



# Business Assessment & Diagnostic Review Template

## Client / Business Information

- Business Name:
  - Owner / Primary Decision Maker:
  - Industry:
  - Business Stage (Startup / Growth / Established):
  - Years in Operation:
  - Number of Employees / Contractors:
  - Date of Assessment:
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## 1. Business Overview

### Business Description

Brief overview of products/services and target customers.

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### Core Objectives

What is the business currently focused on achieving?

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## 2. Leadership & Strategy

### Vision & Direction

- Is there a clearly defined vision? ☐ Yes ☐ No
  - Are short- and long-term goals documented? ☐ Yes ☐ No
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## Strategic Alignment

- Are current activities aligned with stated goals?
- Are priorities clearly communicated and executed?

**Rating (1–5):** ☐1 ☐2 ☐3 ☐4 ☐5

**Notes:**

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## 3. Financial Health & Performance

### Revenue

- Primary revenue streams:
  - Revenue consistency: ☐ Low ☐ Moderate ☐ High
  - Revenue growth trend: ☐ Declining ☐ Stable ☐ Growing
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### Expenses & Profitability

- Major expense categories:
  - Profitability status: ☐ Unprofitable ☐ Break-even ☐ Profitable
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### Cash Flow

- Cash flow consistency: ☐ Poor ☐ Fair ☐ Strong
  - Ability to cover operating expenses: ☐ Yes ☐ No
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## Financial Systems

- Budget in place? ☐ Yes ☐ No
- Financial tracking system used:
- Separation of personal & business finances? ☐ Yes ☐ No

**Financial Risk Level:** ☐ Low ☐ Medium ☐ High

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## 4. Operations & Processes

### Operational Efficiency

- Are processes documented? ☐ Yes ☐ No
- Are there recurring bottlenecks? ☐ Yes ☐ No

**Rating (1–5):** ☐1 ☐2 ☐3 ☐4 ☐5

**Notes:**

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### Tools & Systems

- Key tools/software used:
  - System effectiveness: ☐ Low ☐ Moderate ☐ High
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## 5. Sales & Marketing

### Customer Acquisition

- Primary sales channels:
  - Lead generation consistency: ☐ Low ☐ Moderate ☐ High
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## Marketing Strategy

- Clear marketing strategy in place? ☐ Yes ☐ No
- Performance tracking in place? ☐ Yes ☐ No

Notes:

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## 6. Team & Capacity

### Team Structure

- Employees / Contractors:
  - Role clarity: ☐ Low ☐ Moderate ☐ High
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### Capacity & Workload

- Is workload sustainable? ☐ Yes ☐ No
  - Risk of burnout or inefficiency? ☐ Yes ☐ No
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## 7. Customer Experience

### Client Satisfaction

- Feedback or reviews collected? ☐ Yes ☐ No
  - Retention rate: ☐ Low ☐ Moderate ☐ High
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### Service Delivery

- Service consistency: ☐ Poor ☐ Fair ☐ Strong
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## 8. Risk & Compliance

### Business Risks

- Financial risk:
  - Operational risk:
  - Market risk:
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### Compliance

- Licenses and registrations current? ☐ Yes ☐ No
  - Insurance coverage adequate? ☐ Yes ☐ No
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## 9. SWOT Summary

### Strengths

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### Weaknesses

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### Opportunities

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### Threats

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## 10. Overall Assessment Scorecard

Area	Rating (1–5)	Notes
Strategy & Direction		
Financial Health		
Operations		
Sales & Marketing		
Team & Capacity		
Customer Experience		

## 11. Key Findings & Insights

### Top Strengths Identified:

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### Key Gaps & Challenges:

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## 12. Recommendations & Strategic Priorities

### Immediate (0–90 Days)

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### Short-Term (3–6 Months)

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### Long-Term (6–12 Months)

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## 13. Readiness for Growth

- Growth readiness level: ☐ Low ☐ Moderate ☐ High
  - Primary constraints to growth:
  - Support needed:
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## 14. Next Steps

### Action Items

Action Owner Timeline

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### Consultant Notes

(Internal use or executive summary)

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