 = It works but we rely on one person 4 = It's documented and mostly reliable 5 = It runs without anyone thinking about it

## Function 1: Supply

*Your worker-side engine — recruiting, onboarding, credentialing, and talent pool depth*

Question	1	2	3	4	5
1 We have a consistent recruiting pipeline with at least two active worker sources — we're not just posting on one job board and waiting.	1	2	3	4	5
2 Our onboarding process is digital and completed before a worker's first shift — not a stack of PDFs sent by email the morning of.	1	2	3	4	5
3 Credential and certification expiry is tracked automatically — we don't rely on someone remembering to check a spreadsheet.	1	2	3	4	5
4 We can query our talent pool by skill, location, certification, and availability in under two minutes to fill an urgent order.	1	2	3	4	5

<b>Supply section score (4–20)</b>	_____ / 20
------------------------------------	------------

## Function 2: Demand

*Your client-side engine — client relationships, order intake, business development, and CRM*

Question	1	2	3	4	5
1 We have a CRM that every team member uses consistently — client relationships, open orders, and conversations are tracked in one place, not in someone's email inbox.	1	2	3	4	5
2 Clients can submit job orders and check their status without calling or emailing us — they have a self-service option they actually use.	1	2	3	4	5
3 We are not dependent on 2–3 clients for more than 60% of our revenue — our demand is diversified enough to absorb one client pausing.	1	2	3	4	5
4 Our account managers know each client's upcoming volume needs before the client calls to tell us — because the data is already in our system.	1	2	3	4	5

**Demand section score (4–20)**

\_\_\_\_ / 20

## Function 3: Delivery

*Your operations engine — job management, scheduling, dispatch, timesheets, and no-show response*

Question	1	2	3	4	5
1 Shifts are dispatched and confirmed by workers the night before — we are not making confirmation calls the morning of the shift.	1	2	3	4	5
2 Workers clock in and out via a mobile app with GPS verification — we are not relying on paper sign-in sheets or manual entry.	1	2	3	4	5
3 Timesheets are collected and reviewed the same day as the shift — not at the end of the week when memories and records are unreliable.	1	2	3	4	5
4 When a worker is a no-show, an automated coverage workflow starts immediately — we are not waiting for a coordinator to notice the gap and start making calls.	1	2	3	4	5

**Delivery section score (4–20)**

\_\_\_\_ / 20

## Function 4: Support

Your back-office engine — payroll, invoicing, HR compliance, and operational reporting

Question	1	2	3	4	5
1 Payroll closes on time every cycle without manual reconciliation — timesheet data feeds into payroll cleanly and errors are the exception, not the norm.	1	2	3	4	5
2 Client invoices go out within 24 hours of a completed shift — we are not waiting 3–5 days for timesheet data to be compiled before billing.	1	2	3	4	5
3 HR compliance documentation — I-9s, W-4s, signed policies, certifications — is stored digitally and can be retrieved in under 5 minutes if audited.	1	2	3	4	5
4 We can produce a report showing our fill rate, no-show rate, and gross margin by client without building a spreadsheet — it's available on demand.	1	2	3	4	5

Support section score (4–20)

\_\_\_\_ / 20

**Total score (add all four section scores):** \_\_\_\_ / 80

Use the scoring guide below to interpret your results.

## Scoring guide

Total score (all 16 questions)

Score	Rating	What it means
64–80	Strong OS	All four functions are largely systematized. Focus on the lowest-scoring section to remove the last growth bottlenecks.
48–63	Functional	You have solid foundations in most areas but at least one function is creating drag. Fix the lowest section before adding volume.
32–47	At risk	Two or more functions are running on manual effort. Growth will continue to stall or require hiring more people to sustain current volume.
16–31	Fire drill mode	Your operation is held together by individuals, not systems. The priority is to stabilize one function before trying to scale anything.

Section score (each function, out of 20)

Score	Status	Recommended action
-------	--------	--------------------

<b>17–20</b>	<b>Engine is firing</b>	This function is a strength. Maintain it and use it as a model for how to improve the others.
<b>13–16</b>	<b>Running but leaky</b>	Core systems are in place but gaps exist. Document what's working and fill in the manual handoffs.
<b>9–12</b>	<b>Inconsistent</b>	Relies on specific people rather than repeatable processes. Start by documenting the process you use most, then systematize it.
<b>4–8</b>	<b>Critical gap</b>	This function needs immediate attention. It is likely the primary source of your most recurring operational problems.

## What to do with your results

Find your lowest-scoring section. That's your bottleneck — and likely the root cause of problems you've been treating as symptoms in other areas.

If you'd like to talk through what you found, we're happy to walk through it with you. No pitch — just a conversation about what the score reveals and where the highest-leverage fix is.

**Email:** [resources@nextcrew.com](mailto:resources@nextcrew.com)    **Phone:** 888-228-7813    **Website:** [nextcrew.com](http://nextcrew.com)