

Business Health Assessment

Before any meeting with a seller, make sure you've asked, and answered, all the following questions

Name: _____ Date: _____

1. How much profit do you have from your business?

- No idea how much profit I make
- I have a general idea
- I know what I make, but not what I spend
- I have good records of both, but only review during tax time
- I have great records of both, and know exactly how much profit I've earned year to date

2. How much do your clients love you when they work with you?

- I don't think they like me
- I can't tell if they like me
- I think they like me, but no idea
- We get along great and have a great relationship during the transactions
- My clients love me, and refer to me regularly

3. How clear are your goals for this year?

- I have none
- I picked some at the beginning of the year, but don't know where I'm at now
- I have goals, but they don't drive me to do anything
- I have goals, and keep an eye on them throughout the year
- I have clear goals, and track where I'm at regularly

4. Every day I

- wake up and let the day take me where it wants/needs to
- wake up with a to-do list, and get that stuff done
- I typically have a plan, but it often gets hijacked by other things
- I've time blocked a few things and typically do it
- I have key business things scheduled daily, and do them when they're scheduled

5. How well do you know the current market conditions?

- I just hear things from others and go with it
- I use what I'm experiencing personally to educate me
- I take time to research what's happening
- I know the market well, I'm not so great at talking about it with my clients/sphere
- I make a point to know the market well, and use it to educate my clients and sphere

6. How well have you identified your ideal client?

- I don't have one
- I have some knowledge of my ideal clients characteristics, but there are gaps in my use of this information
- I have a decent understanding of my ideal client
- I have a good grasp of my ideal client, and tailor my services and content to fit their needs
- I have a clear picture and understanding of my ideal client, and I use this in all of my content and marketing messages

7. How well do you Network for business?

- I don't - I hate networking
- I occasionally network, but not consistent
- I actively engage in networking, but I don't often build meaningful relationships from it
- I love to network, and actively seek out opportunities to connect with others and build relationships
- Networking is a central part of my business strategy

8. How are your tracking habits?

- I don't know what to track or how
- I know what to track but I don't do it
- I track basic income and expenses, but not regularly
- I have a tracking system I like, and track regularly
- I track everything, and monitor and analyze it to make decisions in my business

9. How is your marketing plan?

- I don't have one
- I send mailers to my sphere every now and then
- I market to my sphere via email, mail, social, and phone calls or texts, but not consistently
- I have a specific marketing plan, but it's not consistent
- I have a specific marketing plan, and follow and track results to make future decisions on marketing

10. Where is your business currently?

- Way behind where I want/need to be
- A little behind where I want/need to be
- Right where where I want/need to be
- A little ahead where I want/need to be
- I'm way ahead where I want/need to be