

# BUSINESS GROWTH SELF-ASSESSMENT



This scorecard will help you identify the structural and strategic gaps that might be holding back your growth. Answer honestly, this is for your own clarity.

DATE: \_\_\_\_\_

## SECTION 1: OPERATIONS & DELIVERY

- 1. We have written internal processes for every key area (sales, delivery, onboarding). \_\_\_\_\_
- 2. Tasks are assigned through a central system (not WhatsApp or memory). \_\_\_\_\_
- 3. Our service or product can be delivered by someone else without major quality loss. \_\_\_\_\_
- 4. We conduct regular internal reviews to improve how we deliver to clients. \_\_\_\_\_

## SECTION 2: SALES, REVENUE & FORECASTING

- 5. We track our revenue weekly or monthly and compare it to forecasts. \_\_\_\_\_
- 6. We know the lifetime value (LTV) of a typical client or customer. \_\_\_\_\_
- 7. We have a predictable system for generating leads (not just referrals or luck). \_\_\_\_\_
- 8. We've documented our sales script, pricing structure, and offer breakdown. \_\_\_\_\_

## SECTION 3: BRAND, CLIENTS & RETENTION

- 9. Our brand message is documented and consistently applied across all platforms. \_\_\_\_\_
- 10. We have a client offboarding or review process after each engagement. \_\_\_\_\_
- 11. We track client churn or drop-off rate and review causes. \_\_\_\_\_
- 12. We segment our clients and communicate with each segment differently. \_\_\_\_\_

NO

YES

NO

YES

## SECTION 4: TEAM, SYSTEMS & SCALABILITY

- 13. Each team member has a role document, KPIs, and weekly deliverables.
- 14. We have a central dashboard that shows progress across key operations or projects.
- 15. We've identified which parts of the business need to be automated or delegated.
- 16. We conduct structured onboarding for new hires or freelancers.

## SECTION 5: FINANCE & STRATEGIC PLANNING

- 17. We have at least 3 months of runway or operational reserves in the business.
- 18. We've documented and reviewed our business goals for the next 6-12 months.
- 19. We can identify our most profitable service, product, or client segment.
- 20. We've invested in digital marketing and made sales through audience targeting .

**YOUR SCORE:**

\_\_\_\_\_

### Scoring Guide:

17-20: You're structurally ready to grow. Now it's time to scale with precision.

12-16: You're progressing well, but hidden inefficiencies could stall your growth.

8-11: You have a solid base — but it's time to address gaps before you expand.

Below 8: Your foundation needs attention. Start with structure.

### Need Guidance?

Book a free business clarity session with Royalroot Professional Management Services.

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