



willowcrossconsulting.com | 910) 777-7181

Business Health Assessment

Strong roots. Smart systems. Sustainable growth.

The Willowcross Consulting Business Health Check is designed to help business owners assess the overall health of their business across the areas that most directly impact growth, profitability, efficiency, and sustainability.

Date: _____

Business Name: _____

Business Health Assessment

Category

Score (1 lowest - 5 highest)

1. Vision & Strategy

Clarity of direction, goals, metrics, and alignment.

/25

2. Leadership & Accountability

Leadership effectiveness, roles, expectations, and accountability.

/25

3. Operations & Systems

Processes, efficiency, consistency, and continuous improvement.

/25

4. Financial Health

Financial management, profitability, cash flow, and planning.

/25

5. Sales & Business Development

Lead generation, sales process, conversion, and referrals.

/25

6. Marketing & Visibility

Brand clarity, communication, marketing strategy, and results.

/25

7. Customer Experience

Client satisfaction, communication, feedback, and loyalty.

/25

8. Team & Culture

Engagement, communication, training, and culture.

/25

9. Technology & Tools

Technology effectiveness, integration, and data security.

/25

10. Owner Capacity & Sustainability

Delegation, time management, owner dependency, and long-term sustainability.

/25

Scoring Guide

Total Score ____ / 250

225-250 = Thriving - Exceptional! Keep building on your momentum.

200-224 = Strong - Solid foundation. A strategic tune-up could unlock your next level.

175-199 = Stable - Key gaps may be limiting growth. Consider a focused strategy session.

150-174 = Needs Attention - Multiple areas need support. A guided action plan can help.

Below 150 = At Risk - Immediate intervention recommended.

Scored below 225? Willowcross Consulting offers complimentary discovery calls to help you prioritize next steps and build a clear path forward. Visit willowcrossconsulting.com or reach out directly.

