

BUSINESS HEALTH CHECK

*Please rate each line with an (x) as either poor if you don’t have at all. Fair if you have but don’t use. Average if you use poorly. Good if you have and use well and excellent if you have and it’s utilised excellently.*

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| --- | --- | --- | --- | --- | --- |
|  | **Poor** | **Fair** | **Average** | **Good** | **Excellent** |
| **LEADERSHIP** |  |  |  |  |  |
| Vision, Mission, Values |  |  |  |  |  |
| Time Management Structure |  |  |  |  |  |
| Task Log with critical tasks |  |  |  |  |  |
| Primary Aim |  |  |  |  |  |
| Business Story |  |  |  |  |  |
| Business Goals 1 – 5 years |  |  |  |  |  |
| Progressive Goals 1 – 5 years |  |  |  |  |  |
| Business KPI’s |  |  |  |  |  |
| Smart Business Plan |  |  |  |  |  |
| **MARKETING** |  |  |  |  |  |
| Ideal Customer Avatar |  |  |  |  |  |
| Ideal Customer Buying Journey |  |  |  |  |  |
| Unique Selling Proposition |  |  |  |  |  |
| Marketing Strategy |  |  |  |  |  |
| Compelling front-end offer |  |  |  |  |  |
| Upselling / down-selling offer |  |  |  |  |  |
| Lead Generation Channels |  |  |  |  |  |
| Lead Generation Budget Planner |  |  |  |  |  |
| Lead Generation Cost & Coverage |  |  |  |  |  |
| Customer Referral Programme |  |  |  |  |  |
| Joint Ventures |  |  |  |  |  |
| eBook |  |  |  |  |  |
| Website |  |  |  |  |  |
| Membership Programme |  |  |  |  |  |
| Frequent Buyer Programme |  |  |  |  |  |
| Back End Direct Offers |  |  |  |  |  |
| Testimonials and Reviews |  |  |  |  |  |
| Customer Satisfaction KPI’s |  |  |  |  |  |
| Annual Marketing Calendar |  |  |  |  |  |
| Marketing KPI’s |  |  |  |  |  |
| **OPERATIONS** |  |  |  |  |  |
| Key Process Map |  |  |  |  |  |
| Workflow and system for operations |  |  |  |  |  |
| Workflow and system for quotes |  |  |  |  |  |
| Workflow and system for Sales |  |  |  |  |  |
| Workflow and system for administration |  |  |  |  |  |
| Workflow for Project Management |  |  |  |  |  |
| System for Project Management |  |  |  |  |  |
| Workflow for Quality management |  |  |  |  |  |
| System for Quality Management |  |  |  |  |  |
| **TEAM** |  |  |  |  |  |
| Organisational Chart (Years 1 – 5) |  |  |  |  |  |
| Sourcing Strategy |  |  |  |  |  |
| Recruitment and Hiring Strategy |  |  |  |  |  |
| Job Analysis |  |  |  |  |  |
| Ideal Candidate |  |  |  |  |  |
| Job descriptions |  |  |  |  |  |
| Job Adverts |  |  |  |  |  |
| Online Interview Questionnaire |  |  |  |  |  |
| Pre-Interview Skills Check |  |  |  |  |  |
| Applicant Appraisal form template |  |  |  |  |  |
| Face to Face interview Questionnaire |  |  |  |  |  |
| Interview Checklist Template |  |  |  |  |  |
| Job Candidate Evaluation Template |  |  |  |  |  |
| Reference check template |  |  |  |  |  |
| Job offer template |  |  |  |  |  |
| Rejection letter template |  |  |  |  |  |
| Staff Training and Development Strategy |  |  |  |  |  |
| Staff KPI Dashboard |  |  |  |  |  |
| Performance Reviews |  |  |  |  |  |
| Professional Development |  |  |  |  |  |
| Monthly one-on-ones |  |  |  |  |  |
| Staff Time Management |  |  |  |  |  |
| Staff Skills checklist |  |  |  |  |  |
| Staff Task Log |  |  |  |  |  |
| Staff Accountability Dashboard |  |  |  |  |  |
| Disciplinary Process |  |  |  |  |  |
| Exit Interview Process & Template |  |  |  |  |  |
| **FINANCIAL** |  |  |  |  |  |
| Budgets |  |  |  |  |  |
| Financial reporting |  |  |  |  |  |
| Credit Control |  |  |  |  |  |
| Profit & Loss - Monthly |  |  |  |  |  |
| Balance Sheet |  |  |  |  |  |
| Debtor Control |  |  |  |  |  |
| Cashflow Forecast |  |  |  |  |  |
| Money Management (personal) |  |  |  |  |  |
| **BUSINESS OWNER HABITS** |  |  |  |  |  |
| Uses a to-do List, priorities and follows |  |  |  |  |  |
| On time to Meetings |  |  |  |  |  |
| Takes responsibility for their results |  |  |  |  |  |
| Time to do everything they desire in life |  |  |  |  |  |
| Maintains a healthy body |  |  |  |  |  |
| Maintains a healthy mind |  |  |  |  |  |
| Has healthy relationships with friends |  |  |  |  |  |
| Has healthy relationships with family |  |  |  |  |  |
| Has healthy relationships with staff |  |  |  |  |  |
| Does what they say they will do |  |  |  |  |  |
| Spends 4 hours a week on the business |  |  |  |  |  |
| Keep to their organized commitments |  |  |  |  |  |
| Motivated |  |  |  |  |  |
| Goal orientated |  |  |  |  |  |
| High standards |  |  |  |  |  |
| Wants to be the best they can be |  |  |  |  |  |
| Enjoys and makes time for reading |  |  |  |  |  |

*Please review the areas that your business is lacking. Without all of these areas being in place and performing at an excellent standard, you will always be working hard instead of smart and you will be always leaving a lot of money on the table. If you would like to take our other FREE tests: Leadership assessment. Limiting Financial Beliefs test and Limiting marketing beliefs test, please email us at* [*kirsty@sunshineconsulting.com.au*](mailto:kirsty@sunshineconsulting.com.au) *and we’ll send you the link.*