System Operating Model Diagnostic Checklist

Purpose:
This checklist is a diagnostic tool designed to surface operating-model pressures early, before system choices become long-term constraints. It is not a scorecard and does not prescribe a single correct answer.

How to use this checklist:
Mark statements that are true in practice today.

- Do not aim to minimize checked boxes.
- Look for patterns across sections rather than totals.
- Use the results to make tradeoffs explicit.

Problem & Stability

☐ Requirements are expected to change materially in the next 12–24 months (rules, scope, or expectations are evolving)

☐ The problem space is still being actively discovered (solutions are not yet well understood)

☐ The workflow is central to how the organization operates (core to value, risk, or decision-making)

☐ The system is expected to support differentiation, not just efficiency (enable better outcomes, not only lower cost)

Platform Fit & Flexibility

☐ The vendor's happy path does not match real workflows (assumes idealized inputs and behavior)

☐ We expect to customize behavior beyond configuration (logic cannot live only in settings)

☐ We already rely on workarounds or manual steps (spreadsheets, scripts, side processes)

☐ Business rules live outside the platform (glue code or transformations elsewhere)

Complexity Location

☐ Complexity is pushed to integrations rather than the core system

☐ Debugging requires understanding multiple ownership boundaries

☐ System behavior is difficult to explain end-to-end

☐ Small changes require disproportionate effort

Ownership & Risk

☐ No single team fully owns system outcomes

☐ Vendor support resolves symptoms, not root causes

☐ Critical knowledge is concentrated in a few individuals

☐ Loss of internal expertise would materially impact operations

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Long-Term Cost Signals

☐ Ongoing retraining is expected as workflows evolve

☐ Switching platforms later would be costly or risky

☐ The system locks us into a specific operating model

☐ Operational burden is increasing faster than delivered value

Operating Model Leaning Guide

This guide helps interpret patterns in the checklist. It does not prescribe a single answer. Use it to understand which operating model your current signals most closely resemble.

Enterprise Operating Model (Standardized)

You may lean toward an enterprise operating model when most checks indicate:

- Requirements are relatively stable
- Workflows align with vendor assumptions
- Customization is limited and intentional
- Ownership boundaries are clear
- Efficiency and consistency are prioritized

Primary tradeoff: Standardization over adaptability.

Hybrid Operating Model (Enterprise + Custom)

You may lean toward a hybrid operating model when checks cluster around flexibility and complexity:

- Core workflows require customization
- Enterprise tools provide foundational capabilities
- Custom logic lives intentionally at defined boundaries
- Integration complexity is accepted and managed

Primary tradeoff: Coordination overhead in exchange for targeted control.

Custom Operating Model (Purpose-Built)

You may lean toward a custom operating model when checks cluster around change, ownership, and differentiation:

- Requirements are evolving or uncertain
- The workflow is central to how the organization operates
- Differentiation is a priority
- Ownership must remain tightly coupled to execution

Primary tradeoff: Higher upfront investment for long-term flexibility.

*** Mixed patterns are common and often indicate unclear boundaries, multiple workflows with different needs, or systems in transition. Misalignment matters more than the model itself.