



Your Business Health Review Checklist



CHECKLIST



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Checklist For: Business Health Review

Strategy:

- ☐ Do you have a Clear Vision & Mission?
- ☐ Are your goals aligned with your company's vision and mission?
- ☐ Have you defined clear short-term and long-term goals for your business?
- ☐ Do you have a Year Plan?
- ☐ Have you conducted a SWOT analysis?
- ☐ Do you regularly review and update your strategic plan?
- ☐ Do you know your issues and risk?
- ☐ Do you have a Scorecard?
- ☐ Are you tracking key performance indicators (KPIs) to measure progress towards your goals?





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Culture:

- ☐ Do you have a clear structure and communicated to all employees?
- ☐ Are roles and responsibilities clearly defined within your team?
- ☐ All employees are in line with Company Values?
- ☐ Do you encourage open communication and feedback among team members?
- ☐ Are you fostering a positive company culture that promotes innovation and collaboration?
- ☐ Website domain is available, ideally the dot com
- ☐ Do you provide opportunities for leadership development?
- ☐ Do you actively recognize and reward achievements within your team?
- ☐ Will remain relevant as my business evolves





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Process:

- ☐ Have you identified your core process?
- ☐ Have everyone in your company are properly train for their role?
- ☐ Do you have a Marketing & Sales Plan?
- ☐ Do you have an Operational Plan?
- ☐ Are you leveraging technology and digital platforms?
- ☐ Do you have a system in place to share information and save all data?
- ☐ Are your business processes documented and standardized for efficiency?
- ☐ Do you regularly review and optimize your processes to improve productivity?
- ☐ Do you have a Business Year Plan, and Quarter review implemented?





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Financial:

- ☐ Do you have a Budget in Place?
- ☐ Do you have a system for tracking key financial metrics and performance indicators?
- ☐ Do you have a P&L?
- ☐ Are you regularly monitoring your cash flow and budget?
- ☐ Have you identified areas for cost optimization and efficiency improvement?
- ☐ Do you have a contingency plan for handling financial setbacks or emergencies?
- ☐ Do you conduct regular financial audits to ensure accuracy and compliance?
- ☐ Do you use ROI for all investments?
- ☐ Do you have an Investment Plan?





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Business Development:

- ☐ Are you consistently seeking new opportunities for business growth?
- ☐ Have you conducted market research to validate your business idea?
- ☐ Do you have a clear understanding of your target market and customer needs?
- ☐ Do you have a comprehensive marketing strategy to reach your target audience?
- ☐ Are you continuously exploring new markets and expansion opportunities?
- ☐ Have you registered your business and obtained necessary licenses and permits?
- ☐ Do you monitor industry trends and adapt your business strategies accordingly?
- ☐ Have you established partnerships or collaborations to enhance your business reach?
- ☐ Is your company fully digital ?





Thank You!

I hope you found this checklist helpful.

I trust it provided valuable insights for enhancing your business's vitality.

We're always eager to hear about your experiences and how our resources have made a difference.

Don't hesitate to share your thoughts or discuss further via the contact details below.

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