



# 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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