

CHECKLIST · LEADERSHIP DISCUSSION GUIDE

Operational Capacity and Scalability Checklist

A Leadership Discussion Guide for Identifying Hidden Capacity Constraints

Before adding equipment, space, inventory, technology, or headcount, use this guide to identify the operating symptoms that deserve closer attention. It applies to production, distribution, fulfillment, supply chain, field operations, service delivery, and other process-driven businesses.

This checklist is not an operational diagnosis. It is designed to help leaders surface where the business may be compensating for a deeper constraint. TriVista validates symptoms through data, observation, and employee input before recommending a path forward.

How to use this guide

- ▶ Review each statement as a leadership team or with the functional leaders closest to the work
- ▶ Discuss the prompt below each section. Focus on the symptoms with the greatest effect on customers, revenue, EBITDA, working capital, or risk
- ▶ Mark the response that best reflects current operating reality. Use "Rarely / unknown" when the condition is not reliably true or no one can verify it
- ▶ Do not total responses into a score. A single recurring symptom can reveal a material constraint

01 Capacity Planning and Demand

	OFTEN	SOMETIMES	RARELY / UNK.	N/A
Demand, backlog, and expected growth are understood differently by commercial, planning, and operations teams.	☐	☐	☐	☐
Production plans consistently fall short of expectations, despite available equipment and labor.	☐	☐	☐	☐
The organization struggles to explain why actual output differs from planned output.	☐	☐	☐	☐
The business uses overtime, inventory, or expediting to protect customer commitments.	☐	☐	☐	☐

Leadership discussion: Which symptom is creating the greatest risk to revenue, throughput, or customer commitments?

02 Commercial, Engineering, and Order Flow

	OFTEN	SOMETIMES	RARELY / UNK.	N/A
Customer requirements, engineering changes, or order updates frequently reach operations incomplete, late, or in multiple versions.	☐	☐	☐	☐
Commercial priorities are communicated as urgent requests rather than clear operating requirements.	☐	☐	☐	☐
Work routinely waits for approvals, specifications, configurations, drawings, or customer decisions.	☐	☐	☐	☐

Leadership discussion: Where does the handoff from customer demand to execution most often break down?

03 Process Flow and Cross-Functional Handoffs

	OFTEN	SOMETIMES	RARELY / UNK.	N/A
Work, materials, or information waits between functions even when each individual team appears busy.	☐	☐	☐	☐
The visible bottleneck moves, but the same delays and workarounds keep returning.	☐	☐	☐	☐
Teams rely on workarounds or individual heroics to keep orders moving.	☐	☐	☐	☐

Leadership discussion: Which handoff creates the most friction for customers, employees, or overall throughput?

04 Equipment Reliability and Preventive Maintenance

	OFTEN	SOMETIMES	RARELY / UNK.	N/A
Unplanned downtime, disruptions, or resource unavailability regularly alters the day's plan.	☐	☐	☐	☐
Maintenance or readiness work is deferred until equipment, tools, or facilities create an immediate problem.	☐	☐	☐	☐
The primary causes of downtime and lost production time are not consistently measured or understood.	☐	☐	☐	☐

Leadership discussion: Which reliability issue has the greatest hidden impact on capacity or customer service?

05 Changeovers, Labor, and Resource Readiness

	OFTEN	SOMETIMES	RARELY / UNK.	N/A
Work starts without all required people, tools, materials, information, or approvals in place.	☐	☐	☐	☐
Setup, transition, or changeover time is unpredictable or routinely consumes planned production time.	☐	☐	☐	☐
Some teams are overloaded while others wait for work, information, or resources.	☐	☐	☐	☐

Leadership discussion: What would be different if every shift began with people and resources fully ready?

06 Scheduling and Execution

	OFTEN	SOMETIMES	RARELY / UNK.	N/A
Schedules change so often that they lose credibility, and teams begin managing work independently, creating workarounds and their own priority lists.	☐	☐	☐	☐
Production, packaging, warehousing, transportation, or service teams learn about changes too late to respond efficiently.	☐	☐	☐	☐
Expediting is a common method for meeting customer commitments.	☐	☐	☐	☐

Leadership discussion: Where does poor information flow or schedule instability create the most inefficiency?

07 Inventory, Materials, and Supplier Flow

	OFTEN	SOMETIMES	RARELY / UNK.	N/A
Material shortages occur despite system or inventory records showing material or resources should be available.	☐	☐	☐	☐
Inventory buffers, excess stock, or emergency purchases compensate for planning or process problems.	☐	☐	☐	☐
Critical suppliers, lead times, and delivery performance are not visible in the operating plan.	☐	☐	☐	☐

Leadership discussion: Which material or supplier issue most often forces teams to change the plan?

Additional signs that capacity may be constrained

08 Quality, Hidden Costs, and Customer Service

	OFTEN	SOMETIMES	RARELY / UNK.	N/A
Rework, scrap, returns, and quality issues consume time and capacity that was never planned.	☐	☐	☐	☐
Quality or service issues disrupt the schedule and pull resources from planned work.	☐	☐	☐	☐
Customer inquiries, complaints, or order-status issues expose gaps between what was promised and what operations can deliver.	☐	☐	☐	☐

Leadership discussion: Which quality, hidden-cost, or customer-service symptom is most damaging to trust or profitability?

09 Distribution and Fulfillment

	OFTEN	SOMETIMES	RARELY / UNK.	N/A
Receiving, storage, picking, packing, staging, shipping, or equivalent work regularly becomes the constraint rather than production.	☐	☐	☐	☐
Space feels constrained, but the cause may be inventory mix, layout, workflow, or scheduling.	☐	☐	☐	☐
Dock, staging, handoff, or transportation delays disrupt delivery commitments.	☐	☐	☐	☐

Leadership discussion: What is the most persistent fulfillment constraint affecting customers or cost?

10 Data, Systems, and Visibility

	OFTEN	SOMETIMES	RARELY / UNK.	N/A
Teams rely on spreadsheets, duplicate entry, manual reports, or informal updates to run day-to-day operations.	☐	☐	☐	☐
Leaders receive different answers to the same question depending on the source or team.	☐	☐	☐	☐
Performance reviews and KPIs focus on yesterday's results rather than tomorrow's risks.	☐	☐	☐	☐
Leaders lack confidence that planning, capacity, inventory, lead time, and production data accurately reflect current operations.	☐	☐	☐	☐

Leadership discussion: What operating decision would improve most if leaders had timely, trusted information?

11 Management Systems, Communication, and Culture

	OFTEN	SOMETIMES	RARELY / UNK.	N/A
Meetings identify problems but end without clear ownership, timing, or follow-through.	☐	☐	☐	☐
Teams manage through urgency and escalation instead of consistent daily and weekly routines.	☐	☐	☐	☐
The same operational issues are discussed repeatedly without permanent resolution.	☐	☐	☐	☐
Employees hesitate to raise problems, or recurring issues stay within functional silos.	☐	☐	☐	☐

Leadership discussion: Which communication, ownership, or cultural pattern most keeps the organization reactive?

12 Investment Readiness

	OFTEN	SOMETIMES	RARELY / UNK.	N/A
A request for equipment, space, inventory, technology, or headcount is based on a visible pain point rather than a validated constraint.	☐	☐	☐	☐
The organization has not tested whether reliability, scheduling, workflow, labor balance, quality, or material flow could relieve the need.	☐	☐	☐	☐
The projected capacity gain, full cost, and financial return of an investment are unclear.	☐	☐	☐	☐

Leadership discussion: What must be validated before committing capital or adding resources?

What do these signals suggest?

One recurring symptom can undermine an otherwise capable operation. A schedule that changes every day, a persistent material shortage, a maintenance issue, or a breakdown between teams may be the visible sign of a deeper cross-functional constraint.

Rather than applying a standard playbook, TriVista works with leadership teams to understand the operating reality, validate the constraint through data, observation, and employee input, quantify the value at stake, and co-create a practical path forward.

Validate the operating reality

Data

What do operating and financial measures indicate?

Observation

What is physically happening in the process?

Employee input

Where do teams experience recurring delays, workarounds, or frustration?

When all three point to the same issue, leadership has a stronger basis for action.

Leadership discussion questions

1. Which symptom creates the greatest impact on customers, revenue, EBITDA, working capital, or risk?
2. Where are we compensating through overtime, inventory, expediting, extra resources, or workarounds?
3. What do we believe is the underlying constraint? Do the data, observation, and employee input support that conclusion?
4. Which handoff or communication gap is making the issue harder to solve?
5. What can we improve before adding equipment, space, inventory, technology, or headcount?
6. What routines, ownership, and leadership behaviors would be required to sustain the improvement?

A MORE GROUNDED PATH TO CAPACITY DECISIONS

Every operating situation is different. TriVista helps leadership teams understand the realities behind the symptoms, validate the constraint, quantify the value at stake, and co-create a tailored path to improved capacity and performance.

[Talk with an Operations Improvement Expert >](#)

 TRIVISTA