

Tools and templates



Complete our business health check

A business health check allows you to assess the strength of elements that are vital to your company's success. These range from fundamentals like cash flow management to your personal development as a leader.

Work through the list and use the prompt questions to rate each area of your business:

- 1:** Needs improvement
- 2:** Meets expectations
- 3:** Excels in this area

Business area	Health factor	Questions to ask	Rating (circle the score)
Finance	Cash flow	Does your business have enough cash to meet financial obligations and run effectively?	1 2 3
Finance	Financial performance	Think about your company's overall financial performance. Are you consistently meeting goals and projections?	1 2 3
Finance	Payments	Do you have a robust structure in place to ensure customers are paying on time?	1 2 3
People	Culture	Have you fostered a positive company culture that supports the health and wellbeing of your employees?	1 2 3
People	Training and development	Think about the training you offer to your workforce. Are you investing time and resources into upskilling staff?	1 2 3

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Business area	Health factor	Questions to ask	Rating (circle the score)
People	Communication	How strong is communication in your business? Is there an avenue for staff to give feedback to leadership?	1 2 3
People	Talent retention	How would you rate your staff retention? Are you doing enough to attract and retain talent in your business?	1 2 3
People	Target setting	Do you have an effective target setting process in place to keep staff motivated?	1 2 3
Leadership	Delegation	Do you feel comfortable with delegating tasks to free up your own time?	1 2 3
Leadership	Personal development	Do you know what your strengths and weaknesses are as a leader? Are you taking proactive steps to develop and improve?	1 2 3
Network	Supply chain	Do you have a strong, reliable supply chain? Have you taken action to mitigate potential disruptions?	1 2 3
Network	Peer support	Are you dedicating time to building your network and speaking to other business leaders?	1 2 3

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Business area	Health factor	Questions to ask	Rating (circle the score)
Processes	Efficiency	Think about your internal processes and areas that often cause problems or bottlenecks. How would you rate your efficiency?	1 2 3
Processes	Digital	Have you implemented technology to streamline key processes?	1 2 3
Processes	Organisation	Is your business organised? Do you have a clear system for staff to schedule tasks and ensure projects stay on track?	1 2 3
			Total score ___ / 45

Your results and next steps

20 or below

If you scored 20 or below, there will definitely be some areas you'll want to improve. Look back through the list to see which business areas you scored the lowest on to figure out where to start. However, if there are improvements to be made across the board, it's a good idea to get to work on the most business critical areas first – often finance.

Between 20 and 30

A score of between 20 and 30 shows that your business is in good shape overall. However, there are likely a few significant areas that need improvement. As above, it's advisable to start with the most business critical first, then turn to those that will have the biggest impact on your goals this year.

30 and above

Congratulations – your business is in good shape! You've likely got a good handle on cash flow, developed efficient processes and are working hard to develop and retain your best staff. But don't rest on your laurels – things can change fast so it's important to continually assess how your business could be stronger. Go back to any areas you scored two or below on and consider what you could change in order to excel.