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## SAMPLE Account health check



### Overall Account Health

#### Overview

<b>A. Workspaces</b>	<b>50%</b>
<b>B. Boards, Dashboards, Docs</b>	<b>75%</b>
<b>C. Automations</b>	<b>N/A</b>
<b>D. Integrations</b>	<b>N/A</b>
<b>E. General Cleanliness</b>	<b>100%</b>
<b>F. Permissions &amp; Governance</b>	<b>100%</b>
<b>G. Knowledge Centre</b>	<b>0%</b>





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## Recommendations

- Create a knowledge centre for your monday account.
- Use Templates to standardise use of monday docs - you can link to the template inside boards with the 'Files' column.
- Visit the Column Centre to see how you can use columns more efficiently.
- Spend some time to tidy up the structure of your folders & boards within workspaces.
- Use 'Search Everything' function (top left corner) to directly locate client boards without having to display the full list & reveal other client info.

Report Prepared By:



**Durga Alagirisamy**  
Business Process  
Consultant  
Australia

**Reply to my email** to explore how we can help you optimise your monday.com account health.



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**Disclaimer:**

This report is to provide your team with some high-level tips and suggestions for improving your current monday.com usage.

The final Account Health score is an indication of what we were able to review within the session only.

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