



Your Freedom & Profit Worksheet for a Healthy Business

There are **6 key indicators of business health** that will give you a rock solid picture of how you are doing.

Financial Metrics: Are You Profitable?

If your business is not making money and showing a profit, you won't be in business for long. It is simply not sustainable to lose money year after year. It might make a good hobby, but not viable business.

	Yes	No
Do you track your income?	<input type="checkbox"/>	<input type="checkbox"/>
Do you track your expenses?	<input type="checkbox"/>	<input type="checkbox"/>
Do you know if you are profitable (amount of income left after expenses)?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have sufficient cash flow when you need it?	<input type="checkbox"/>	<input type="checkbox"/>
How often do you track/review your numbers (circle one)?	Daily, Weekly, Monthly	Quarterly, Yearly



Client & Employee Satisfaction: Are You Delivering?

Without happy customers, you won't stay in business very long. Without happy employees your customers will not have the experience you desire. Whether you have a handful of clients or hundreds of clients, an important measure of business health is how satisfied they are.

	Yes	No
Do you consistently collect testimonials/recommendations?	<input type="checkbox"/>	<input type="checkbox"/>
Do you regularly share testimonials with prospects/in your marketing?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a process to nurture current clients?	<input type="checkbox"/>	<input type="checkbox"/>
On a scale of 1 (miserable automatons) to 10 (fully empowered and love the business as his/her own), how empowered, engaged, and happy are your employees?	_____	

Prospect Process & Sales Cycle: Do Leads Convert to Customers?

Business is built on relationships. There is no such thing as a "quick sale". For most service-based businesses the sales cycle can be moderate to long. That means you must always be generating quality leads, building relationships, and following up with prospects.

	Yes	No
Do you track prospects?	<input type="checkbox"/>	<input type="checkbox"/>
Do you follow-up with prospects (and track your date/number of follow ups)?	<input type="checkbox"/>	<input type="checkbox"/>
Do you know your prospect to client conversion rate?	<input type="checkbox"/>	<input type="checkbox"/>
Are you happy with your current conversion rate?	<input type="checkbox"/>	<input type="checkbox"/>



Marketing: What's Working; What's Not?

Without effective marketing, no one will know you even exist. If the only people that know you are in business are your partner and your cat, you won't get too many new clients! There are hundreds if not thousands of ways you *could* market your business. However, you can only choose a finite number of marketing activities to execute consistently.

	Yes	No
Do you conduct marketing activities on a regular consistent basis?	<input type="checkbox"/>	<input type="checkbox"/>
Do you know which marketing activities are effective and provide you a return?	<input type="checkbox"/>	<input type="checkbox"/>
Are you happy with the effectiveness of your current marketing plan & execution?	<input type="checkbox"/>	<input type="checkbox"/>

Systems & Technology: Creating Leverage

Technology exists for one purpose only: to enable your business. If the technologies you use in your business are not creating the leverage and ease they are meant to, your business will struggle to thrive. Think of this part of your business health like a limp. If something is "off", you compensate for it. By compensating for it, you throw something else "off". That is why when you injure a foot, your back, hip, shoulder, and everything else starts to hurt. Same thing holds true in your business. If your technology and processes are not optimized, it's like limping along while carrying extra weight. You're working harder than you need to and not operating as efficiently as you could. At some point all this compensating will lead to break downs and dropped balls.

	Yes	No
Is your website up to date?	<input type="checkbox"/>	<input type="checkbox"/>
Does your website bring you consistent leads?	<input type="checkbox"/>	<input type="checkbox"/>
Can you go on vacation & will your business run smoothly in your absence?	<input type="checkbox"/>	<input type="checkbox"/>
On a scale of 1 (cripples me) to 10 (makes life a breeze), how do you feel about the technology you use in your business?	_____	
On a scale of 1 (what systems?) to 10 (everything has a system and is documented), how would you rate your business systems, processes, and procedures?	_____	



Personal Life & Happiness: Are You Succeeding on Your Own Terms?

No business health checkup would be complete without tending to the hub of all your business operations: YOU. The life plan comes before the business plan.

So how are you executing on your life plan?

	Yes	No
Can you disconnect from your business when you take time off so you can be fully present to enjoy, rest, and renew yourself?	<input type="checkbox"/>	<input type="checkbox"/>

Do you feel like your business contributes satisfactorily to your life/household?	<input type="checkbox"/>	<input type="checkbox"/>
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On a scale of 1 (let me jump out a window) to 10 (beyond my wildest dreams), how do you feel about the way your business supports your life? _____

On a scale of 1 (headed for disaster) to 10 (fulfilling & connected), how would you rate your personal relationships? _____

On a scale of 1 (a train wreck) to 10 (thriving,, how would you rate your personal well-being and health (physical, mental, spiritual, emotional)? _____

How to Use This Information

It takes courage to be honest and take the time to reflect on the health of your business. There is no such thing as a “perfect score” on this checkup. Businesses grow and evolve and this checkup is a useful tool to employ *at least annually*.

What’s Next?

It’s okay if you feel upset or concerned about what this checklist reveals. The important thing is that you now see much more clearly and we can make a plan for more freedom and profit for you!

Call me 267-382-0568 or email paula@thepaulagcompany.com to set up a time for a strategy session at a special rate.

No cookie-cutter nonsense here. Simply customized results for you.

Who is Paula G?

Paula Gregorowicz owner of The Paula G. Company LLC, helps business owners take charge of their time, productivity, and technology and helps them build authentic, sustainable businesses while having plenty of time and space for a life they love.

The work Paula shares with others is the essence of her more than twenty years experience and education: from BS in Accounting to 20 years in corporate America to entrepreneur and business owner, spiritual and coach training, and eclectic life experiences.

She is a formally trained coach, published writer and passionate photographer, has written many articles for online and print publications and her book *Open to Your Intuitive Intelligence: Reflections on Nature and Wisdom* released in September 2011.

Great stuff not only gets started with Paula, it gets finished!

Learn more about her unique approach of practical action and inner awareness at <http://www.thepaulagcompany.com>



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Now, Take Action

Getting into action on what you learned is the most important thing you can do next. **Call me 267-382-0568 or email paula@thepaulagcompany.com to set up a time for a strategy session at a special rate.**

No pressure and no strings attached. Simply practical solutions with a dose of humor.