



Your Healthy Business Worksheet

It can be easy to go along day to day in your business and never stop to truly take stock of how you are *really* doing. With the million and one things that fall on your plate as the chief everything officer in your small business, it might feel like you don't have time to stop and take the pulse of your business.

Yet the heart of your business is yearning for you to check in. You don't just want your business to survive, you want it to thrive so you can do good work in the world and have a life you love.

How to Know if Your Business is Healthy

You might be wondering, how do I even know how healthy (or not) my business is? While the feeling or vibe you might have about what is happening in your business is an important indicator, it is only part of the story. As an entrepreneur you have an awful lot of emotion and meaning wrapped up into your businesses (we all do). You are naturally optimistic and hopeful. These are great strengths to have, but they can actually get in the way of getting an accurate reading on the pulse of your business. That is why a business health checkup is the best thing you can do to get a complete and accurate picture.

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

1. Financial Metrics: Are You Profitable?
2. Client Satisfaction: Are You Delivering?
3. Prospect Process & Sales Cycle: Do Leads Convert to Customers?
4. Marketing: What's Working; What's Not?
5. Systems & Technology: Creating Leverage
6. Personal Life & Happiness: Are You Succeeding on Your Own Terms?

Let us walk through each one.



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 Satisfaction: Are You Delivering?

Without happy customers, you won't stay in business very long. 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 in place to nurture your current clients?	<input type="checkbox"/>	<input type="checkbox"/>



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 systems (both process and technology) 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 consist 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"/>

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?

As business owners we are too close to what's happening within our business to be objective. Not to mention, you are already plenty busy, right? It can often feel overwhelming or even impossible to find the time to address these 6 areas of business health.



The best way to do that is to delve deeper into these 6 key indicators of business health.

That is why you don't have to do it alone! This business health checkup includes one-on-one support customized just for you. Together we will identify the most important actions to take and then I will help you get them done.

Call me 267-382-0568 or email paula@thepaulagcompany.com to set up a time for a strategy session at a special rate of \$97. No cookie-cutter nonsense here. Simply customized results for you.