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# Business Health Checklist

Use this template to review the current health of your business.

Date: \_\_\_\_\_

Name \_\_\_\_\_

Business \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_ No. of Employees \_\_\_\_\_

Email \_\_\_\_\_

Is your business:

- ☐ Existing ☐ A new start up

If existing, how long has your business operated for?

- ☐ 1 year ☐ 2 years ☐ 3-5 years  
☐ More than 5 years

Does your business produce regular financial data for interpretation, e.g. profit & loss statements?

- ☐ Yes ☐ No

Does your business sell its services/products internationally?

- ☐ Yes ☐ No

If no, do you sell:

- ☐ In specific states ☐ Within a region ☐ Nationally

Does your business have a business plan?

- ☐ Yes ☐ No

If yes, when was it written? \_\_\_\_\_ Is it up to date?

- ☐ Yes ☐ No

Does your business have a marketing plan?

- ☐ Yes ☐ No

If yes, when was it written? \_\_\_\_\_ Is it up to date?

- ☐ Yes ☐ No

Does your business employ staff other than you and/or your partner?

☐ Yes

☐ No

If yes, please rate your:

Employee retention

☐ Short

☐ Average

☐ Long

Employee engagement

☐ Low

☐ Average

☐ High

Does your business have workplace health and safety policies?

☐ Yes

☐ No

Does your business have documented systems and procedures?

☐ Yes

☐ No

What are the two main challenges for your business?

1.

2.

What are the two key things you wish to achieve with your business?

1.

2.

Do you have Key Performance Indicators for your business?

☐ Yes

☐ No

If yes, please list the top 3:

1.

2.

3.

Does your business have a website?

☐ Yes

☐ No

Does your business have a social media presence? (tick all that apply)

☐ Facebook

☐ Instagram

☐ Twitter

☐ YouTube

☐ LinkedIn

Does your business have an online business listing?

☐ Yes

☐ No

If yes, do you have favorable reviews?

☐ Yes

☐ No

Do the processes change in your business depending on seasonality, e.g. Peak versus Off-peak?

Can you clearly define your current target market for your business?

☐ Yes

☐ No

1 = Below your expectations

2 = Meets your expectations

3 = Exceeds your expectations

Business HealthFactor	What to Consider	Rating		
		Below	Meets	Exceeds
<b>Systems &amp; processes</b>	I use consistent systems and processes in my business	1	2	3
<b>Staff performance</b>	My staff are fulfilling their responsibilities	1	2	3
<b>Financial performance</b>	I consistently fulfill my financial commitments	1	2	3
<b>Billing, invoicing &amp; debtors</b>	My customers are meeting my payment terms	1	2	3
<b>Cash flow</b>	My cash flow is strong and can support the daily operation of the business	1	2	3
<b>Creditor payments</b>	I am meeting financial commitments to suppliers and vendors	1	2	3
<b>Work in progress</b>	I have solid orders on the books for future earnings	1	2	3
<b>Project management</b>	I know where all current projects are up to, in terms of scope, delivery	1	2	3
<b>Quality</b>	I actively measure the quality of what I produce/sell/provide before a complaint is received	1	2	3
<b>Client servicing</b>	I meet my clients' expectations by seeking feedback, and I keep track	1	2	3
<b>Organization &amp; scheduling</b>	I am in control of the day-to-day activities my business undertakes - tasks are planned, scheduled and prioritized.	1	2	3
<b>Risk management</b>	I can identify and address key risks that may dramatically impact business	1	2	3
<b>Staff culture</b>	The culture in my business is positive, open and an interactive team environment	1	2	3
<b>Sustainability &amp; Reward</b>	My business is growing and I get a decent remuneration as an owner	1	2	3
<b>Business planning</b>	I have a business plan and know where the business needs to be in the next 12 months and how that will be achieved	1	2	3
<b>Growth &amp; balance</b>	I have a good balance of working IN my business as well as ON my business (i.e. turning growth opportunities into a reality)	1	2	3
<b>Total Score</b>		.....		

## What your results mean

### 30 plus

Chances are your business has a sound health for the years ahead. You may want to consider strategic growth opportunities or other refinements to assist with your longer-term success.

### 20 – 30

Chances are you'll be experiencing some aches and pains, either internally (ie. delivery and performance, cash flow or financial) or from external factors. Consider seeking assistance from an advisor to explore some remedies.

### Below 20

Chances are it's time for some significant 'surgery'. A performance review or other such options, including restructure, turnaround plan or possible sale or divestment, may need to be considered.