



AGENCY OPERATIONS

Service delivery audit

A periodic audit for checking whether the way you sell, start, deliver, approve, and bill work still matches your standards.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

You want to find operational friction across the whole client journey.

WORK THROUGH THE CHECKLIST

- ☐ 01 **Audit sales handoff**

- ☐ 02 **Audit kickoff**

- ☐ 03 **Audit delivery visibility**

- ☐ 04 **Audit approval records**

- ☐ 05 **Audit billing handoff**

- ☐ 06 **Prioritize one improvement**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.

This practical workflow resource is not legal, financial, tax, or security advice. Adapt it to your team and circumstances.