RESILIENT LIFE MANAGEMENT

THE BUSINESS GROWTH LEAK AUDIT

Find the leak. Build the advantage.

A practical self-assessment for established businesses

STRATEGY • SYSTEMS • IMPLEMENTATION

How to use this audit

Review each area honestly. Mark each item as **Working**, **Needs attention** or **Unknown**. You are looking for the few points where friction may affect growth, customer experience or operating capacity.

This checklist is a diagnostic tool, not a financial audit or a guarantee of results. Internal performance data is needed to confirm the size and cause of an opportunity.

01 | Lead generation & visibility

Mark one status for each review point. If you cannot answer confidently, mark Unknown.

Review point	Working	Needs attention	Unknown
Can the right customers quickly understand what the business offers?	■	■	■
Is there a clear path from the website or profile to an inquiry, booking or purchase?	■	■	■
Are services, locations and ideal customers easy to identify?	■	■	■
Are search listings, business profiles and referral paths accurate and current?	■	■	■
Can you identify which channels generate qualified inquiries?	■	■	■

02 | Website & conversion

Mark one status for each review point. If you cannot answer confidently, mark Unknown.

Review point	Working	Needs attention	Unknown
Does the first screen explain who the business helps and what to do next?	■	■	■
Are calls to action visible on desktop and mobile?	■	■	■
Do forms ask only for information needed to respond?	■	■	■
Are service pages specific enough to answer common buyer questions?	■	■	■
Are there broken links, slow pages or confusing steps?	■	■	■

03 | Lead capture & response

Mark one status for each review point. If you cannot answer confidently, mark Unknown.

Review point	Working	Needs attention	Unknown
Does every inquiry reach a monitored inbox or CRM?	■	■	■
Is each lead assigned to someone responsible for the next action?	■	■	■
Are response expectations clear and consistently met?	■	■	■
Are missed calls, abandoned forms and after-hours inquiries handled?	■	■	■
Can the business see which inquiries are still waiting?	■	■	■

04 | Follow-up & sales process

Mark one status for each review point. If you cannot answer confidently, mark Unknown.

Review point	Working	Needs attention	Unknown
Is there a consistent follow-up process for undecided prospects?	■	■	■
Are follow-up messages useful and relevant rather than repetitive pressure?	■	■	■
Can the team see the stage and next step for every opportunity?	■	■	■

Are proposals and estimates tracked through decision and close?	■	■	■
Are common objections and lost-sale reasons recorded?	■	■	■

05 | Offer, pricing & customer journey

Mark one status for each review point. If you cannot answer confidently, mark Unknown.

Review point	Working	Needs attention	Unknown
Are packages and service options easy to compare?	■	■	■
Is the value of each offer explained in customer language?	■	■	■
Are inclusions and exclusions clear?	■	■	■
Are booking, onboarding and payment steps straightforward?	■	■	■
Does the experience set clear expectations before and after purchase?	■	■	■

06 | Retention & customer experience

Mark one status for each review point. If you cannot answer confidently, mark Unknown.

Review point	Working	Needs attention	Unknown
Is there a process for checking in after delivery?	■	■	■
Are reviews and referrals requested at appropriate moments?	■	■	■
Can returning customers easily re-engage?	■	■	■
Are repeat-purchase or renewal opportunities tracked?	■	■	■
Are complaints and recurring friction patterns reviewed?	■	■	■

07 | Operations & handoffs

Mark one status for each review point. If you cannot answer confidently, mark Unknown.

Review point	Working	Needs attention	Unknown
Are repetitive tasks documented?	■	■	■
Are responsibilities clear when a lead or customer moves between people?	■	■	■
Is the same information entered into multiple systems?	■	■	■
Can the team locate current customer and project information quickly?	■	■	■
Are delays, rework and avoidable handoffs visible?	■	■	■

08 | Automation, AI & reporting

Mark one status for each review point. If you cannot answer confidently, mark Unknown.

Review point	Working	Needs attention	Unknown

Are confirmations and routine reminders automated where appropriate?	■	■	■
Are manual tasks that could be standardized identified?	■	■	■
Are AI tools used for defined workflows rather than novelty?	■	■	■
Are key metrics reviewed regularly?	■	■	■
Can management distinguish activity from actual outcomes?	■	■	■

Turn observations into priorities

Do not attempt to fix everything at once. Choose the opportunities most likely to improve the customer experience or remove an operating constraint, then validate them with real business data.

Opportunity	Evidence	Impact	Effort	Next action / owner

A simple prioritization rule

High impact + manageable effort: investigate first. **High impact + high effort:** scope carefully and validate the business case. **Low impact:** do not let cosmetic changes distract from material issues. **Unknown:** gather evidence before spending.

Your first 30-day focus

1. Select one issue to investigate.
2. Record the current process and available baseline data.
3. Define what a better outcome would look like.
4. Assign an owner and a realistic next action.
5. Review what changed before expanding the project.

Want a second set of eyes?
Resilient Life Management helps businesses assess opportunities and implement practical improvements across strategy, digital infrastructure, customer acquisition and operations.

Contact: reslifemgmt@gmail.com
Find the leak. Build the advantage.