



BUSINESS  
CUT  
THROUGH

# THE ULTIMATE **BUSINESS HEALTH** QUESTIONNAIRE



40 QUESTIONS TO RANK  
YOUR BUSINESS PERFORMANCE

One would say Jeff Bezos of Amazon, knows a thing or two about business. He has become one of the world's richest men by having a clear business vision and building an innovative business to execute that vision. He once said "If you don't understand the details of your business, you are going to fail."

So, it's important to check in from time to time on the details so we have a thriving business.

As the business grows it forms its own life, a heartbeat, a beating pulse, a thirst for growth and success. As it grows it's important to be feeding it the right nutrients for it to grow and be healthy so it continues to evolve. Like humans, if we do not take care of ourselves, we become sick and so too does our business. If we starve it of the right nutrients (investments), it will slow down and become inefficient and cause pain. I have designed this questionnaire so you can review your business from a high-level viewpoint and see where you need to make some changes or invest in key skills so your business stays well fuelled and on its way to success.

#### How to use the worksheet:

- Give yourself a rank out of 10 for each question and record your answer in the place provided.
- The ranking of 1 is the weakest, your business needs the most help here. Ranking of 5 is the midpoint, your business just passes. Ranking of 10 is the strongest, your business needs no attention here.
- At the end of the questionnaire count your total score and record it in the place provided.
- Work out where your business rates on the business health check scale.
- Take action on the necessary areas your business needs attention.



**Some points:**

- Give yourself time to do this and don't rush it.
- Don't have any other distractions like a phone present. Turn off your computer notifications etc.
- Answer it honestly, there's no point in cheating yourself.
- The word "You" means you and your team.
- If you are unsure with some responses ask your team.

**The Business Health Check****Rank**

Q1) You have a clear business vision and purpose that everybody in the company can clearly articulate and is driven towards.

Q2) You have a clearly documented strategic plan that is aligned to your vision and purpose.

Q3) You have a clearly documented cultural charter that sets out your core values and desired behaviours that everybody in the company can articulate and abides by.

Q4) You have clearly documented goals, milestones with KPI's (key performance indicators) in each of your business functions.

Q5) You have key financial governance and systems in place that mitigates financial risk of failure and improves decision making eg. Budgets, cash flows, P&L, key ratios, debtor & creditor controls.

Q6) You have all legal agreements up to date and documented eg. Shareholder/ partnership, employment, supplier, customer, distribution, insurance agreements etc.

## The Ultimate Business Health Check

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Rank

Q7) You have a clear organisation & functionality chart that is staged out over the next 3 years of growth.

Q8) You have monthly or quarterly strategy meetings to review your results and innovate new strategy.

Q9) You are clear about all your customers pain points which your products and services solve for them.

Q10) You have identified your niche markets and have a clear go to market strategy.

Q11) You have a clear market position or point of differentiation from your competitors which you can demonstrate clearly and is known in your market.

Q12) Your pricing of your products and services is where you want it to be and matches your customer and market position.

Q13) You have a clearly documented operational marketing plan that is being executed on time and within budget.

Q14) You have a documented sales or engagement process that all staff understand and follow consistently.

Q15) Your business development plans for all of your individual sales or advisory team tie into a larger organisations plan and are being executed promptly.

Q16) You have a clearly documented strategy for building and managing ongoing strategic referral partnerships.

Q17) You receive consistent monthly new customer referrals through your strategic referral partners.

## The Ultimate Business Health Check

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Rank

Q18) You convert or close all new business opportunities that present themselves.

Q19) You have extensive sales methodology knowledge and have scripted each step of the sales or engagement meeting process.

Q20) You have documented customer service level agreements that ensures high levels of customer service and satisfaction which your team is meeting consistently.

Q21) Your customers rave about your business and give you lots of new customer referrals.

Q22) You have the right people and management skills in place to grow the business towards your vision.

Q23) You and your managers are excellent at building teams and managing poor performance.

Q24) You have a documented and clear recruitment process that enables you to find the best people for your roles.

Q25) You have a clearly documented induction or onboarding program for new staff and customers.

Q26) You have clearly documented functional roles and responsibilities for all staff (including directors or partners) with clear delegation and decision making parameters.

Q27) You have an effective and documented staff performance appraisal process in place that leads into individual personal development plans.

## The Ultimate Business Health Check

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Rank

Q28) Your company has good work life practises and encourages balance.

Q29) You conduct well functioning management and team meetings that drive effective and actionable business outcomes.

Q30) You hold your team (including directors or partners) accountable for tasks, action plans or agreements that have not been executed on time.

Q31) You conduct regular ongoing training that incorporates both professional and personal self-development that the team find valuable.

Q32) You constantly train or educate in leadership, communication and sales skills.

Q33) You have policies and procedures documented in all functional areas which are understood and followed by all staff.

Q34) You have excellent standardised processes eg. documents, systems, workpapers, tools in place that all staff follow religiously.

Q35) You have an effective CRM (customer relationship management) tool that is up to date and integrates with your marketing platforms seamlessly.

Q36) Your IT systems are backed up and tested regularly for disaster recovery.

Q37) Your capacity or production utilisation rate is exceeding your goals.

## The Ultimate Business Health Check

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	Rank
Q38) Your overall customer sales have profit write up not profit write off. (i.e. You were able to charge the full cost of the sale).	
Q39) Your team understands and is using your current technology to its fullest capability.	
Q40) Your physical work premises can meet your growth needs.	
<b>TOTAL SCORE</b>	

## Well Done!

Where does your business rank on the Business Health Check scale?

RANKING	SCORE
Thriving	360-400
Fit & Can Improve	320-359
Surviving	280-319
Struggling	240-279
Potentially Fatal	40-239

## What does your Business Health ranking mean?

### Thriving

Congratulations, you continue to invest in the future of your business and you are well on your path to achieving your vision. Your continuous investment in people, technology & systems has meant your business has scaled or may be ready to scale. At this stage development of new product or services or a strategic acquisition may be on the radar.

### Fit & Can Improve

Your business is very fit and healthy at this point. With a bit more investment into some key areas, your business could easily move into the thriving rank and take advantage of greater strategic growth opportunities. This may be more about honing your current management skills and utilising technologies to further drive efficiencies.

### Surviving

Your business seems to be doing ok but you have much more potential to improve in many areas. Your thinking needs to shift out of survival mode and identify what areas are going to have the greatest impact for business growth, scalability and return on investment. This is where you need to further invest and get some help or guidance.

### Struggling

You're missing opportunities because you haven't invested in the right areas and skills to give your business the competitive advantage it needs to grow. You might even be very busy but you feel like you are spinning your wheels and not getting ahead. Sometimes it feels like one step forward and three steps back. It's a frustrating and stressful place to be in as it often feels like others are to blame for the poor results. You can move out of this stage with the right guidance and expert help.

### Fatal

This is an extremely stressful stage. Your business is starved of the critical resources it needs to build and sustain growth. You need professional and expert help immediately to get your business turned around and profitable.

## Where to from here?

Let me help guide you to improving the overall health of your business with my various business advisory and coaching programs. Whether you are building, scaling or leveraging your business I can help and guide you to have the thriving business you want.

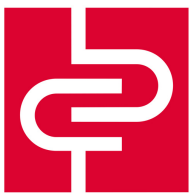
You can reach out and book in a phone or zoom call on;  
[info@businesscutthrough.com.au](mailto:info@businesscutthrough.com.au)

Find me on:

LinkedIn @rohanmusa,

Facebook @businesscutthrough

Instagram @business\_cut\_through



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