

# The FIXER AUDIT

## QUESTIONNAIRE

Use this questionnaire as a guided discovery tool to assess your business in five key areas. Answer each question honestly to pinpoint gaps, strengths, and areas ready for improvement.

### *Financial Clarity*

- Do you have up-to-date financial statements (P&L, balance sheet, cash flow)?
- Do you review financial reports regularly and understand the story they tell?
- Can you clearly state your profit margins per service or product?
- Do you forecast revenue and expenses on a monthly or quarterly basis?
- Are your accounts receivable/payable processes timely and organized?

### *Operational Efficiency*

- Are your core business processes documented and followed consistently?
- Are there clear handoffs between departments or roles?
- Are tasks tracked using a project management tool or system?
- Are recurring issues or mistakes being tracked and addressed?
- Have you automated or streamlined routine admin work?

### *Team & Leadership*

- Does each team member have a defined role and measurable KPIs?
- Are performance reviews conducted regularly?
- Do you have regular team meetings or check-ins?
- Is communication across your team clear, timely, and productive?
- Do you feel confident in delegating key responsibilities?

### *Systems & Tools*

- Do your software tools integrate with one another (CRM, finance, email, etc.)?
- Are you using the full capabilities of your key tools?
- Is there clarity about which tools to use for which tasks?
- Are any team members creating side systems that bypass core processes?
- Do you have backup procedures and cybersecurity protocols in place?

### *Growth Strategy*

- Do you have 90-day and 12-month goals written down and tracked?
- Do you know your customer acquisition cost (CAC) and lifetime value (LTV)?
- Is your sales process documented and repeatable?
- Are your marketing efforts consistent and generating leads?
- Do you have a plan for growth that doesn't rely solely on you?