



BUSINESS HEALTH CHECK

(Approx 10-15mins to complete)

Your Name _____

Your Business Name _____

Job title _____

Address _____

Email Address _____

Office Phone Number _____

Mobile Phone Number _____

Your Website Address _ www. _____

Today's Date _____/_____/_____

Background of business:

Industry _____

Revenue earned in last fiscal year _____

Profitability earned in last fiscal year _____

Number of business owners _____

Number of employees _____



Management Analysis

- | | | | |
|---|-------|---|----|
| 1. Is the business providing you with sufficient Income? | Yes | / | No |
| 2. If not, what % more income would you like? | _____ | | |
| 3. Do you work more than 40 hours a week? | Yes | / | No |
| 4. How many hours would you like to work? | _____ | | |
| 5. Do you take 5 or more weeks holiday a year? | Yes | / | No |
| 6. How much is your business worth? | _____ | | |
| 7. When do you hope to retire? | _____ | | |
| 8. How old will you be? | _____ | | |
| 9. Do you have a business plan? | Yes | / | No |
| 10. If yes, do you track your performance against the plan? | Yes | / | No |
| 11. Do you know your revenue break-even level? | Yes | / | No |
| 12. Do you have a cash flow plan which you monitor each month? | Yes | / | No |
| 13. Do you hold regular management meetings to review progress? | Yes | / | No |
| 14. What are your 3 biggest frustrations with your business? | _____ | | |
| | _____ | | |
| | _____ | | |
| | _____ | | |
| 15. Could you take a break next week at short notice without your business suffering as a result? | Yes | / | No |
| 16. Do you have a written operations manual incorporating performance Standards that the team must adhere to? | Yes | / | No |
| 17. If yes to the above, do you monitor team actual operations against the performance standards? | Yes | / | No |



Employee Analysis

- | | | | |
|---|-------|---|----|
| 1. Do you find it hard to retain your employees? | Yes | / | No |
| 2. Do all your team members receive regular training? | Yes | / | No |
| 3. Do you set each employee performance targets to meet? | Yes | / | No |
| 4. What do you do if your team fails to meet their targets? | _____ | | |
| 5. Does your team make important decisions in the business? | Yes | / | No |
| 6. Do you praise and reward your team members for excellent achievements? | Yes | / | No |
| 7. What is your main 'incentive' to make team members work harder? | _____ | | |
| _____ | | | |
| _____ | | | |
| _____ | | | |
| _____ | | | |
| 8. How often do you have team meetings? | _____ | | |
| 9. Do you have a prepared set agenda to discuss? | Yes | / | No |
| 10. Do you have a forum where the entire workforce gets together to discuss needs and frustrations? | Yes | / | No |
| 11. On a scale 1-10, how good is your team at delivering a good service? | _____ | | |
| 12. Do you think your salary bill is too high? | Yes | / | No |
| 13. Are you over staffed? | Yes | / | No |
| 14. Do you run appraisals every 6 months? | Yes | / | No |
| 15. Do you have a career management scheme? | Yes | / | No |
| 16. Do you have a prepared induction programme for new starters? | Yes | / | No |
| 17. Have all your team members signed a contract? | Yes | / | No |
| 18. Do you think you need to focus more on employee issues? | Yes | / | No |



8. We have a monitoring system to show us how we are meeting the needs of our customers.

Yes No

9. Our customers actively talk to our competitors.

Yes Never Sometimes Not thought about it I wouldn't know

10. Our 'vision' statement focuses on our customers and their needs.

Yes No

11. We spend more money on finding new customers than retaining existing customers.

Never Sometimes Usually Always Not Applicable

12. We would rather lose a sale with a valued client than to lose this customer to our competitors.

Never Sometimes Usually Always Not Applicable

13. When we lose a customer we sit down with them and conduct an 'exit interview'.

Never Sometimes Usually Always Not Applicable

14. What % of your customer base have you lost in the last year? _____

15. What % of your customer base have you obtained in the last year? _____

16. We actively know the difference between 'goods' and 'services' marketing which helps us to get the best return on our marketing.

Yes No Not thought about it before

17. Our team always seeks to understand our customers before we service them.

Never Sometimes Usually Always Not Applicable



18. We have had more than 20% of our existing customers tell us that we are extremely proactive in our service delivery.

Never Sometimes Usually Always Not Applicable

19. We always speak in a clear, coherent manner, without using any technical jargon that the customer does not understand.

Never Sometimes Usually Always Not Applicable

20. Our Customer Service Strategy is documented and is well known to every team member in our business.

Never Sometimes Usually Always Not Applicable

21. Are you aware that research undertaken has shown that typically:

As much as 95% of unsatisfied customers do not bother to complain Yes No Not thought about it

10 people will hear of one of your dissatisfied customers complaints. Yes No Not thought about it

Each of these people will tell another 5 people. Yes No Not thought about it

68% of those customers who leave you perceive that you just don't value or care about them? Yes No Not thought about it

Improving your customer retention rate by 20% has the same effect as cutting costs by 10%? Yes No Not thought about it

It costs as much as 10% more to obtain a new customer than to retain an existing customer. Yes No Not thought

95% of customers who perceive that their complaints are dealt with quickly will do business with the firm again? Yes No Not thought about it

Those customers whose complaints are resolved quickly will tell 5 people, thereby, it can turn into a positive marketing tool. Yes No Not thought about it

It takes 12 positive experiences to overcome 1 negative experience Yes No Not thought about it



Product/Service Analysis

1. Briefly describe your products/services?

2. Do you monitor the profitability of each product/service on a regular basis? Yes / No

3. If yes to the above – do you change your portfolio of products/services as a result? Yes / No

4. Is your marketing effective for your products/services? Yes / No

5. What forms of media do you use for your marketing?

6. Do you track your performance regularly for each type of media used? Yes / No

7. Is your team creating excellent results at converting customers over the phone? Yes / No

8. Does your website bring in new business for you? Yes / No

9. What other methods do you use to obtain new business? _____