



Business Health Check

A practical review to help an existing business identify what is working, what needs attention, and what to simplify next

A difficult season does not automatically mean the entire business has failed. Review each area honestly, using real numbers where possible, and select one problem to investigate before trying to change everything.

1. Sales and profit

☐ Working well	☐ Needs attention	I know my total sales for the last 30 to 90 days
☐ Working well	☐ Needs attention	I know my actual profit after expenses
☐ Working well	☐ Needs attention	I track materials, fees, shipping, labor, and overhead
☐ Working well	☐ Needs attention	My prices are based on costs and profit - not guessing
☐ Working well	☐ Needs attention	I know which offers are profitable and which are not

2. Products or services

☐ Working well	☐ Needs attention	Customers understand what I offer
☐ Working well	☐ Needs attention	My product or service solves a clear need
☐ Working well	☐ Needs attention	I am not carrying too many weak offers
☐ Working well	☐ Needs attention	I know which products deserve more focus
☐ Working well	☐ Needs attention	My quality and customer experience are consistent

3. Customers and sales

☐ Working well	☐ Needs attention	I know who my best customer is
☐ Working well	☐ Needs attention	I know where customers discover my business
☐ Working well	☐ Needs attention	I follow up appropriately after inquiries or purchases
☐ Working well	☐ Needs attention	I have a plan for repeat customers and referrals
☐ Working well	☐ Needs attention	My sales process is simple enough to complete

4. Marketing and visibility

☐ Working well	☐ Needs attention	My website and social information are current
☐ Working well	☐ Needs attention	My links, buttons, forms, and checkout work
☐ Working well	☐ Needs attention	I market consistently instead of only when sales are slow
☐ Working well	☐ Needs attention	My photos and descriptions clearly show the value
☐ Working well	☐ Needs attention	I track which marketing activities produce results

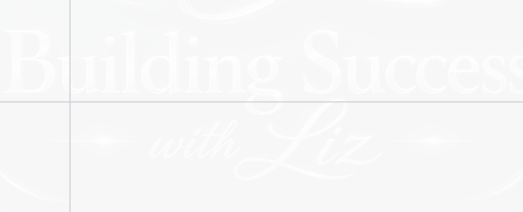
5. Money and operations

☐ Working well	☐ Needs attention	Business and personal money are kept separate
☐ Working well	☐ Needs attention	I know which monthly expenses are necessary
☐ Working well	☐ Needs attention	I have a basic process for inventory or client work
☐ Working well	☐ Needs attention	Orders, records, and documents are organized
☐ Working well	☐ Needs attention	I am not buying inventory without evidence of demand

6. Time, capacity, and real life

☐ Working well	☐ Needs attention	My turnaround times match my actual capacity
☐ Working well	☐ Needs attention	I have realistic working hours and boundaries
☐ Working well	☐ Needs attention	I am not offering more than I can maintain
☐ Working well	☐ Needs attention	I have identified tasks to automate, batch, delegate, or stop
☐ Working well	☐ Needs attention	The business plan fits my health, family, work, and responsibilities

My 30-day improvement focus

The most urgent issue is:		
The evidence I will review:		
One change I will test:		
What I will pause, simplify, or stop:		
How I will measure improvement:		
My review date:		

A struggling area is information, not a final judgment. Choose one issue, review the facts, test one improvement, and give the change enough time to produce useful evidence.

For educational purposes only. This worksheet does not provide individualized legal, tax, accounting, financial, human-resources, or professional advice and does not guarantee business results.