Scaling Operations Checklist

15 Critical Questions for Growing Solar Installation Businesses

How to Use This Assessment

Answer each question honestly based on your current operations, not how you hope things work. For each 'no' answer, review what that gap typically costs businesses at scale.

This isn't about achieving perfection before growing—it's about understanding which limitations will become critical bottlenecks at higher volume, so you can address them proactively rather than reactively.

Scoring Guide

12-15 'Yes' Answers: Strong Operational Foundation

Ready to scale to 2-3x current volume without major system changes

8-11 'Yes' Answers: Growth Viable with Planning

Some gaps to address but growth is viable with targeted improvements

4-7 'Yes' Answers: Significant Improvements Needed

Address high-impact gaps before aggressive scaling

0-3 'Yes' Answers: Foundation Work Required

Build operational foundations before adding capacity

Scheduling & Dispatch (Questions 1-3)

Can your scheduling and dispatch processes handle 2-3x current installation volume without proportionally increasing coordination time?

1 **Can you communicate a complete job (site details, specs, equipment list, access notes, DNO status) to field teams in under 5 minutes without phone calls or long message threads?**

☐ Yes ☐ No

Typical Cost of 'No':

At 100 installs/month, communication overhead for scheduling typically requires 1.5-2 full-time equivalent staff positions. Structured dispatch can reduce this by 60-70%.

2 **When a job gets delayed or rescheduled, can you reassign teams and reallocate equipment in under 15 minutes with confidence that everyone affected gets notified automatically?**

☐ Yes ☐ No

Typical Cost of 'No':

Businesses handling 15-20 schedule changes per week spend 30-40 hours monthly just coordinating the cascade effects. Equipment sits idle 10-15% of the time due to allocation gaps.

3 **Can you see your installation capacity (teams, equipment availability, upcoming commitments) for the next 4-6 weeks at a glance without**

consulting multiple spreadsheets or people?

☐ Yes ☐ No

Typical Cost of 'No':

Poor capacity visibility leads to 15-25% capacity utilization gaps from over-committing or under-committing.

Equipment & Inventory Management (Questions 4-6)

Can you track and manage equipment worth £500,000+ across multiple teams, sites, and vehicles without losses or emergency purchases?

4 **Can you locate any piece of equipment (inverter, battery, scaffolding tower, tools) within 60 seconds and know its status (available, allocated to job, in repair)?**

☐ Yes   ☐ No

Typical Cost of 'No':

Installation businesses managing £500,000+ in equipment with manual tracking make £50,000-150,000 in unnecessary emergency purchases annually.

5 **When a job gets postponed, does your system automatically free up allocated equipment so it can be reassigned to other jobs without manual tracking updates?**

☐ Yes   ☐ No

Typical Cost of 'No':

Disconnected scheduling and equipment tracking leads to 10-20% of equipment sitting idle in 'phantom allocations' to postponed jobs.

6 **Can field teams log equipment issues (damage, defects, missing components) from site, triggering automatic reassignment and repair workflows?**

☐ Yes   ☐ No

Typical Cost of 'No':

> Teams arriving on site with faulty equipment cause 2-4 hour delays. This happens 5-10 times per month without equipment status tracking, costing £800-1,500 monthly.

Compliance & Documentation (Questions 7-9)

Can your compliance and documentation processes handle 100+ installations per month without backlogs, errors, or proportional staff increases?

7 **Can you generate complete MCS certification documentation in under 45 minutes per installation using data captured during the installation rather than manually compiling information afterward?**

☐ Yes ☐ No

Typical Cost of 'No':

At 100 installations per month, manual MCS processing requires 200-300 hours monthly—1.5-2 full-time positions. This becomes a major cash flow bottleneck.

8 **Do you have automated tracking of DNO applications, approvals, and notification requirements that prevents commissioning before approvals and ensures timely G98/G99/G100 submissions?**

☐ Yes ☐ No

Typical Cost of 'No':

Businesses processing 80-100 installations monthly report 5-10 DNO notification failures per month. Each failure costs £200-400 in remediation work.

9 **Can you retrieve complete installation documentation (photos, forms, certificates, approvals) for any job within 2 minutes when auditors, customers, or developers request it?**

☐ Yes ☐ No

Typical Cost of 'No':

Documentation retrieval requiring 30-60 minutes adds up to 15-25 hours monthly at scale. Failed audits or compliance issues due to lost documentation are far more costly.

Quality Control & Auditing (Questions 10-12)

Can you maintain installation quality at scale through systematic, rapid auditing that catches issues while they're still cheap to fix?

10 **Are installation photos and documentation reviewed within 24-48 hours of job completion (while scaffolding is typically still on site)?**

☐ Yes   ☐ No

Typical Cost of 'No':

Issues identified within 48 hours cost £50-150 to fix. The same issues found 2+ weeks later cost £500-800. At 100 installs/month with 8% requiring fixes, late discovery costs an extra £36,000-52,000 monthly.

11 **Can you identify quality patterns across teams and installers (who has high defect rates in specific areas, which installation types have common issues) to target training and process improvements?**

☐ Yes   ☐ No

Typical Cost of 'No':

Without pattern visibility, the same quality issues repeat. Systematic quality analysis and targeted training reduces overall defect rates by 40-60% within 6 months.

12 **Do you have mandatory photo evidence requirements (specific shots that must be captured before installers can complete a job) that ensure audit-critical documentation is never missing?**

☐ Yes   ☐ No

Typical Cost of 'No':

> Missing critical photos require site revisits purely for documentation—costing £150-300 per incident. This happens 3-8 times per month without enforced photo requirements.

Field-Office Communication (Questions 13-15)

Can information flow seamlessly between field teams and office without phone calls, lost messages, or data trapped on phones and paper?

13 **Can field teams access complete job information (site details, specs, drawings, DNO status, special requirements) offline on their mobile devices while on site?**

☐ Yes   ☐ No

Typical Cost of 'No':

Field teams spend 30-60 minutes per job waiting for callbacks or working with incomplete details. At 100 installs/month, this is 50-100 hours of wasted field time monthly, costing £1,500-3,000.

14 **Do installation photos and data captured in the field reach the office automatically in real-time (or as soon as teams have signal), without requiring manual photo sharing or form delivery?**

☐ Yes   ☐ No

Typical Cost of 'No':

Photos trapped on devices delay auditing by 1-3 weeks, making quality issues 5-8x more expensive to fix. Data re-entry from paper forms consumes 15-25 hours monthly and introduces 3-8% error rates.

15 **Can you see real-time installation status (not started, in progress, completed, issues identified) across all active jobs without calling field teams or waiting for end-of-day reports?**

☐ Yes   ☐ No

Typical Cost of 'No':

Without real-time status, office teams can't proactively respond to issues or communicate accurately with customers. This 'visibility lag' doubles the impact of problems that could be solved today.

Your Score

Count your 'Yes' answers:

Category 1	Category 2	Category 3	Category 4	Category 5
___ / 3	___ / 3	___ / 3	___ / 3	___ / 3

Total: _____ / 15

What These Gaps Cost: The Numbers

Based on data from installation businesses scaling from 50 to 150+ installations per month:

£25,000-45,000/month

Scheduling and communication inefficiencies (Questions 1-3) at 100 installs/month

£15,000-30,000/month

Equipment tracking gaps and emergency purchases (Questions 4-6)

£30,000-50,000/month

Compliance processing overhead and DNO failures (Questions 7-9)

£35,000-60,000/month

Late-discovery quality issues and repeat defects (Questions 10-12)

£20,000-35,000/month

Field communication gaps and data re-entry (Questions 13-15)

£125,000-220,000/month

Combined impact for businesses scoring 0-7 'yes' answers

£1.5M-2.6M/year

Next Steps

- **Share this assessment:** Have your Operations Director, Installation Manager, Compliance Manager, and CEO complete it independently, then compare results.

- **Quantify the impact:** Calculate actual costs based on your volume, wage rates, and specific circumstances.

- **Map to your growth timeline:** When do current systems hit their breaking point? Address those constraints before you hit them.

- **Prioritize by impact:** The gaps costing you the most money deserve attention first.

- **Explore solutions:** Whether you build custom systems, adopt specialized software, or improve processes manually, approach improvements systematically.