



FREE OWNER RESOURCE

Independent Pharmacy Operations Scorecard

A 50-item self-assessment across the operating systems
that influence efficiency, cash, consistency and business resilience.

Pharmacy Operations. Ownership. Growth.

Build better. Operate smarter. Grow with purpose.

How to score your pharmacy

Rate each statement from **1 to 5**. Score the operation as it works today - not how you intend it to work.

Score	Rating	What it means
1	Not in place	Reactive / inconsistent
2	Weak	Exists informally or inconsistently
3	Functional	Generally works but has gaps
4	Strong	Defined, measured and reliable
5	Excellent	Systematic, resilient and continuously improved

50 questions x 5 points = 250 possible points. At the end, total each domain and then calculate your overall score.

1. WORKFLOW & PRESCRIPTION FLOW

#	Statement	1	2	3	4	5
1	Work moves in a defined sequence from intake through production, verification, pickup or delivery.					
2	Technician and pharmacist responsibilities are clear and minimize unnecessary handoffs.					
3	Workstations, queues and physical layout support the actual prescription flow.					
4	Exceptions (rejects, transfers, partials, out-of-stocks, clarifications) have defined ownership.					
5	Wait-time and backlog issues are measured and addressed rather than normalized.					
DOMAIN TOTAL						/ 25

Notes / biggest opportunity: _____

2. INVENTORY & WORKING CAPITAL

#	Statement	1	2	3	4	5
1	Inventory levels are intentionally managed against dispensing demand and cash constraints.					
2	High-cost products have specific ordering, replenishment and return controls.					
3	Cycle counts, outdates, excess inventory and return-to-stock are managed on a defined cadence.					
4	The pharmacy monitors dead stock and short-dated inventory before it becomes a loss.					
5	Purchasing decisions account for cash impact, not only acquisition price.					
DOMAIN TOTAL						/ 25

Notes / biggest opportunity: _____

3. STAFFING & LABOR UTILIZATION

#	Statement	1	2	3	4	5
1	Staffing levels are aligned with prescription volume, workload peaks and service mix.					
2	Roles are matched to the lowest appropriate level of labor without compromising safety or compliance.					
3	Schedules reflect predictable demand patterns rather than historical habit.					
4	Cross-training reduces dependence on a single employee for critical functions.					
5	Overtime, idle time and recurring bottlenecks are reviewed as operating signals.					
DOMAIN TOTAL						/ 25

Notes / biggest opportunity: _____

4. SOPS & AUDIT READINESS

#	Statement	1	2	3	4	5
1	Core SOPs reflect the pharmacy's actual operation rather than generic templates only.					
2	Staff can find and follow current procedures without relying on one manager's memory.					
3	Controlled substances, recalls, returns, deliveries, privacy, security and QA have defined processes.					
4	Required records, logs and documentation are reviewed on a recurring schedule.					
5	Audit readiness is maintained continuously rather than assembled after an audit notice.					
DOMAIN TOTAL						/ 25

Notes / biggest opportunity: _____

5. PURCHASING, REIMBURSEMENT & MARGIN DISCIPLINE

#	Statement	1	2	3	4	5
1	The pharmacy reviews gross-profit and reimbursement trends, not revenue alone.					
2	Negative-margin and unusually low-margin claims are identified and investigated.					
3	Primary/secondary sourcing is governed by a defined purchasing strategy.					
4	Contract, network and reconciliation responsibilities are understood by ownership/management.					
5	The team has controls for expensive products, reversals, rebills and uncollected balances.					
DOMAIN TOTAL						/ 25

Notes / biggest opportunity: _____

6. DELIVERY, PICKUP & PATIENT SERVICE

#	Statement	1	2	3	4	5
1	Delivery volume, routes, cutoffs, failed deliveries and redelivery costs are measured.					
2	Pickup and will-call processes minimize lost prescriptions and aged inventory.					
3	Patient communication for out-of-stocks, delays and insurance issues is standardized.					
4	Delivery documentation, chain-of-custody and privacy processes are consistently followed.					
5	Service expectations are designed around what the pharmacy can reliably execute.					
DOMAIN TOTAL						/ 25

Notes / biggest opportunity: _____

7. TECHNOLOGY & DATA USE

#	Statement	1	2	3	4	5
1	The pharmacy management system is configured to support workflow rather than simply process claims.					
2	Reports for inventory, rejections, financial performance and workload are reviewed routinely.					
3	Manual workarounds are periodically evaluated for automation or elimination.					
4	User access, passwords, backups and cybersecurity practices are actively managed.					
5	Key business decisions are supported by data from the pharmacy's systems.					
DOMAIN TOTAL						/ 25

Notes / biggest opportunity: _____

8. CLINICAL SERVICES & REVENUE DIVERSIFICATION

#	Statement	1	2	3	4	5
1	New services are selected based on patient need, market fit and financial sustainability.					
2	Clinical or non-dispensing services have defined workflow, staffing and documentation requirements.					
3	The pharmacy knows which services generate revenue, margin, retention or strategic value.					
4	Growth initiatives have an owner, target, implementation plan and success metric.					
5	The pharmacy avoids adding programs that create workload without a clear business case.					
DOMAIN TOTAL						/ 25

Notes / biggest opportunity: _____

9. MANAGEMENT, KPIS & ACCOUNTABILITY

#	Statement	1	2	3	4	5
1	Ownership/management reviews a defined operating scorecard at least monthly.					
2	KPIs include operational measures (not only sales) such as inventory, labor and workflow performance.					
3	Recurring problems are assigned an owner, due date and follow-up process.					
4	Managers distinguish urgent daily issues from structural problems requiring redesign.					
5	Performance expectations are communicated clearly to the team.					
DOMAIN TOTAL						/ 25

Notes / biggest opportunity: _____

10. BUSINESS RESILIENCE & OWNERSHIP READINESS

#	Statement	1	2	3	4	5
1	The pharmacy can operate without the owner personally solving every exception.					
2	Critical vendor, payer, banking, licensing and emergency contacts are documented.					
3	Business continuity and disruption plans are current and practical.					
4	The owner understands major concentration risks such as one payer, prescriber, employee or service line.					
5	Operational systems would make the business easier to transfer, scale or sell.					
DOMAIN TOTAL						/ 25

Notes / biggest opportunity: _____

Your AdviseRx Operations Score

Domain	Score
Workflow & Prescription Flow	/25
Inventory & Working Capital	/25
Staffing & Labor Utilization	/25
SOPs & Audit Readiness	/25
Purchasing, Reimbursement & Margin Discipline	/25
Delivery, Pickup & Patient Service	/25
Technology & Data Use	/25
Clinical Services & Revenue Diversification	/25
Management, KPIs & Accountability	/25
Business Resilience & Ownership Readiness	/25
TOTAL	/ 250

210-250 STRONG OPERATING SYSTEM

The pharmacy appears well-systematized. Focus on refinement, scalability and protecting what already works.

170-209 STABLE, WITH OPPORTUNITIES

The operation is functional but likely has several areas where inconsistency or wasted effort is affecting performance.

130-169 NEEDS ATTENTION

Multiple operating systems are likely dependent on workarounds, individual employees or reactive management.

Below 130 HIGH OPERATIONAL RISK

The business may have substantial workflow, inventory, documentation, labor or management vulnerabilities that deserve structured review.

Do not stop at the total score

Your lowest domains often matter more than the overall number. A pharmacy can score well overall while still carrying concentrated risk in inventory, SOPs, staffing, reimbursement discipline, or owner dependence.

Turn your score into a 90-day plan

Improvement works best when the pharmacy selects a small number of high-impact priorities, assigns ownership, and measures whether the change actually worked.

Choose your top 3 priorities

1	Priority: _____	Owner: _____	Target date: _____
2	Priority: _____	Owner: _____	Target date: _____
3	Priority: _____	Owner: _____	Target date: _____

30 / 60 / 90-day execution plan

FIRST 30 DAYS	Focus: Fix the most urgent control gap and establish a baseline metric. Action: _____ Metric: _____
BY DAY 60	Focus: Standardize the new process, train the team, and review early results. Action: _____ Metric: _____
BY DAY 90	Focus: Measure impact, adjust the process, and decide what improvement comes next. Action: _____ Metric: _____

Questions to ask at the 90-day review

- ☐ Did the change improve the metric we selected?
- ☐ Did it reduce workload or merely move work somewhere else?
- ☐ Can the process work when the owner or strongest employee is absent?
- ☐ Is the new process documented and understood by the team?
- ☐ What is now the highest-impact operational constraint?

Want an outside operational assessment?

AdviseRx can evaluate workflow, inventory, staffing, SOPs and management systems, then build a prioritized improvement roadmap based on the highest-impact opportunities.

Book a 15-minute strategy call: calendly.com/adviserx/15mins
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This scorecard is a business-operations self-assessment and does not constitute legal, regulatory, financial, accounting, or clinical advice.