

Smarter Business Builder Checklist

✓ 42 Questions That Test Business Strength

Scaling a business is not about doing more, it is about getting clearer. This checklist helps you see whether your business is actually set up to grow, or whether hidden gaps are draining time, profit and confidence. A few quick Yes or No answers will show where you are strong, where you need focus and what to work on next so you can build a business that grows with less stress and stronger profitability.



PlanA Consulting
plan for success

15+ years supporting the growth of Kiwi businesses.

GENERAL

We have a clear definition of what success looks like.

☐ Yes ☐ No

We know who our ideal customer is.

☐ Yes ☐ No

We know where our customers come from.

☐ Yes ☐ No

We know our average sale value.

☐ Yes ☐ No

We know our current annual revenue.

☐ Yes ☐ No

We know our desired revenue.

☐ Yes ☐ No

We know the top challenges holding the business back.

☐ Yes ☐ No

Add up your Yes scores: ____ / 7

6-7: Strong. Keep going

4-5: Needs attention

0-3: Time to make some changes





PLANNING

We have a clear strategic plan.

☐ Yes ☐ No

We have an annual plan.

☐ Yes ☐ No

We have quarterly priorities in place.

☐ Yes ☐ No

We hold structured monthly planning sessions.

☐ Yes ☐ No

We track progress against key KPIs.

☐ Yes ☐ No

We have a clear organisational chart.

☐ Yes ☐ No

We maintain a current risk register.

☐ Yes ☐ No

Add up your Yes scores: ____ / 7

6-7: Strong. Keep going

4-5: Needs attention

0-3: Time to make some changes

SALES & MARKETING

We have an up-to-date customer database.

☐ Yes ☐ No

We communicate with our database every 90 days.

☐ Yes ☐ No

We have a customer care programme in place.

☐ Yes ☐ No

We have clear sales targets.

☐ Yes ☐ No

We follow a structured sales process.

☐ Yes ☐ No

We have a prospecting plan.

☐ Yes ☐ No

We manage our sales pipeline consistently.

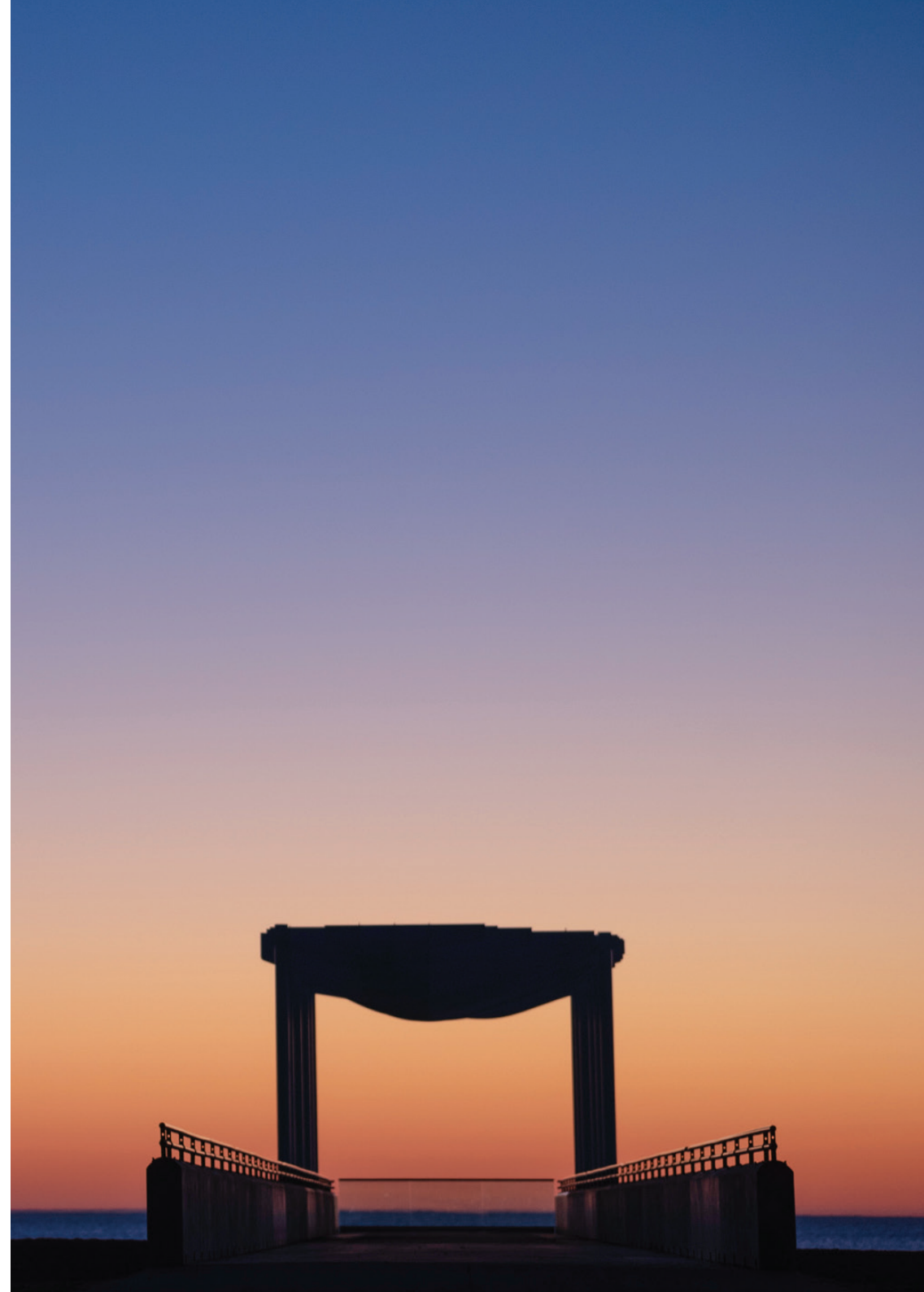
☐ Yes ☐ No

Add up your Yes scores: ____ / 7

6-7: Strong. Keep going

4-5: Needs attention

0-3: Time to make some changes





OPERATIONS

We have clear workflows documented.

☐ Yes ☐ No

We have standard operating procedures in place.

☐ Yes ☐ No

We track work in progress accurately.

☐ Yes ☐ No

We have quality assurance steps in place.

☐ Yes ☐ No

We schedule work efficiently.

☐ Yes ☐ No

We plan capacity ahead.

☐ Yes ☐ No

We monitor time on key activities.

☐ Yes ☐ No

Add up your Yes scores: ____ / 7

6-7: Strong. Keep going

4-5: Needs attention

0-3: Time to make some changes

FINANCE & ADMIN

We have a cashflow forecast in place.

☐ Yes ☐ No

We have an annual budget.

☐ Yes ☐ No

We review monthly P&L statements.

☐ Yes ☐ No

We manage debtors proactively.

☐ Yes ☐ No

We manage stock levels effectively.

☐ Yes ☐ No

We monitor gross margins.

☐ Yes ☐ No

We track key financial KPIs.

☐ Yes ☐ No

Add up your Yes scores: ____ / 7

6-7: Strong. Keep going

4-5: Needs attention

0-3: Time to make some changes





PEOPLE & CULTURE

We have a great culture.

☐ Yes ☐ No

We have current role descriptions.

☐ Yes ☐ No

We provide regular training.

☐ Yes ☐ No

We have the right people in the right seats.

☐ Yes ☐ No

We complete performance reviews.

☐ Yes ☐ No

We have an induction process for new staff.

☐ Yes ☐ No

We have up-to-date employment agreements.

☐ Yes ☐ No

Add up your Yes scores: ____ / 7

6-7: Strong. Keep going

4-5: Needs attention

0-3: Time to make some changes

Total – add Yes scores from all pages: ____ / 42

Final Thoughts

If you want clearer thinking, better decisions, and support to lift performance, we can help. We work alongside owners and leadership teams to bring structure, improve execution, and create momentum. If you are ready to reduce stress, build confidence, and grow a more profitable business, let's talk.

For more info on our Business Builder Programme, which is for business owners with revenue from early stages up to \$5m then click on the link below or contact John on john@planaconsulting.co.nz or 021 748 142



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