



BUSINESS HEALTH CHECKLIST

Your Step-by-Step Guide to Identify Gaps, Strengthen Operations, and Position Your Business for Growth

▲ How to Use This Checklist

This assessment is designed to help you spot what's missing, unclear, or no longer working in your business. It's not about having it all figured out—it's about getting honest, so you can move forward with confidence.

▲ Directions:

- Check ✓ any item that's not working, unclear, or causing frustration.
 - This checklist is designed to help you pinpoint where your business needs support.
 - Bring your results to your Clarity Call—we'll help you turn the gaps into growth.
-

▲ SECTION 1: Financial Health

- ☐ Do you regularly review key financial statements (P&L, balance sheet, cash flow)?
 - ☐ Is your revenue growing and translating into consistent profit?
 - ☐ Do you understand your margins for each product/service?
 - ☐ Have you set a realistic budget and reviewed it in the past 90 days?
 - ☐ Is your pricing aligned with market value and business goals?
 - ☐ Do you have at least 3 months of operating expenses in reserves?
-

▲ SECTION 2: Customer & Market Clarity

- ☐ Do you have a clearly defined target customer profile or niche?
 - ☐ Are you regularly gathering feedback from customers (surveys, reviews)?
 - ☐ Is your customer retention rate improving or stable?
 - ☐ Do your offerings match what your ideal clients want now?
 - ☐ Is your brand messaging consistent and clear across all platforms?
 - ☐ Are your current marketing efforts generating qualified leads?
-

▲ SECTION 3: Operations & Workflow

- ☐ Are your internal processes documented and repeatable?
- ☐ Do team members clearly understand their roles and responsibilities?
- ☐ Have you identified and addressed time-wasting tasks or bottlenecks?
- ☐ Are you using tools or systems to automate repetitive tasks?
- ☐ Are you protected with updated insurance, licenses, and cybersecurity measures?
- ☐ Are you tracking key metrics (KPIs) to measure business performance?



▲ SECTION 4: Team & Leadership

- ☐ Do you have the right people in the right roles?
 - ☐ Is your team aligned with the company vision and values?
 - ☐ Are regular performance check-ins and feedback built into your workflow?
 - ☐ Are you delegating effectively—or still stuck in day-to-day tasks?
 - ☐ Do you have a succession or leadership development plan in place?
-

▲ SECTION 5: Strategic Growth & Innovation

- ☐ Do you have a written, updated growth plan for the next 12–24 months?
 - ☐ Have you reviewed market trends and competitors in the last 6 months?
 - ☐ Are you testing new revenue streams or product/service innovations?
 - ☐ Are you building partnerships or collaborations to support expansion?
 - ☐ Is your business adaptable to change—economy, tech, or customer needs?
-

▲ SECTION 6: Mindset & Vision Alignment

- ☐ Do you feel energized and focused as a leader most days?
 - ☐ Is your personal vision still aligned with the business you're building?
 - ☐ Are you creating space to work on the business, not just in it?
 - ☐ Do you have support systems (advisors, mentors, consultants) in place?
 - ☐ Are you setting and reviewing personal/professional goals regularly?
-

▲ SCORING (Optional)

For each “yes,” give yourself 1 point. Count your points in each section to see where you're struggling—and where clarity is needed.

- **22–30 points:** A deeper assessment to uncover hidden risks and opportunities.
 - **15–21 points:** Solid foundation, but some systems and strategy need attention.
 - **Under 15 points:** Your business is in strong health—focus on refining and growth.
-

▲ *Want Clarity on What's Next?*

Download your results and book a free 15-minute **Clarity Call** with our team. We'll help you turn this checklist into an actionable roadmap for growth.

GET STARTED NOW AND BOOK YOUR FREE CALL TODAY!

Email us at hello@firmvisibility.com



START FOCUSING ON WHAT MATTERS MOST