LEVEL UP
BUSINESS PARTNERING

Business Health Check.

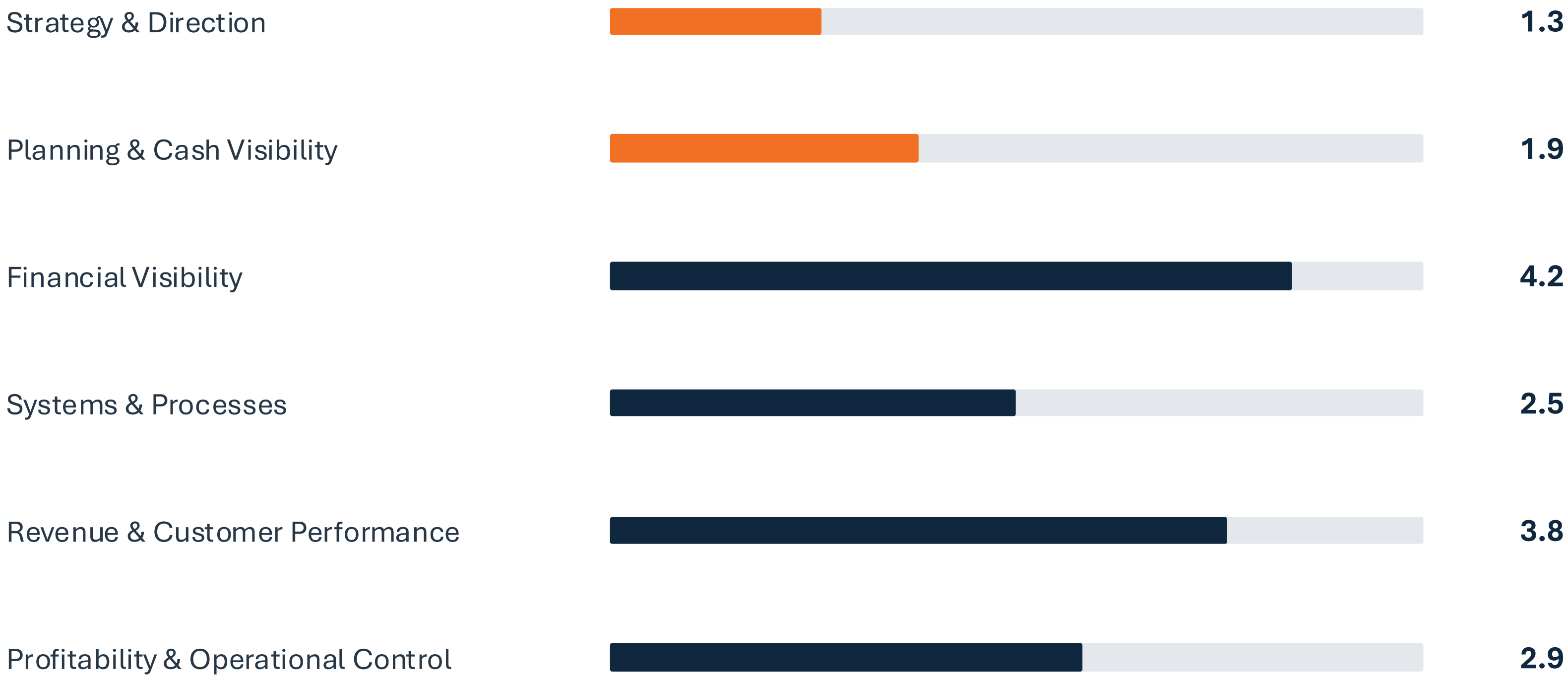
Illustrative report | How Level Up turns financial information into practical business priorities

Results, not just advice.

Illustrative example based on an anonymised trade services business. Figures have been adapted for demonstration purposes.

Business Health Snapshot

A high-level view from the questionnaire and financials supplied. Illustrative trade services business.



OVERALL SCORE

2.8/5

STRONGEST AREA

Financial Visibility 4.2/5

PRIORITY AREA

Strategy & Direction 1.3/5

The business has encouraging revenue and reporting foundations, but stronger strategy, planning and operational discipline are needed to convert growth into more predictable profit and cash flow.

Illustrative example only. Each category is scored out of 5 and equally weighted.

What the Health Check indicates

An illustrative view of the findings a Health Check produces.

01

WHAT'S WORKING

- Bookkeeping appears current and well controlled, with the Profit & Loss and Balance Sheet structured clearly enough to support management review.
- Revenue increased approximately 22% to $1.5m.
- Gross margin remained broadly stable at 36.0%, while net profit improved to approximately $45k, or 3.0% of revenue.
- Core systems support the workflow from enquiry through to invoicing, providing a foundation for further process improvement.

02

WHAT NEEDS VISIBILITY

- Labour delivery costs increased from 52% to 56% of revenue, absorbing approximately $60k more of every $1.5m in revenue.
- No current monthly budget or forward cash-flow forecast is in place.
- Business direction and goals are understood informally but are not clearly documented or measured.
- Systems support the core workflow, but inconsistent processes limit reliable job and profitability visibility.

Recommended next step: establish the strategy, financial plan and monthly performance rhythm needed to convert revenue growth into stronger and more predictable profit.

Your Business Health Check identifies where the business is strong, where visibility is limited and what should be addressed next.

Appendix: what each category means

A reference guide to the six assessment categories and what sits behind each score.

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STRATEGY & DIRECTION

Whether the direction of the business is written down and measurable, rather than carried in the owner's head.

WHAT WE LOOK AT

- Documented longer-term direction [Q]
- Specific, measurable 12-month goals [Q]

PLANNING & CASH VISIBILITY

Whether you can see the year ahead financially, and hold enough capacity to absorb a slow month.

WHAT WE LOOK AT

- Current monthly P&L budget [Q]
- Forward cash-flow forecast [Q]
- Short-term financial capacity [F]
- Balance-sheet leverage [F]

FINANCIAL VISIBILITY

Whether the reports you already receive are structured well enough to make decisions from.

WHAT WE LOOK AT

- Revenue, direct costs and overheads separated [F]
- Balance sheet complete and explainable [F]
- Monthly review that leads to actions [Q]

SYSTEMS & PROCESSES

Whether the business runs on defined steps that hold up through a busy period or a new hire.

WHAT WE LOOK AT

- Consistent enquiry-to-payment workflow [Q]

REVENUE & CUSTOMER PERFORMANCE

Whether growth is genuine, and whether you can see which work and customers drive it.

WHAT WE LOOK AT

- Revenue stable or growing [F]
- Profitability visible below total-business level [Q]

PROFITABILITY & OPERATIONAL CONTROL

Whether work is priced, costed and delivered at a margin that holds as volume grows.

WHAT WE LOOK AT

- Gross margin stable or improving [F]
- Net profit margin stable or improving [F]
- Labour delivery cost stable or improving [F]

[Q] assessed from the pre-session questionnaire.
[F] assessed from the Profit & Loss and Balance Sheet supplied.
The discussion validates the preliminary findings and helps determine the appropriate next step.
Inputs not available are excluded rather than counted against the business.