



Simplify. Streamline. Scale.

Helping MSMEs unlock structured growth through Business Process Re-Engineering and Sales Advisory.

Your Free Diagnostic Checklist

How to Use This Checklist

This quick diagnostic helps SME and MSME owners identify gaps in their business processes, sales systems, and leadership practices. Score yourself honestly on each parameter. The more 'No' responses you have, the greater the need for structured intervention.

Business Process & Operations

- ☐ Do you have documented workflows for all critical functions?
- ☐ Are responsibilities clearly defined for every team member?
- ☐ Is there a system to monitor operational efficiency regularly?
- ☐ Do you review vendor and procurement processes with approvals and thresholds?

Sales & Marketing

- ☐ Do you have a clear, stage-wise sales funnel that your team follows?
- ☐ Is your pipeline reviewed daily/weekly with defined KPIs?
- ☐ Do you track conversion rates from lead to closure consistently?
- ☐ Are marketing efforts aligned to a defined target audience (SMEs/consumers)?

Leadership & Team

- ☐ Do your managers and team leads have clarity on decision-making authority?
- ☐ Are you investing in leadership or coaching sessions for yourself and your team?
- ☐ Do you have SOPs for team onboarding, training, and escalation handling?
- ☐ Is accountability tracked and rewarded across functions?

Finance & Governance

- ☐ Do you have monthly financial dashboards (P&L, cashflow, receivables)?
- ☐ Is GST/TDS/Compliance fully monitored and updated on time?
- ☐ Do you set quarterly budgets and review deviations?
- ☐ Are approvals structured for expenses beyond thresholds?

Scoring Your Readiness

Count your 'Yes' answers:

- 12+ Yes ® Your business is structured well, focus on scaling.
- 8-11 Yes ® Some processes are in place, but gaps exist. Prioritize intervention.
- 4-7 Yes ® Your business is running with significant risks. Structure urgently needed.
- 0-3 Yes ® Immediate re-engineering required across all areas.

Next Step

If you scored less than 12, CoachSB can help you identify the right frameworks, build SOPs, and streamline your business.

Schedule a discovery call today.

[Schedule Discovery Call](#)



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