



BUSINESS PERFORMANCE BENCHMARK REPORT

Prepared for
ABC Fabrications Pty Ltd



Prepared by
Consultant: David Green
Company: Whiteboard Business Consulting Services
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Overview

Taking the time to reflect on the various aspects of your business is a crucial step toward achieving long-term success and positioning the business for future growth, increasing shareholder returns or increasing Company value in preparation for a future exit strategy or Company sale.

This is a sample business performance report produced for *ABC Fabrications Pty Ltd* demonstrating how Whiteboard Business Consulting services can provide your company with a 360 degree analysis of your business to identify specific areas for improvement and assist you in developing and implementing priority action plans.

How Whiteboard Business Consulting Services can help you

We work with our clients to complete an initial high level overview of their business followed by completion of a detailed Company questionnaire comprising several major categories, each representing a critical facet of your business. These categories include Sales & Marketing, Strategy & Planning, Customer Relations, Financial Management, People Management, Compliance, and Warning Signs. Each category is carefully crafted to cover essential aspects of running a successful business, ensuring that no area is overlooked.

We can then assist business owners with the development of strategic planning and implementation oversight to ensure the defined targets & objectives are achieved.

Our advisory firm specializes in helping businesses like yours navigate business improvement challenges and develop long term strategic planning. As a proud member of the Institute of Advisors, an internationally recognized organization that sets the benchmark for advisory standards, we bring a wealth of knowledge and expertise to our clients. Our affiliation with the Institute of Advisors ensures that we adhere to the highest professional standards.

This report has been generated based on assessment criteria developed by our advisor network around the world.

We look forward to supporting you on your business improvement journey.

David Green MBA, Grad.Dip. Corp. Governance, CPBA, AIBB, MAICD, GIA(Aff)

M: +61(0) 410 851018

E: davidgr@whiteboardconsulting.com.au

W: www.whiteboardconsulting.com.au



UNDERSTANDING YOUR REPORT AND NEXT STEPS

This report provides a benchmark of your firm's current performance, identifying key strengths and opportunities for improvement. To help you prioritize actions, each response has been evaluated and converted into a percentage scale with a corresponding colour code. These indicators make it easier to focus on areas that will have the greatest impact on your firm's value and readiness for sale.

- **A-Grade and B-Grade (83% and above):** Scores of 5 or 6 signify excellent performance, likely exceeding industry standards. Maintain these strengths as a foundation for further growth.
- **C-Grade (67% to 82%):** A score of 4 reflects solid but not optimal performance. These areas offer room for improvement and should be targeted to progress toward higher-grade company.
- **D-Grade (66% and below):** Scores of 3 or lower indicate significant gaps that require immediate attention. These areas represent the most critical opportunities to drive growth and reduce risk.



Any questions that did not apply to your business have been excluded from your overall score calculation.

Score	Percentage		Colour code	Grade
1	0% +	Fail		D-Grade
2	33% +	Poor		D-Grade
3	50% +	Fair		D-Grade
4	67% +	Good		C-Grade
5	83% +	Excellent		B-Grade
6	90% +	Excellent (Outstanding)		A-Grade

By focusing on the areas highlighted in **red** and **yellow**, you can address the most significant gaps and build on existing strengths. This strategic approach will help improve your overall grade, increase your firm's valuation multiple, and better position your business for a successful sale.

Developing an action plan

This report includes an action plan with items marked in green, yellow, or red to indicate priority. Here's how to approach it:

1. **Review:** Focus first on areas of the business that have been marked as red and yellow areas, as these are the most critical for improvement.
2. **Prioritize:** Decide which actions require your direct involvement and which can be delegated to your team.
3. **Set Up a 90-Day Action Plan:** Using a 90-day plan allows you to tackle high-priority areas in focused, manageable steps.

YOUR BUSINESS SNAPSHOT



YOUR ACTUAL SCORE
43%

Completing this diagnostic questionnaire is just the first step in a continuous journey of business improvement.

By reviewing the key areas of Sales & Marketing, Strategy & Planning, Customer Relations, Financial Management, People Management, Compliance, and Warning Signs, you gain a comprehensive understanding of where your business currently stands and what areas require attention.

It's important to take the insights gained from this assessment and develop an action plan that addresses any weaknesses and builds on your strengths. A well-thought-out plan will help you achieve your business goals, navigate challenges, and capitalize on opportunities in the marketplace. Remember, the success of your business is not just about working harder but also about working smarter, with a clear strategy and a proactive approach to improvement.

We encourage you to take the next steps in your business journey with confidence and a renewed sense of purpose.

Medium Risk Areas



Financial Audit
Compliance Audit
Warning Sign Audit

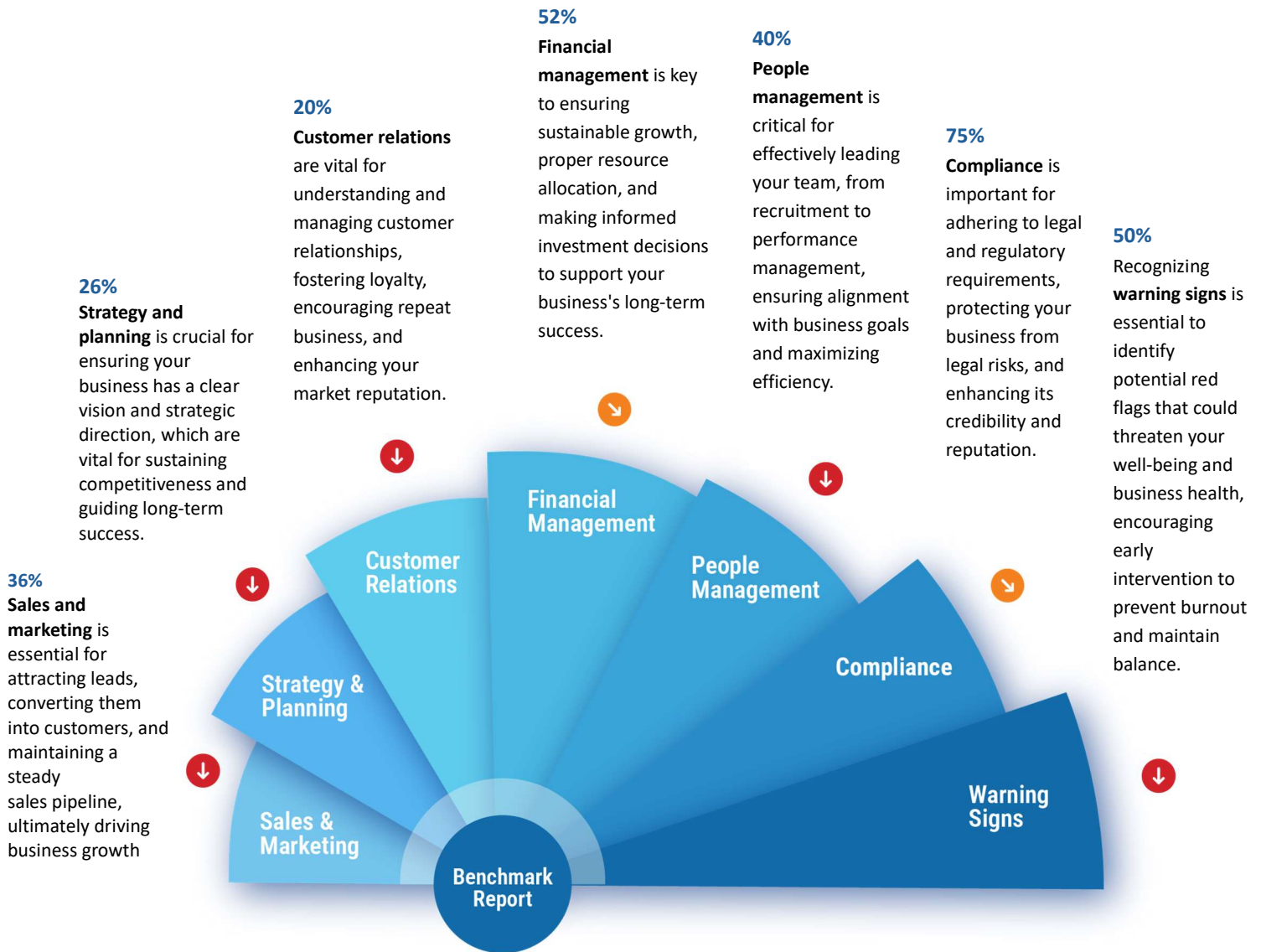
High Risk Areas



Sales & Marketing Audit
Strategy & Planning Audit
Customer Audit
People Audit

BUSINESS PERFORMANCE BENCHMARK SCORECARD

The assessment reviewed your business in which you scored 43%. This can be broken down into the following key areas.



SALES & MARKETING



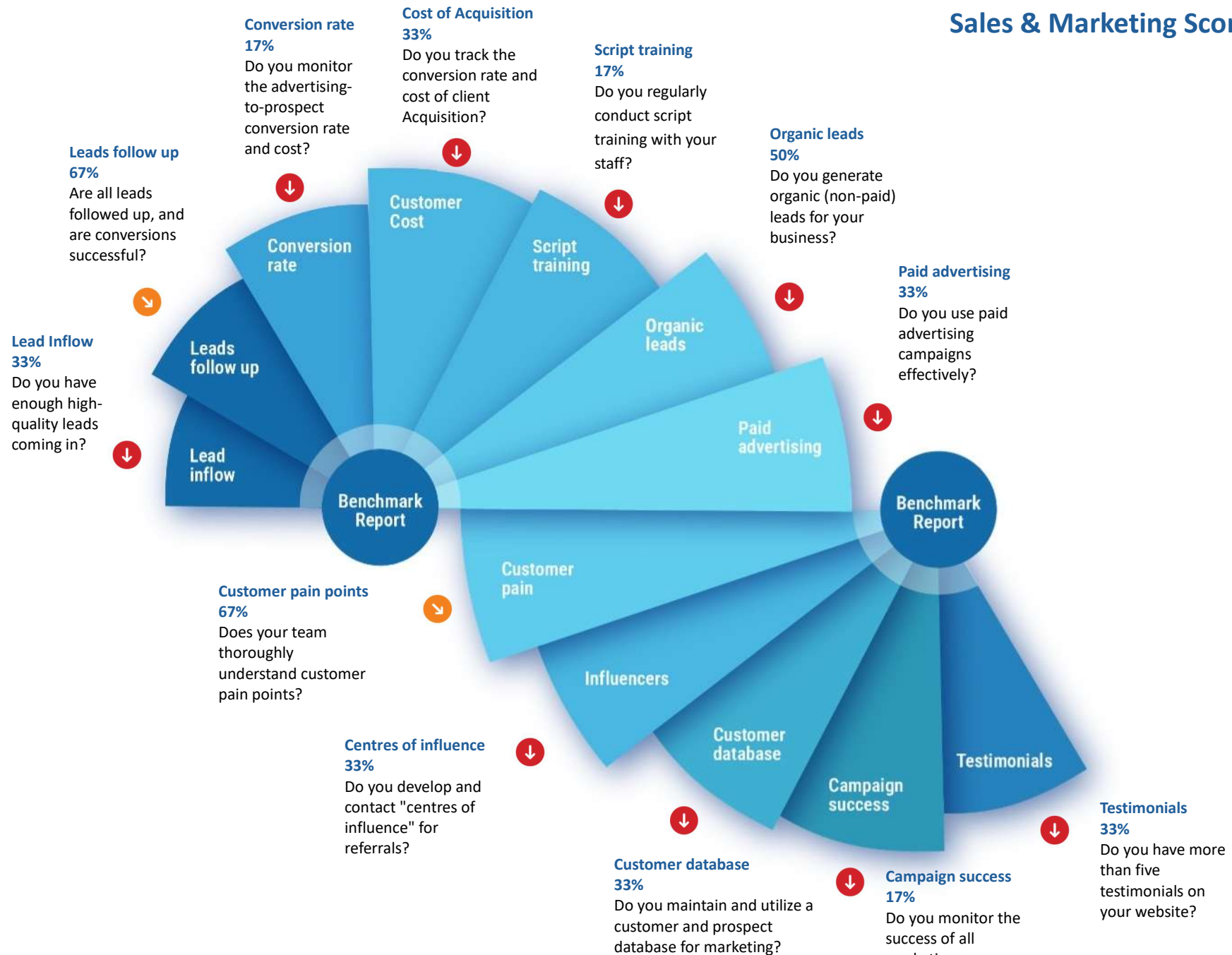
Your Sales & Marketing Score
36%

The Sales & Marketing section focuses on your ability to generate leads, convert them into customers, and maintain a healthy sales pipeline. You scored 36% in this area.

In today's competitive marketplace, understanding your customer's needs and effectively communicating your value proposition is paramount. The questions in this category assess how well your marketing efforts align with your sales processes, whether you're leveraging both paid and organic strategies, and how effectively you're tracking the performance of these activities.

By reviewing this area, you can identify strategies to improve lead generation, enhance customer acquisition, and optimize your marketing spend.

Sales & Marketing Scorecard



STRATEGY & PLANNING

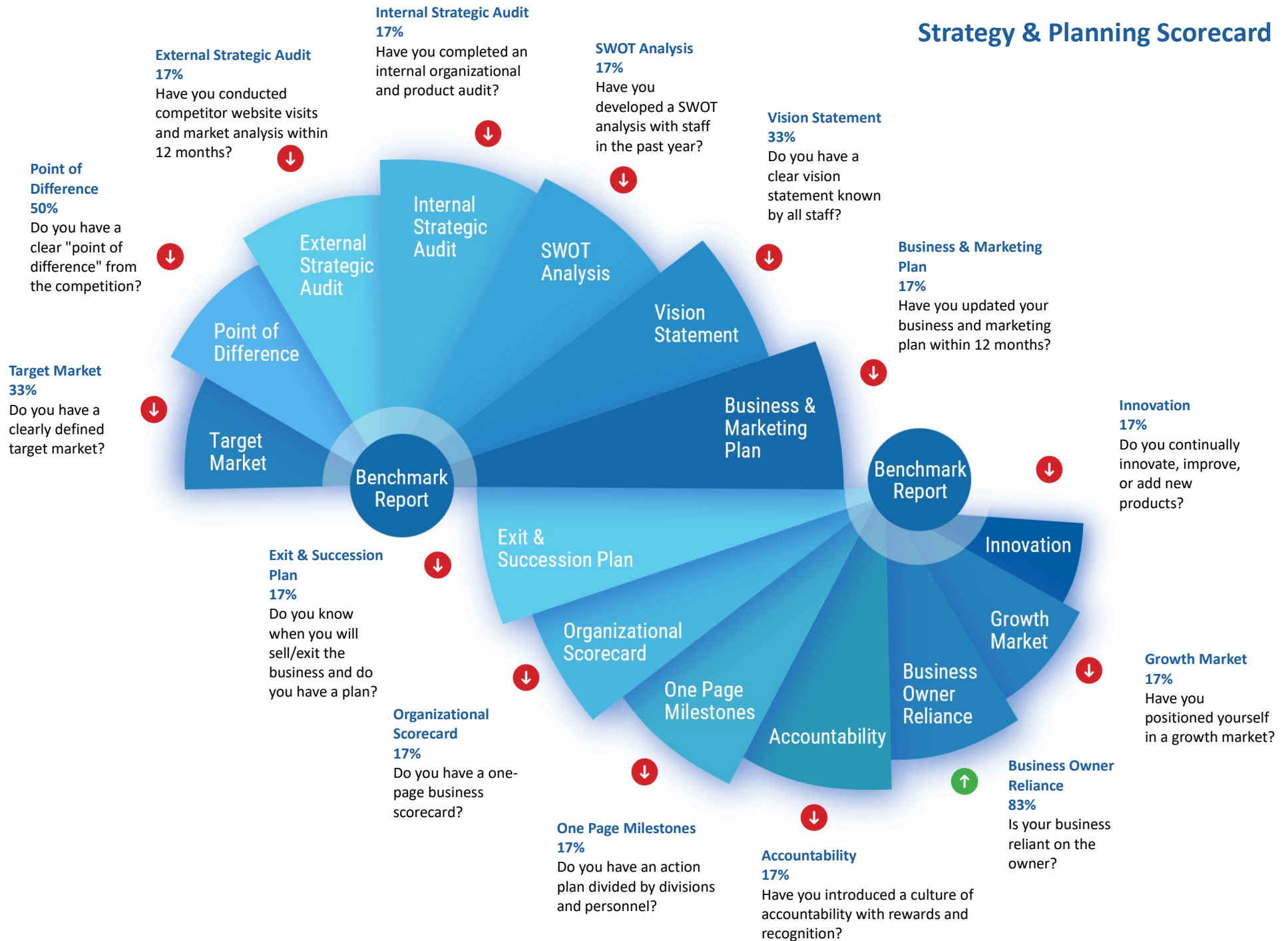


Your Strategy & Planning Score
26%

The Strategy & Planning section addresses the importance of having a clear direction and a solid plan for your business. Without a well-defined strategy, even the most promising businesses can lose their way. You scored 1 in this section

The questions in this category help you evaluate whether you have a clear vision and mission, if your business has a unique competitive advantage, and whether you've conducted the necessary market and internal audits to stay ahead of the curve. Strategic planning is not a one-time task; it requires regular updates and adjustments to respond to changing market conditions and business objectives.

Strategy & Planning Scorecard



CUSTOMER RELATIONS



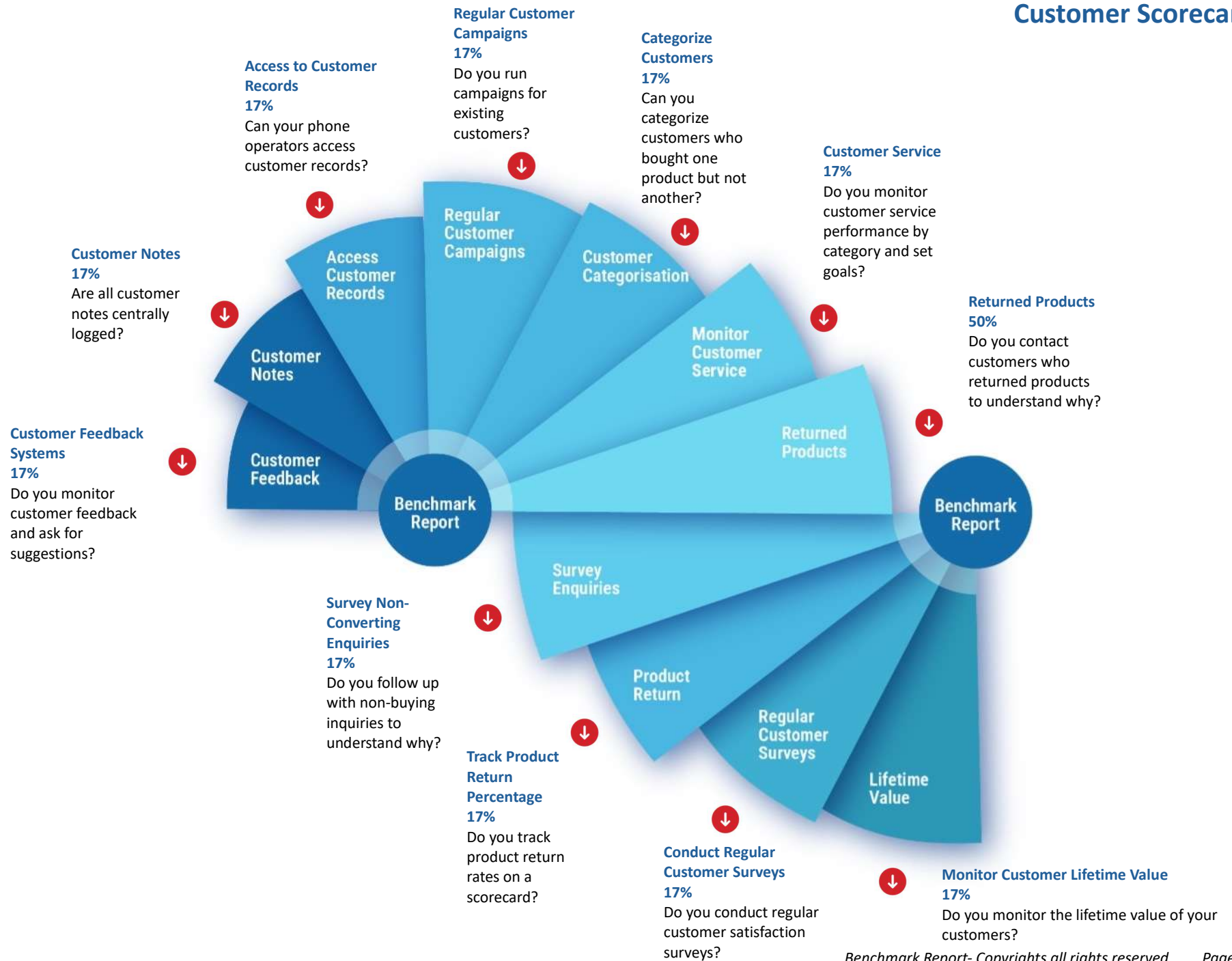
Your Customer Score
20%

Customer relations is the cornerstone of any successful business. You scored 20% in this section

The Customer Relations section focuses on how well you understand your customers, how effectively you respond to their needs, and how you manage relationships with them. Questions in this category examine whether you are actively seeking customer feedback, tracking customer interactions, and maintaining a database that allows you to personalize and enhance the customer experience.

Strong customer relations lead to repeat business, referrals, and a strong reputation in the marketplace.

Customer Scorecard



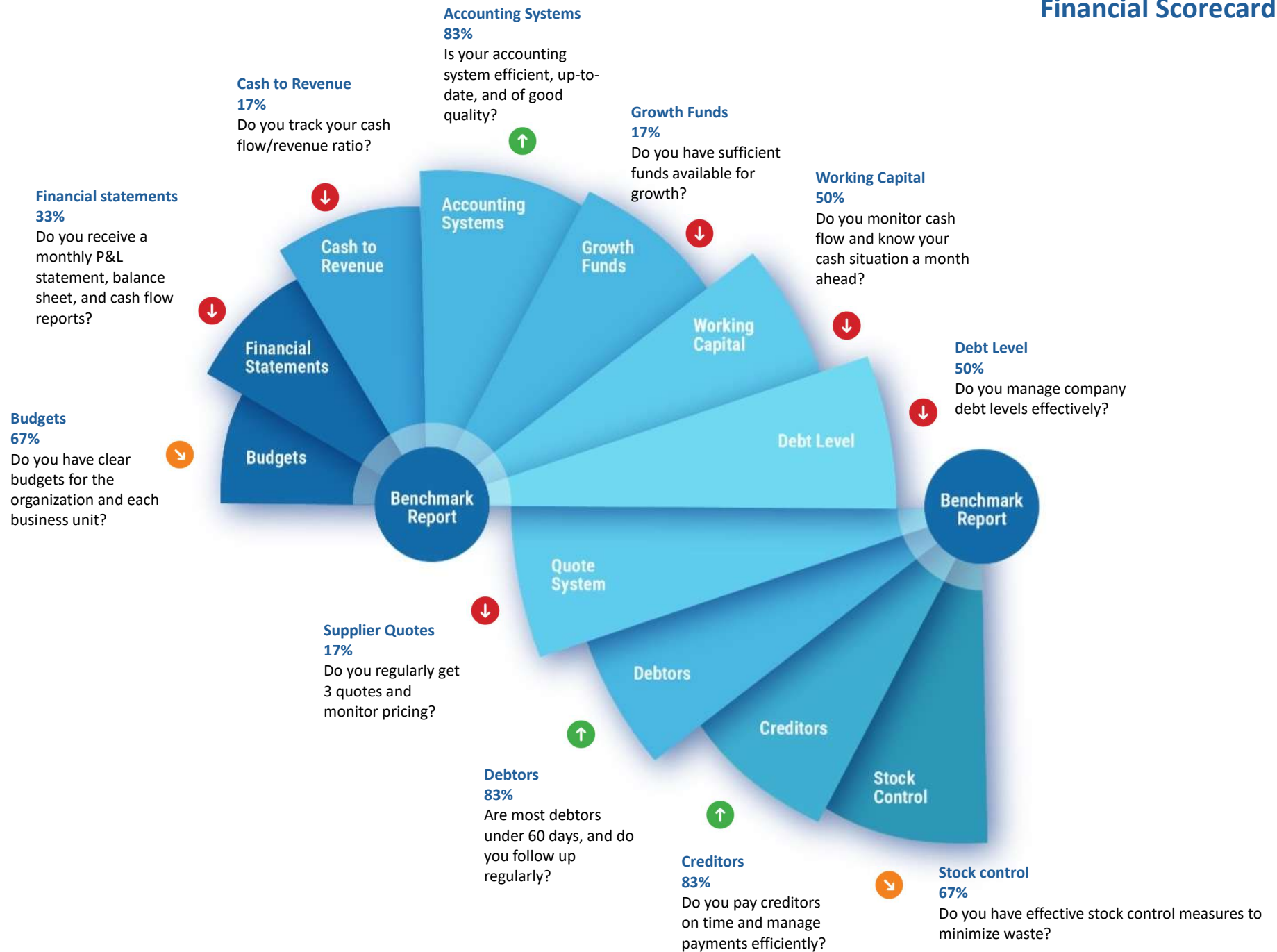
FINANCIAL MANAGEMENT



Your Financial Management Score
52%

Effective financial management is essential for the sustainability and growth of your business. You scored 52% in this section

The Financial Management section examines your budgeting practices, cash flow management, debt levels, and overall financial health. Questions in this category help identify areas where you might be overspending, underutilizing resources, or not fully understanding your financial position. Sound financial management allows you to make informed decisions, invest in growth opportunities, and avoid potential pitfalls that could jeopardize your business.



PEOPLE MANAGEMENT

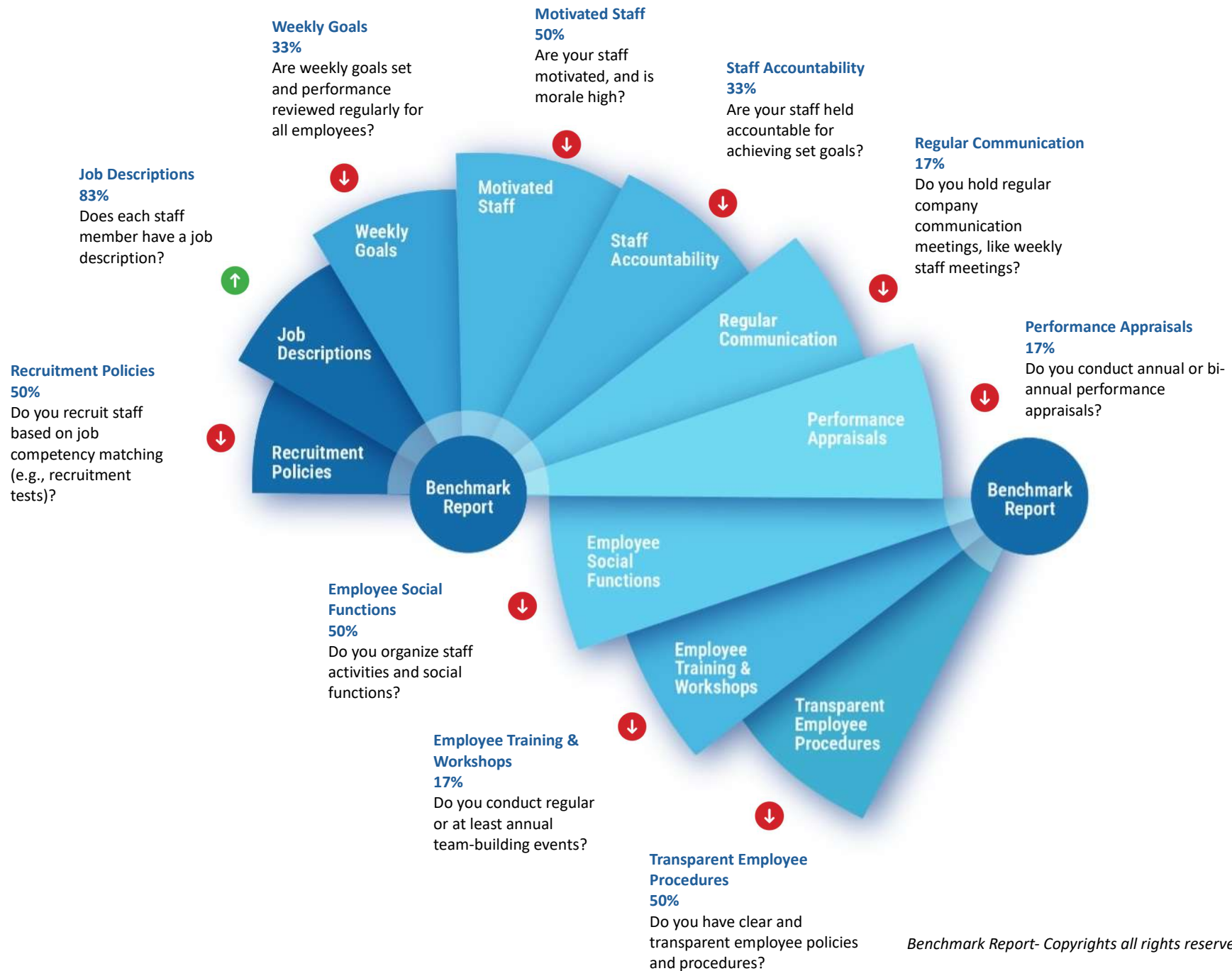


Your People Management Score
40%

Your employees are one of your most valuable assets. The People Management section evaluates how well you are managing your team, from recruitment and training to performance management and employee satisfaction.

You scored 40% in this section.

Questions in this category assess whether you have clear job descriptions, regular performance reviews, and a motivated workforce. Effective people management ensures that your team is aligned with your business goals and is working efficiently to achieve them.



COMPLIANCE STRATEGY

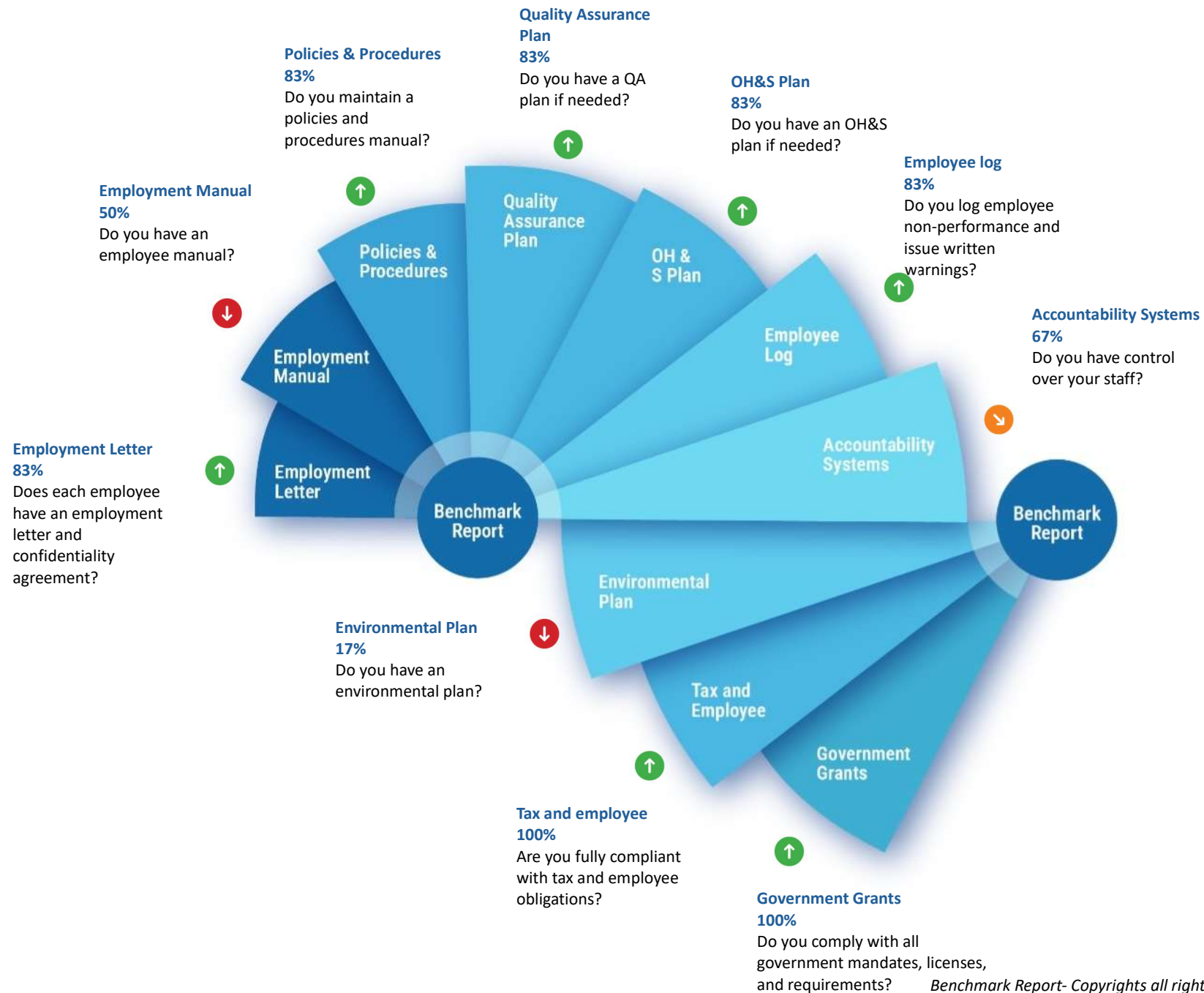


Your Compliance Strategy Score
75%

Compliance is often seen as a burden, but it’s a critical part of running a business. You scored 75% in this section.

The Compliance section reviews whether your business is adhering to all relevant laws and regulations, including employment laws, tax obligations, and industry-specific requirements. Questions in this category help ensure that you have the necessary documentation, policies, and procedures in place to avoid legal issues and penalties. Staying compliant not only protects your business but also enhances its reputation and credibility.

Compliance Scorecard



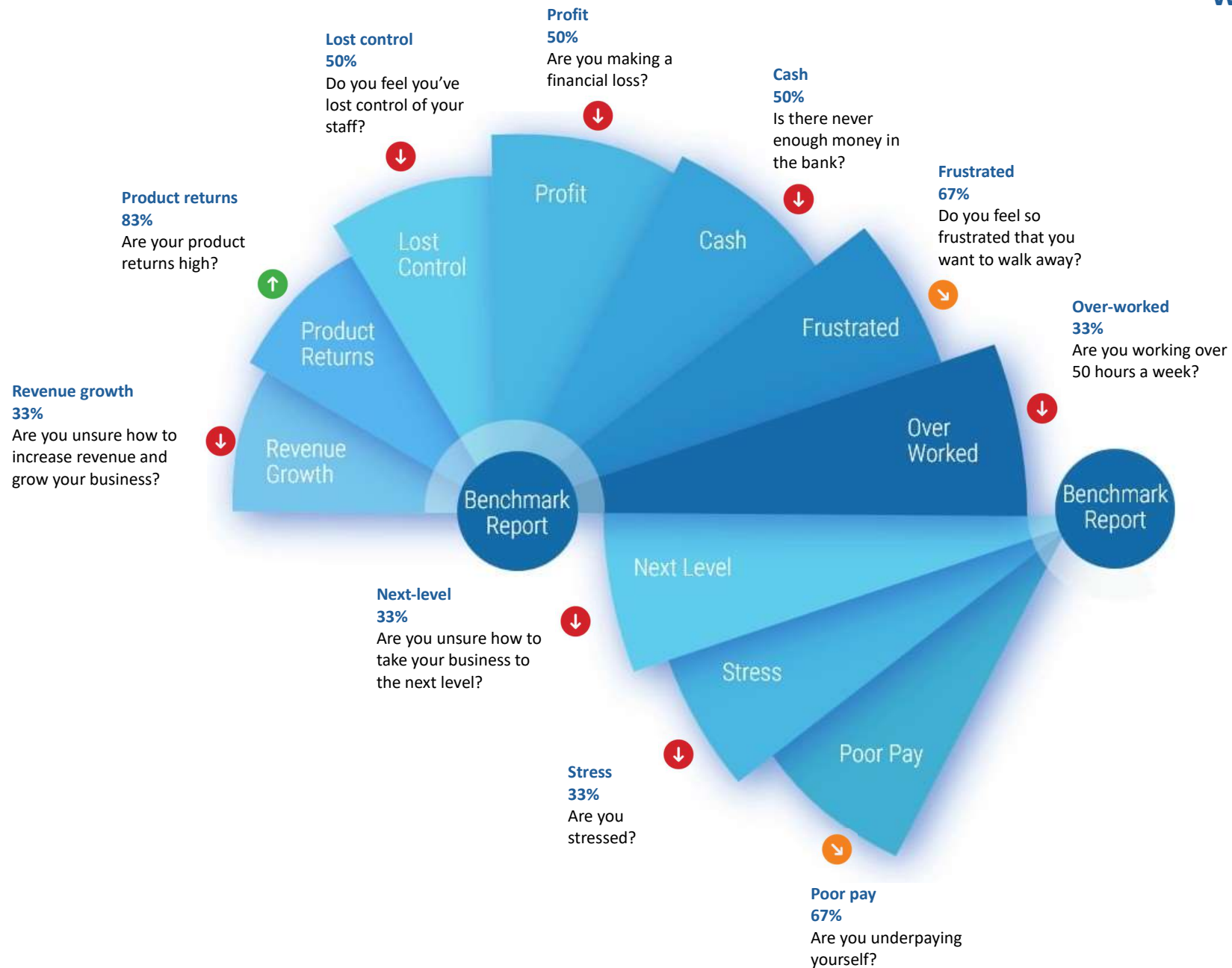
WARNING SIGNS



Your Warning Signs Score
50%











The Warning Signs section is designed to highlight potential red flags that could indicate deeper issues within your business. You scored 50% in this section.



This category addresses whether you’re experiencing high levels of stress, working excessive hours, or feeling unsure about the future direction of your business. These questions are a reminder that running a business should not come at the expense of your well-being. Identifying and addressing these warning signs early can prevent burnout and ensure that your business remains on a healthy trajectory.











YOUR RESPONSES & QUESTION EXPLANATIONS







SALES & MARKETING SCORECARD

Lead Inflow	Do you have enough high-quality leads coming in?	<i>This question assesses whether your business is generating a sufficient number of leads that have a high potential to convert into paying customers.</i>	2/6	33%	
Leads Follow-up	Are all leads followed up, and are conversions successful?	<i>Ensures that every lead is being actively pursued and that your business is effective at turning these leads into customers.</i>	4 / 6	67%	
Conversion Rate	Do you monitor the advertising-to-prospect conversion rate and cost?	<i>This evaluates whether you are tracking how effectively your advertising efforts are converting prospects into leads and at what cost.</i>	1 / 6	17%	
Cost of Acquisition	Do you track the conversion rate and cost of client acquisition?	<i>Checks whether you are monitoring how efficiently your business is converting leads into customers and the associated costs.</i>	2 / 6	33%	
Script Training	Do you regularly conduct script training with your staff?	<i>This question highlights the importance of regular training to ensure staff are prepared to communicate effectively with potential customers.</i>	1 / 6	17%	
Organic Leads	Do you generate organic (non-paid) leads for your business?	<i>Assesses whether your business is capable of attracting potential customers through unpaid methods like content marketing or SEO.</i>	3 / 6	50%	
Paid Advertising	Do you use paid advertising campaigns effectively?	<i>Ensures that your investment in paid advertising is generating desirable results and a positive return on investment.</i>	2 / 6	33%	
Customer Pain Points	Does your team thoroughly understand customer pain points?	<i>This checks if your staff deeply understands the problems and needs of your customers, which is crucial for providing value and closing sales.</i>	4 / 6	67%	
Centres of Influence	Do you develop and contact "centres of influence" for referrals?	<i>Evaluates whether you're building relationships with key individuals or groups that can refer new business to you.</i>	2 / 6	33%	
Customer Database	Do you maintain and utilize a customer and prospect	<i>Highlights the importance of having an organized database for tracking and marketing to both</i>	2 / 6	33%	











	database for marketing?	<i>current customers and potential leads.</i>			
Campaign Success	Do you monitor the success of all marketing campaigns?	<i>Ensures that you are evaluating the effectiveness of your marketing efforts to identify what's working and what's not.</i>	1 / 6	17%	
Testimonials	Do you have more than five testimonials on your website?	<i>Indicates the value of social proof and whether you have collected enough customer testimonials to boost credibility online.</i>	2 / 6	33%	


STRATEGY & PLANNING SCORECARD

Define Target Market	Do you have a clearly defined target market?	<i>Ensures that you have a specific group of potential customers identified to focus your marketing and sales efforts effectively.</i>	2/6	33%	
Clarify Point of Difference	Do you have a clear "point of difference" from the competition?	<i>Evaluates whether you've identified and communicated what makes your business unique compared to competitors.</i>	3 / 6	50%	
Conduct External Strategic Audit	Have you conducted competitor website visits and market analysis within 12 months?	<i>This checks if you're staying informed about your competitors and market trends to adjust your strategies accordingly.</i>	1 / 6	17%	
Perform Internal Strategic Audit	Have you completed an internal organizational and product audit?	<i>Assesses whether you've reviewed your business's operations and product offerings to ensure efficiency and competitiveness.</i>	1 / 6	17%	
Update SWOT Analysis	Have you developed a SWOT analysis with staff in the past year?	<i>This ensures that you've collaboratively evaluated your business's strengths, weaknesses, opportunities, and threats recently.</i>	1 / 6	17%	
Communicate Vision Statement	Do you have a clear vision statement known by all staff?	<i>Checks whether your business has a clear vision that guides your operations and is understood by everyone in the company.</i>	2 / 6	33%	
Revise Business & Marketing Plan	Have you updated your business and marketing plan within 12 months?	<i>Ensures that your strategic plans are current and reflect recent market conditions and business goals.</i>	1 / 6	17%	
Develop Exit & Succession Plan	Do you know when you will sell/exit the business and do you have a plan?	<i>Evaluates whether you have a plan in place for smoothly transitioning ownership or leadership when needed.</i>	1 / 6	17%	











Create Organizational Scorecard	Do you have a one-page business scorecard?	<i>This checks if you have a concise overview of key business metrics to track performance at a glance.</i>	1 / 6	17%	
Clarify One Page Milestones	Do you have an action plan divided by divisions and personnel?	<i>Ensures that your business's action plan is detailed, with clear responsibilities assigned to different teams or individuals.</i>	1 / 6	17%	
Increase Accountability	Have you introduced a culture of accountability with rewards and recognition?	<i>Assesses whether you've established systems for holding employees accountable and recognizing their achievements.</i>	1 / 6	17%	
Reduce Business Owner Reliance	Is your business reliant on the owner?	<i>Evaluates whether the business can operate independently of the owner, which is critical for scalability and succession planning.</i>	5 / 6	83%	
Position in Growth Market	Have you positioned yourself in a growth market?	<i>This checks whether your business is targeting a market segment that is expanding, offering growth potential.</i>	1 / 6	17%	
Foster Innovation	Do you continually innovate, improve, or add new products?	<i>Ensures that your business is staying competitive by regularly updating or expanding its offerings.</i>	1 / 6	17%	


CUSTOMER QUESTIONS

Implement Customer Feedback Systems	Do you monitor customer feedback and ask for suggestions?	<i>Assesses whether you actively seek and review customer feedback to improve your products or services.</i>	1/6	17%	
Centralize Customer Notes	Are all customer notes centrally logged?	<i>Ensures that all customer interactions and information are recorded in a central system, improving service consistency and efficiency.</i>	1 / 6	17%	
Ensure Access to Customer Records	Can your phone operators access customer records?	<i>Checks whether your customer service team has access to relevant customer information when needed, enabling better service.</i>	1 / 6	17%	
Plan Regular Customer Campaigns	Do you run campaigns for existing customers?	<i>Evaluates if you're actively engaging and upselling to current customers, which can be a key revenue driver.</i>	1 / 6	17%	
Categorize Customers	Can you categorize customers who bought one product but not another?	<i>Assesses whether you can identify cross-selling opportunities by tracking customer purchases.</i>	1 / 6	17%	
Monitor Customer Service	Do you monitor customer service performance by category and set goals?	<i>Ensures that you're tracking and improving the performance of your customer service team in specific areas.</i>	1 / 6	17%	
Follow Up on Returned Products	Do you contact customers who returned products to understand why?	<i>Evaluates whether you're taking the time to understand the reasons behind product returns, which can provide valuable insights.</i>	3 / 6	50%	
Survey Non-Converting Enquiries	Do you follow up with non-buying inquiries to understand why?	<i>Ensures that you're investigating why potential customers did not make a purchase, which can help improve conversion rates.</i>	1 / 6	17%	
Track Product Return Percentage	Do you track product return rates on a scorecard?	<i>Assesses whether you're keeping detailed records of product returns, which can indicate issues with products or services.</i>	1 / 6	17%	
Conduct Regular Customer Surveys	Do you conduct regular customer	<i>Checks if you're regularly gauging customer satisfaction, which is crucial for maintaining high service standards.</i>	1 / 6	17%	










	satisfaction surveys?				
Monitor Customer Lifetime Value	Do you monitor the lifetime value of your customers?	<i>Evaluates whether you're tracking how much revenue a customer generates over their lifetime, helping to prioritize customer retention.</i>	1 / 6	17%	


FINANCIAL SCORECARD

Budgets	Do you have clear budgets for the organization and each business unit?	<i>Ensures that your business has detailed budgets in place to manage finances effectively across all areas.</i>	4/6	67%	
Financial statements	Do you receive a monthly P&L statement, balance sheet, and cash flow reports?	<i>Evaluates whether you're regularly reviewing key financial documents to stay informed about your business's financial health.</i>	2 / 6	33%	
Cash to Revenue	Do you track your cash flow/revenue ratio?	<i>Assesses whether you're monitoring the relationship between cash flow and revenue, which is essential for financial stability.</i>	1 / 6	17%	
Accounting Systems	Is your accounting system efficient, up-to-date, and of good quality?	<i>Ensures that your accounting processes are robust, efficient, and capable of providing accurate financial data.</i>	5 / 6	83%	
Growth Funds	Do you have sufficient funds available for growth?	<i>Evaluates whether your business has enough capital on hand to support expansion or new investments.</i>	1 / 6	17%	
Working Capital	Do you monitor cash flow and know your cash situation a month ahead?	<i>Assesses whether you're proactively managing cash flow to avoid surprises and ensure financial stability.</i>	3 / 6	50%	
Debt Level	Do you manage company debt levels effectively?	<i>Ensures that you're keeping debt under control and making informed decisions about borrowing and repayment.</i>	3 / 6	50%	
Supplier Quotes	Do you regularly get 3 quotes and monitor pricing?	<i>Evaluates whether you're consistently seeking the best prices and reviewing costs to ensure value for money.</i>	1 / 6	17%	
Debtors	Are most debtors under 60 days, and do you follow up regularly?	<i>Assesses whether you're managing receivables efficiently by ensuring that customers pay within agreed terms.</i>	5 / 6	83%	
Creditors	Do you pay creditors on time and manage	<i>Ensures that you're maintaining good relationships with suppliers by paying them</i>	5 / 6	83%	











	payments efficiently?	<i>promptly and managing cash flow.</i>			
Stock Control	Do you have effective stock control measures to minimize waste?	<i>Evaluates whether you're managing inventory efficiently to reduce waste and costs associated with excess stock.</i>	4 / 6	67%	

PEOPLE SCORECARD









Recruitment Policies	Do you recruit staff based on job competency matching (e.g., recruitment tests)?	<i>Assesses whether you're hiring staff based on their ability to meet the specific competencies required for the role.</i>	3/6	50%	
Job Descriptions	Does each staff member have a job description?	<i>Ensures that every employee has a clear understanding of their role and responsibilities.</i>	5 / 6	83%	
Weekly Goals	Are weekly goals set and performance reviewed regularly for all employees?	<i>Evaluates whether you're setting clear objectives for employees and reviewing their performance regularly.</i>	2 / 6	33%	
Motivated Staff	Are your staff motivated, and is morale high?	<i>Checks whether your employees are engaged, motivated, and satisfied with their work environment.</i>	3 / 6	50%	
Staff Accountability	Are your staff held accountable for achieving set goals?	<i>Ensures that employees are responsible for meeting their targets, which drives performance and results.</i>	2 / 6	33%	
Regular Communication	Do you hold regular company communication meetings, like weekly staff meetings?	<i>Assesses whether you're keeping communication lines open within your team, which is vital for alignment and morale.</i>	1 / 6	17%	
Performance Appraisals	Do you conduct annual or bi-annual performance appraisals?	<i>Evaluates whether you're formally reviewing employee performance on a regular basis, providing feedback and setting new goals.</i>	1 / 6	17%	
Employee Social Functions	Do you organize staff activities and social functions?	<i>Ensures that you're fostering team spirit and morale through regular social interactions and team-building activities.</i>	3 / 6	50%	
Employee Training & Workshops	Do you conduct regular or at least annual team-building events?	<i>Assesses whether you're investing in team-building exercises to strengthen collaboration and teamwork.</i>	1 / 6	17%	

Transparent Employee Procedures	Do you have clear and transparent employee policies and procedures?	<i>Ensures that all staff are aware of company policies, which helps maintain consistency and fairness in the workplace.</i>	3 / 6	50%	
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COMPLIANCE SCORECARD

Employment Letter	Does each employee have an employment letter and confidentiality agreement?	This ensures employees understand their roles, terms of employment, and confidentiality obligations, fostering legal clarity and professional expectations.	5/6	83%	
Employment Manual	Do you have an employee manual?	An employee manual communicates company policies, roles, and expectations, creating consistency across the workforce.	3 / 6	50%	
Policies & Procedures	Do you maintain a policies and procedures manual?	Standardizing processes improves operational efficiency and ensures employees understand company guidelines.	5 / 6	83%	
Quality Assurance Plan	Do you have a QA plan if needed?	A QA plan ensures consistent product/service quality that meets standards and customer expectations.	5 / 6	83%	
OH&S Plan	Do you have an OH&S plan if needed?	Ensures compliance with Occupational Health and Safety regulations to protect employees and reduce workplace risks.	5 / 6	83%	
Employee Log	Do you log employee non-performance and issue written warnings?	Documenting performance issues helps maintain accountability and provides a clear record for corrective actions.	5 / 6	83%	
Accountability Systems	Do you have control over your staff?	Regular performance reviews and goal-setting help ensure effective team management and staff alignment with business objectives.	4 / 6	67%	
Environmental Plan	Do you have an environmental plan?	Demonstrates a commitment to minimizing the business's environmental impact and promoting sustainability.	1 / 6	17%	
Tax & Employee	Are you fully compliant with tax and employee obligations?	Ensures adherence to all tax regulations and employment laws, reducing legal risks and financial penalties.	6 / 6	100%	
Government Grants	Do you comply with all government mandates, licenses, and requirements?	Compliance with regulations and mandates ensures legal operation and access to government support.	6 / 6	100%	

WARNING SIGNS

Revenue Growth	Are you unsure how to increase revenue and grow your business?	<i>Highlights whether you're struggling to identify strategies for business growth and revenue generation.</i>	2/6	33%	
Product Returns	Are your product returns high?	<i>Assesses whether you're facing frequent returns, which could indicate product issues or dissatisfaction.</i>	5 / 6	83%	
Lost Control	Do you feel you've lost control of your staff?	<i>Evaluates whether you're experiencing challenges in managing your team effectively.</i>	3 / 6	50%	
Profit	Are you making a financial loss?	<i>Checks if your business is currently operating at a loss, which could signal financial instability.</i>	3 / 6	50%	
Cash	Is there never enough money in the bank?	<i>Assesses whether you're consistently facing cash flow problems, indicating poor financial management or insufficient revenue.</i>	3 / 6	50%	
Frustrated	Do you feel so frustrated that you want to walk away?	<i>Evaluates whether you're feeling overwhelmed or disillusioned with running your business, which could lead to burnout.</i>	4 / 6	67%	
Over-Worked	Are you working over 50 hours a week?	<i>Checks whether you're overworking, which may indicate inefficiencies or a lack of delegation in your business.</i>	2 / 6	33%	
Next Level	Are you unsure how to take your business to the next level?	<i>Highlights whether you're struggling with strategic planning and scaling your business.</i>	2 / 6	33%	
Stress	Are you stressed?	<i>Assesses whether you're experiencing high levels of stress, which can negatively impact your well-being and business performance.</i>	2 / 6	33%	
Poor Pay	Are you underpaying yourself?	<i>Evaluates whether you're compensating yourself fairly, which is essential for personal financial stability and motivation.</i>	4 / 6	67%	

ACTION PLAN

Developing an action plan

We have included below an action plan with items marked in green, yellow, or red to indicate priority. Here's how to approach it:







4. **Review:** Focus first on red and yellow areas, as these are the most critical for improvement.
5. **Prioritize:** Decide which actions require your direct involvement and which can be delegated to your team.
6. **Set Up a 90-Day Action Plan:** Using a 90-day plan allows you to tackle high-priority areas in focused, manageable steps.







Benefits of a 90-day action plan

A 90-day action plan is designed to help you and your team make consistent progress toward improvement. Here are some key benefits:

- **Clear, Achievable Goals:** Short-term goals keep you and your team focused on what's most important.
- **Accountability and Alignment:** With regular check-ins, everyone stays aligned and accountable.
- **Adaptability:** This short timeframe enables quick adjustments to reflect changing needs.
- **Resource Efficiency:** It allows you to allocate resources effectively, prioritizing high-impact areas.
- **Team Motivation:** Regular achievements within a 90-day framework boost morale and reinforce a culture of progress.
- **Long-Term Goal Support:** Each 90-day plan builds toward larger goals, making them more manageable.
- **Effective Performance Tracking:** Frequent progress checks let you identify what's working and adjust where necessary.

SALES & MARKETING SCORECARD ACTION PLAN



Action Summary	Assessment Question	Explanation	Your score			Action	Who	When	Progress Comments
Increase Lead Inflow	Do you have enough high-quality leads coming in?	<i>This question assesses whether your business is generating enough leads that have a high potential to convert into paying customers.</i>	2/6	33%		Implement new marketing strategies, including SEO, content marketing, and targeted social media campaigns, to generate more leads.			
Improve Leads Follow-Up	Are all leads followed up, and are conversions successful?	<i>Ensures that every lead is being actively pursued and that your business is effective at turning these leads into customers.</i>	4 / 6	67%		Develop a follow-up process with CRM integration and train the sales team on effective lead nurturing techniques.			
Boost Conversion Rate	Do you monitor the advertising-to-prospect conversion rate and cost?	<i>This evaluates whether you are tracking how effectively your advertising efforts are converting prospects into leads and at what cost.</i>	1 / 6	17%		Analyse the sales funnel to identify drop-off points and provide sales team training on closing techniques.			
Reduce Cost of Acquisition	Do you track the conversion rate and cost of client acquisition?	<i>Checks whether you are monitoring how efficiently your business is converting leads into customers and the associated costs.</i>	2 / 6	33%		Optimize marketing spend by analysing ROI of various channels and focusing on the most cost-effective methods.			
Enhance Script Training	Do you regularly conduct script training with your staff?	<i>This question highlights the importance of regular training to ensure staff are prepared to communicate effectively with potential customers.</i>	1 / 6	17%		Schedule regular training sessions for the sales team to ensure consistent and effective customer interactions.			
Increase Organic Leads	Do you generate organic (non-paid) leads for your business?	<i>Assesses whether your business is capable of attracting potential customers through unpaid methods like content marketing or SEO.</i>	3 / 6	50%		Strengthen efforts in content marketing, SEO, and social media engagement to drive more organic traffic.			

Optimize Paid Advertising	Do you use paid advertising campaigns effectively?	<i>Ensures that your investment in paid advertising is generating desirable results and a positive return on investment.</i>	2 / 6	33%		Review and adjust ad targeting, creative content, and budget allocation to improve ROI.			
Identify Customer Pain Points	Does your team thoroughly understand customer pain points?	<i>This checks if your staff deeply understands the problems and needs of your customers, which is crucial for providing value and closing sales.</i>	4 / 6	67%		Conduct customer surveys and workshops to better understand and address customer needs.			
Build Centres of Influence	Do you develop and contact "centres of influence" for referrals?	<i>Evaluates whether you're building relationships with key individuals or groups that can refer new business to you.</i>	2 / 6	33%		Create a strategy to identify and build relationships with key influencers who can refer business.			
Maintain Customer Database	Do you maintain and utilize a customer and prospect database for marketing?	<i>Highlights the importance of having an organized database for tracking and marketing to both current customers and potential leads.</i>	2 / 6	33%		Invest in a CRM system and ensure regular updates and segmentation for effective marketing.			
Monitor Campaign Success	Do you monitor the success of all marketing campaigns?	<i>Ensures that you are evaluating the effectiveness of your marketing efforts to identify what's working and what's not.</i>	1 / 6	17%		Set up tracking mechanisms and conduct regular reviews to evaluate and optimize campaign performance.			
Gather More Testimonials	Do you have more than five testimonials on your website?	<i>Indicates the value of social proof and whether you have collected enough customer testimonials to boost credibility online.</i>	2 / 6	33%		Actively solicit testimonials from satisfied customers and display them prominently on your website.			







STRATEGY & PLANNING ACTION PLAN






Action Summary	Assessment Question	Explanation	Your score			Action	Who	When	Progress Comments
Define Target Market	Do you have a clearly defined target market?	<i>Ensures that you have a specific group of potential customers identified to focus your marketing and sales efforts effectively.</i>	2/6	33%	↓	Conduct market research to better define and understand your target audience.			
Clarify Point of Difference	Do you have a clear "point of difference" from the competition?	<i>Evaluates whether you've identified and communicated what makes your business unique compared to competitors.</i>	3 / 6	50%	↓	Identify unique selling propositions (USPs) through competitor analysis and customer feedback.			
Conduct External Strategic Audit	Have you conducted competitor website visits and market analysis within 12 months?	<i>This checks if you're staying informed about your competitors and market trends to adjust your strategies accordingly.</i>	1 / 6	17%	↓	Schedule regular competitive analysis sessions and update strategies accordingly.			
Perform Internal Strategic Audit	Have you completed an internal organizational and product audit?	<i>Assesses whether you've reviewed your business's operations and product offerings to ensure efficiency and competitiveness.</i>	1 / 6	17%	↓	Organize an internal review of processes, products, and organizational efficiency.			
Update SWOT Analysis	Have you developed a SWOT analysis with staff in the past year?	<i>This ensures that you've collaboratively evaluated your business's strengths, weaknesses, opportunities, and threats recently.</i>	1 / 6	17%	↓	Conduct a new SWOT analysis involving key staff to reassess strengths, weaknesses, opportunities, and threats.			

Communicate Vision Statement	Do you have a clear vision statement known by all staff?	<i>Checks whether your business has a clear vision that guides your operations and is understood by everyone in the company.</i>	2 / 6	33%	↓	Reinforce the vision statement through internal campaigns and training sessions.			
Revise Business & Marketing Plan	Have you updated your business and marketing plan within 12 months?	<i>Ensures that your strategic plans are current and reflect recent market conditions and business goals.</i>	1 / 6	17%	↓	Update the business and marketing plans to reflect current goals and market conditions.			
Develop Exit & Succession Plan	Do you know when you will sell/exit the business and do you have a plan?	<i>Evaluates whether you have a plan in place for smoothly transitioning ownership or leadership when needed.</i>	1 / 6	17%	↓	Create a plan for business continuity and succession.			
Create Organizational Scorecard	Do you have a one-page business scorecard?	<i>This checks if you have a concise overview of key business metrics to track performance at a glance.</i>	1 / 6	17%	↓	Establish a business scorecard to track key performance indicators (KPIs) across departments.			
Clarify One Page Milestones	Do you have an action plan divided by divisions and personnel?	<i>Ensures that your business's action plan is detailed, with clear responsibilities assigned to different teams or individuals.</i>	1 / 6	17%	↓	Break down strategic goals into actionable steps for each team.			
Increase Accountability	Have you introduced a culture of accountability with rewards and recognition?	<i>Assesses whether you've established systems for holding employees accountable and recognizing their achievements.</i>	1 / 6	17%	↓	Establish clear performance metrics and a system for rewarding and recognizing achievement.			
Reduce Business	Is your business	<i>Evaluates whether the business can operate</i>	5 / 6	83%	↑	Delegate responsibilities and empower staff to			







Owner Reliance	reliant on the owner?	<i>independently of the owner, which is critical for scalability and succession planning.</i>				reduce dependence on the owner.			
Position in Growth Market	Have you positioned yourself in a growth market?	<i>This checks whether your business is targeting a market segment that is expanding, offering growth potential.</i>	1 / 6	17%		Explore new markets or innovate to stay competitive.			
Foster Innovation	Do you continually innovate, improve, or add new products?	<i>Ensures that your business is staying competitive by regularly updating or expanding its offerings.</i>	1 / 6	17%		Create a culture of continuous improvement by encouraging new ideas and regularly updating products.			






CUSTOMER QUESTIONS ACTION PLAN

Action Summary	Assessment Question	Explanation	Your score			Action	Who	When	Progress Comments
Implement Customer Feedback Systems	Do you monitor customer feedback and ask for suggestions?	<i>Assesses whether you actively seek and review customer feedback to improve your products or services.</i>	1/6	17%		Introduce feedback mechanisms such as surveys, reviews, and suggestion boxes to monitor customer satisfaction			
Centralize Customer Notes	Are all customer notes centrally logged?	<i>Ensures that all customer interactions and information are recorded in a central system, improving service consistency and efficiency.</i>	1 / 6	17%		Adopt a CRM system that logs and tracks customer interactions and preferences			
Ensure Access to Customer Records	Can your phone operators access customer records?	<i>Checks whether your customer service team has access to relevant customer information when needed, enabling better service.</i>	1 / 6	17%		Provide all relevant team members with easy access to customer information through a shared system			
Plan Regular Customer Campaigns	Do you run campaigns for existing customers?	<i>Evaluates if you're actively engaging and upselling to current customers, which can be a key revenue driver.</i>	1 / 6	17%		Develop and execute targeted campaigns for existing customers to increase loyalty and sales			
Categorize Customers	Can you categorize customers who bought one product but not another?	<i>Assesses whether you can identify cross-selling opportunities by tracking customer purchases.</i>	1 / 6	17%		Segment customers based on purchasing behaviour for targeted marketing efforts			
Monitor Customer Service	Do you monitor customer service performance by category and set goals?	<i>Ensures that you're tracking and improving the performance of your customer service team in specific areas.</i>	1 / 6	17%		Establish regular evaluations of customer service performance and set improvement goals			

Follow Up on Returned Products	Do you contact customers who returned products to understand why?	<i>Evaluates whether you're taking the time to understand the reasons behind product returns, which can provide valuable insights.</i>	3 / 6	50%		Implement a procedure to contact customers about returns and address any issues			
Survey Non-Converting Enquiries	Do you follow up with non-buying inquiries to understand why?	<i>Ensures that you're investigating why potential customers did not make a purchase, which can help improve conversion rates.</i>	1 / 6	17%		Follow up with a sample of inquiries to understand why they did not convert and adjust strategies accordingly			
Track Product Return Percentage	Do you track product return rates on a scorecard?	<i>Assesses whether you're keeping detailed records of product returns, which can indicate issues with products or services.</i>	1 / 6	17%		Create a system to monitor return rates and investigate underlying causes			
Conduct Regular Customer Surveys	Do you conduct regular customer satisfaction surveys?	<i>Checks if you're regularly gauging customer satisfaction, which is crucial for maintaining high service standards.</i>	1 / 6	17%		Establish a routine for collecting and analysing customer satisfaction data			
Monitor Customer Lifetime Value	Do you monitor the lifetime value of your customers?	<i>Evaluates whether you're tracking how much revenue a customer generates over their lifetime, helping to prioritize customer retention.</i>	1 / 6	17%		Calculate and track the lifetime value of customers to focus on high-value relationships			

FINANCIAL ACTION PLAN

Action Summary	Assessment Question	Explanation	Your score			Action	Who	When	Progress Comments
Develop Detailed Budgets	Do you have clear budgets for the organization and each business unit?	<i>Ensures that your business has detailed budgets in place to manage finances effectively across all areas.</i>	4 / 6	67%		Create detailed budgets for each business unit and regularly review financial performance against these targets.			
Ensure Monthly Financial Statements	Do you receive a monthly P&L statement, balance sheet, and cash flow reports?	<i>Evaluates whether you're regularly reviewing key financial documents to stay informed about your business's financial health.</i>	2 / 6	33%		Guarantee timely and accurate financial reporting with regular reviews.			
Improve Cash to Revenue Ratio	Do you track your cash flow/revenue ratio?	<i>Assesses whether you're monitoring the relationship between cash flow and revenue, which is essential for financial stability.</i>	1 / 6	17%		Enhance cash flow management by optimizing billing cycles and reducing outstanding receivables.			
Upgrade Accounting Systems	Is your accounting system efficient, up-to-date, and of good quality?	<i>Ensures that your accounting processes are robust, efficient, and capable of providing accurate financial data.</i>	5 / 6	83%		Transition to a more robust and user-friendly accounting system.			
Build Growth Funds	Do you have sufficient funds available for growth?	<i>Evaluates whether your business has enough capital on hand to support expansion or new investments.</i>	1 / 6	17%		Explore financing options or adjust expenditures to build reserves for growth opportunities.			
Increase Working Capital	Do you monitor cash flow and know your cash	<i>Assesses whether you're proactively managing cash flow to avoid</i>	3 / 6	50%		Strengthen cash flow management and ensure financial buffers are in place.			





	situation a month ahead?	<i>surprises and ensure financial stability.</i>							
Reduce Debt Levels	Do you manage company debt levels effectively?	<i>Ensures that you're keeping debt under control and making informed decisions about borrowing and repayment.</i>	3 / 6	50%		Implement a debt reduction plan to improve financial stability.			
Implement Purchasing Monitoring	Do you regularly get 3 quotes and monitor pricing?	<i>Evaluates whether you're consistently seeking the best prices and reviewing costs to ensure value for money.</i>	1 / 6	17%		Set up a system for obtaining quotes and regularly reviewing supplier pricing.			
Control Debtors	Are most debtors under 60 days, and do you follow up regularly?	<i>Assesses whether you're managing receivables efficiently by ensuring that customers pay within agreed terms.</i>	5 / 6	83%		Establish strict credit policies and follow-up procedures to ensure timely payments.			
Prioritize Timely Creditor Payments	Do you pay creditors on time and manage payments efficiently?	<i>Ensures that you're maintaining good relationships with suppliers by paying them promptly and managing cash flow.</i>	5 / 6	83%		Improve cash flow management and ensure timely payments to creditors.			
Optimize Stock Control	Do you have effective stock control measures to minimize waste?	<i>Evaluates whether you're managing inventory efficiently to reduce waste and costs associated with excess stock.</i>	4 / 6	67%		Adopt inventory management practices to minimize waste and optimize stock levels.			






PEOPLE SCORECARD


Action Summary	Assessment Question	Explanation		Your score		Action	Who	When	Progress Comments
Align Recruitment Policies	Do you recruit staff based on job competency matching (e.g., recruitment tests)?	<i>Assesses whether you're hiring staff based on their ability to meet the specific competencies required for the role.</i>	3/6	50%	↓	Adjust recruitment processes to match job competency requirements and consider pre-employment testing.			
Create Job Descriptions	Does each staff member have a job description?	<i>Ensures that every employee has a clear understanding of their role and responsibilities.</i>	5 / 6	83%	↑	Develop clear job descriptions for all positions to ensure role clarity and performance expectations.			
Set Weekly Goals	Are weekly goals set and performance reviewed regularly for all employees?	<i>Evaluates whether you're setting clear objectives for employees and reviewing their performance regularly.</i>	2 / 6	33%	↓	Establish a system for setting and reviewing weekly goals to keep teams aligned and accountable.			
Boost Staff Motivation	Are your staff motivated, and is morale high?	<i>Checks whether your employees are engaged, motivated, and satisfied with their work environment.</i>	3 / 6	50%	↓	Identify root causes of low morale and implement initiatives to improve motivation and job satisfaction.			
Enforce Staff Accountability	Are your staff held accountable for achieving set goals?	<i>Ensures that employees are responsible for meeting their targets, which drives performance and results.</i>	2 / 6	33%	↓	Introduce a performance management system that holds staff accountable for meeting goals.			

Increase Regular Communication	Do you hold regular company communication meetings, like weekly staff meetings?	<i>Assesses whether you're keeping communication lines open within your team, which is vital for alignment and morale.</i>	1 / 6	17%	↓	Schedule regular meetings and create communication channels to keep all staff informed and engaged.			
Conduct Performance Appraisals	Do you conduct annual or bi-annual performance appraisals?	<i>Evaluates whether you're formally reviewing employee performance on a regular basis, providing feedback and setting new goals.</i>	1 / 6	17%	↓	Implement a formal appraisal process to provide feedback and set development goals.			
Organize Employee Social Functions	Do you organize staff activities and social functions?	<i>Ensures that you're fostering team spirit and morale through regular social interactions and team-building activities.</i>	3 / 6	50%	↓	Plan regular social events to strengthen team bonds and improve workplace culture.			
Increase Employee Training & Workshops	Do you conduct regular or at least annual team-building events?	<i>Assesses whether you're investing in team-building exercises to strengthen collaboration and teamwork.</i>	1 / 6	17%	↓	Enhance the frequency of training and development opportunities.			
Clarify Employee Procedures	Do you have clear and transparent employee policies and procedures?	<i>Ensures that all staff are aware of company policies, which helps maintain consistency and fairness in the workplace.</i>	3 / 6	50%	↓	Develop and communicate clear employee policies and procedures.			

COMPLIANCE SCORECARD






Action Summary	Assessment Question	Explanation	Your score			Action	Who	When	Progress Comments
Issue Employment Letters	Does each employee have an employment letter and confidentiality agreement?	This ensures employees understand their roles, terms of employment, and confidentiality obligations, fostering legal clarity and professional expectations.	5/6	83%		Draft or review employment and confidentiality templates to align with current labour laws and business requirements. Ensure all staff receive and sign these documents during onboarding.			
Create Employment Manual	Do you have an employee manual?	An employee manual communicates company policies, roles, and expectations, creating consistency across the workforce.	3 / 6	50%		Develop a comprehensive manual with input from HR and management, including policies on workplace conduct, leave, and performance standards. Update annually.			
Develop Policies & Procedures Manual	Do you maintain a policies and procedures manual?	Standardizing processes improves operational efficiency and ensures employees understand company guidelines.	5 / 6	83%		Audit current processes, identify gaps, and draft a detailed manual covering all critical operations. Provide training to staff on its use.			
Establish Quality Assurance Plan	Do you have a QA plan if needed?	A QA plan ensures consistent product/service quality that meets standards and customer expectations.	5 / 6	83%		Identify necessary quality benchmarks and create a formal QA process. Assign responsibility for implementation and regular reviews to ensure ongoing adherence.			

Create OH&S Plan	Do you have an OH&S plan if needed?	Ensures compliance with Occupational Health and Safety regulations to protect employees and reduce workplace risks.	5 / 6	83%		Develop an OH&S plan tailored to your industry. Include risk assessments, emergency procedures, and training sessions for employees to ensure safety compliance.			
Maintain Employee Log	Do you log employee non-performance and issue written warnings?	Documenting performance issues helps maintain accountability and provides a clear record for corrective actions.	5 / 6	83%		Implement a structured logging system to record incidents of non-performance. Use this documentation to issue formal warnings and guide performance improvement plans.			
Implement Accountability Systems	Do you have control over your staff?	Regular performance reviews and goal-setting help ensure effective team management and staff alignment with business objectives.	4 / 6	67%		Introduce a system for regular one-on-one meetings, feedback sessions, and clear goal-setting. Leverage tools to track employee progress and maintain accountability.			
Develop Environmental Plan	Do you have an environmental plan?	Demonstrates a commitment to minimizing the business's environmental impact and promoting sustainability.	1 / 6	17%		Identify key areas where the business impacts the environment. Develop policies to address these areas and involve employees in sustainability initiatives.			
Ensure Tax and Employee Compliance	Are you fully compliant with tax and employee obligations?	Ensures adherence to all tax regulations and employment laws, reducing legal risks and financial penalties.	6 / 6	100%		Conduct an annual compliance review. Engage an accountant or legal professional to verify that all payroll, tax, and employee obligations are being met.			

Review Government Compliance	Do you comply with all government mandates, licenses, and requirements?	Understanding all the relevant regulations and mandates ensures you comply with all your legal obligations.	6 / 6	100%		Regularly review all licenses, permits, and grant requirements. Assign a team member to monitor updates to regulations and ensure timely renewals.			
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WARNING SIGNS

Action Summary	Assessment Question	Explanation	Your score			Action	Who	When	Progress Comments
Stimulate Revenue Growth	Are you unsure how to increase revenue and grow your business?	<i>Highlights whether you're struggling to identify strategies for business growth and revenue generation.</i>	2/6	33%	↓	Conduct a detailed market analysis, engage with stakeholders, explore partnerships, and create a strategic growth roadmap that outlines both short- and long-term objectives.			
Reduce Product Returns	Are your product returns high?	<i>Assesses whether you're facing frequent returns, which could indicate product issues or dissatisfaction.</i>	5 / 6	83%	↑	Identify patterns in returns, improve quality control processes, update customer feedback mechanisms, and enhance after-sales support to address recurring issues effectively.			
Regain Control	Do you feel you've lost control of your staff?	<i>Evaluates whether you're experiencing challenges in managing your team effectively.</i>	3 / 6	50%	↓	Reassess leadership strategies, establish clear communication channels, set measurable goals, and implement systems for regular feedback and accountability.			
Increase Profit	Are you making a financial loss?	<i>Checks if your business is currently operating at a loss, which could signal financial instability.</i>	3 / 6	50%	↓	Create a robust financial plan, cut unnecessary expenses, optimize pricing strategies, and diversify revenue streams for sustainable profitability.			
Improve Cash Flow	Is there never enough money in the bank?	<i>Assesses whether you're consistently facing cash flow problems, indicating poor financial management or insufficient revenue.</i>	3 / 6	50%	↓	Develop a cash flow forecast, negotiate better payment terms, reduce overheads, and explore financing options to ensure continuous liquidity.			

Manage Frustration	Do you feel so frustrated that you want to walk away?	<i>Evaluates whether you're feeling overwhelmed or disillusioned with running your business, which could lead to burnout.</i>	4 / 6	67%		Align your business goals and personal goals. Have a clear vision for the type of business you want to build. Engage a mentor or business coach, build a supportive network, and establish practices to delegate responsibilities and mitigate stress effectively.			
Balance Workload	Are you working over 50 hours a week?	<i>Checks whether you're overworking, which may indicate inefficiencies or a lack of delegation in your business.</i>	2 / 6	33%		Automate repetitive tasks, reallocate responsibilities, hire additional staff, and implement time management strategies to balance workload and maintain efficiency.			
Develop Growth Strategy	Are you unsure how to take your business to the next level?	<i>Highlights whether you're struggling with strategic planning and scaling your business.</i>	2 / 6	33%		Conduct a SWOT analysis, set measurable growth objectives, research market opportunities, and devise a strategic plan for scaling and innovation.			
Manage Stress	Are you stressed?	<i>Assesses whether you're experiencing high levels of stress, which can negatively impact your well-being and business performance.</i>	2 / 6	33%		Prioritize self-care, practice stress-reducing techniques like mindfulness, and build a reliable team to distribute workloads and responsibilities effectively.			
Ensure Fair Pay	Are you underpaying yourself?	<i>Evaluates whether you're compensating yourself fairly, which is essential for personal financial stability and motivation.</i>	4 / 6	67%		Adjust the budget if possible to align with personal financial needs, set fair compensation standards, and monitor financial health to ensure continued viability.			

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