

Company Name: (Optional)



SECTION 1 : Brand Strength

STATEMENT

SCORE
(1 - 5)

Customers can clearly explain what we do and why we are different from competitors.

We have a documented brand identity (mission, values, voice, visuals) that guides our decisions.

We do not compete on price; customers choose us for our specific expertise or niche.

Our branding is consistent across all touchpoints (emails, invoices, ads, uniforms..)

Our online presence (website, social media) accurately reflects our brand quality and personality.

SECTION 1 TOTAL

/25

SECTION 3 : Work Systems & Processes

STATEMENT

SCORE
(1 - 5)

Our core business processes are documented in writing or video (not just in someone's head).

A new employee can be trained using our documented systems without me teaching them everything.

We use checklists or Standard Operating Procedures (SOPs) to ensure consistency and reduce errors.

We consistently gather customer feedback and use it to improve our processes.

We use technology or software to automate repetitive tasks and reduce manual work

SECTION 3 TOTAL

/25

SECTION 5 : Financial Control

STATEMENT

SCORE
(1 - 5)

I review my Profit & Loss (P&L) statement at least monthly.

I know my Gross Profit Margin (Revenue minus direct costs) by heart.

I know my Cost of Acquiring a Customer (CAC) and Customer Lifetime Value (LTV).

We have a budget or financial forecast and track actual performance against it.

The business has a cash reserve for emergencies, and I take a consistent salary.

SECTION 5 TOTAL

/25

SECTION 2: Team & Company Structure

STATEMENT

SCORE
(1 - 5)

Every employee has a clear, written job description and knows their responsibilities.

There is a clear organizational chart (reporting lines) that everyone understands and follows.

If I were absent for two weeks, the company would run smoothly without me making daily decisions.

We have designated leaders or managers responsible for specific departments or outcomes.

We conduct regular performance reviews or check-ins to support employee growth.

SECTION 2 TOTAL

/25

SECTION 4: Marketing Strategy

STATEMENT

SCORE
(1 - 5)

We have a documented marketing plan for the next 12 months.

We know exactly who our "Ideal Customer" is and create messages specifically for them.

We have a predictable system for generating leads (referrals, SEO, ads, partnerships, etc.).

We have a process for nurturing leads and converting them into paying customers.

We track where our best customers come from and invest more in what works.

SECTION 4 TOTAL

/25

SCORING SUMMARY

SECTION

SCORE
/25

BRAND STRENGTH

TEAM & COMPANY STRUCTURE

WORK SYSTEMS & PROCESSES

MARKETING STRATEGY

FINANCIAL CONTROL

OVERALL HEALTH SCORE

/125