

Monthly Business Health Checklist Part 1

January to June

Rate yourself each month between 0 and 5. 1 for poor 5 for excellent and 0 not applicable

Do not worry if you score poorly in lots of areas, you will not be alone



Select 3 areas to focus on in the next 4 weeks and commit to actions to improve in these areas

	J	F	M	A	M	J
Work Skills & Quality						
Technical competence						
Training and continual staff development						
Keeping up to date with relevant technology						
Pricing						
Our pricing reflects the value we offer customers						
We offer our customers a range of prices						
Customer Service						
We have a customer service policy						
We regularly obtain feedback from customers						
Our customers rate us highly on customer service						
System & Process						
Employees know exactly what to do						
Strong processes deliver consistent outcomes						
Generally, if someone is absent we can cover						
All critical processes are documented						
Planning & Control						
Work flow meetings are held weekly						
Goals are set and monitored						
Priority is given to important strategic issues as opposed to the crisis management approach						

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	J	F	M	A	M	J
Financial Management						
Knowledge of last month's profit						
Prepare annual profit & cash flow budgets						
Prepare monthly or quarterly financial reports						
Regular meetings with accountant to discuss results, and forward forecasts						
Tax planning attended to quarterly						
Weekly targets set and monitored						
Rate Tracker updated daily so as to determine profitable customers and profitable job types.						
Marketing						
Strategies in place to segment profitable customers and profitable services						
New A class customers recruited each month						
Monthly marketing meetings held						
People Development						
We are an employer of choice						
All employees attend regular training events						
Monthly team meetings held where the focus is on the team						
Succession & Retirement						
Meet with accountant each year to discuss and review retirement and succession plan.						

Monthly Business Health Checklist Part 2

July to December

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