

# 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

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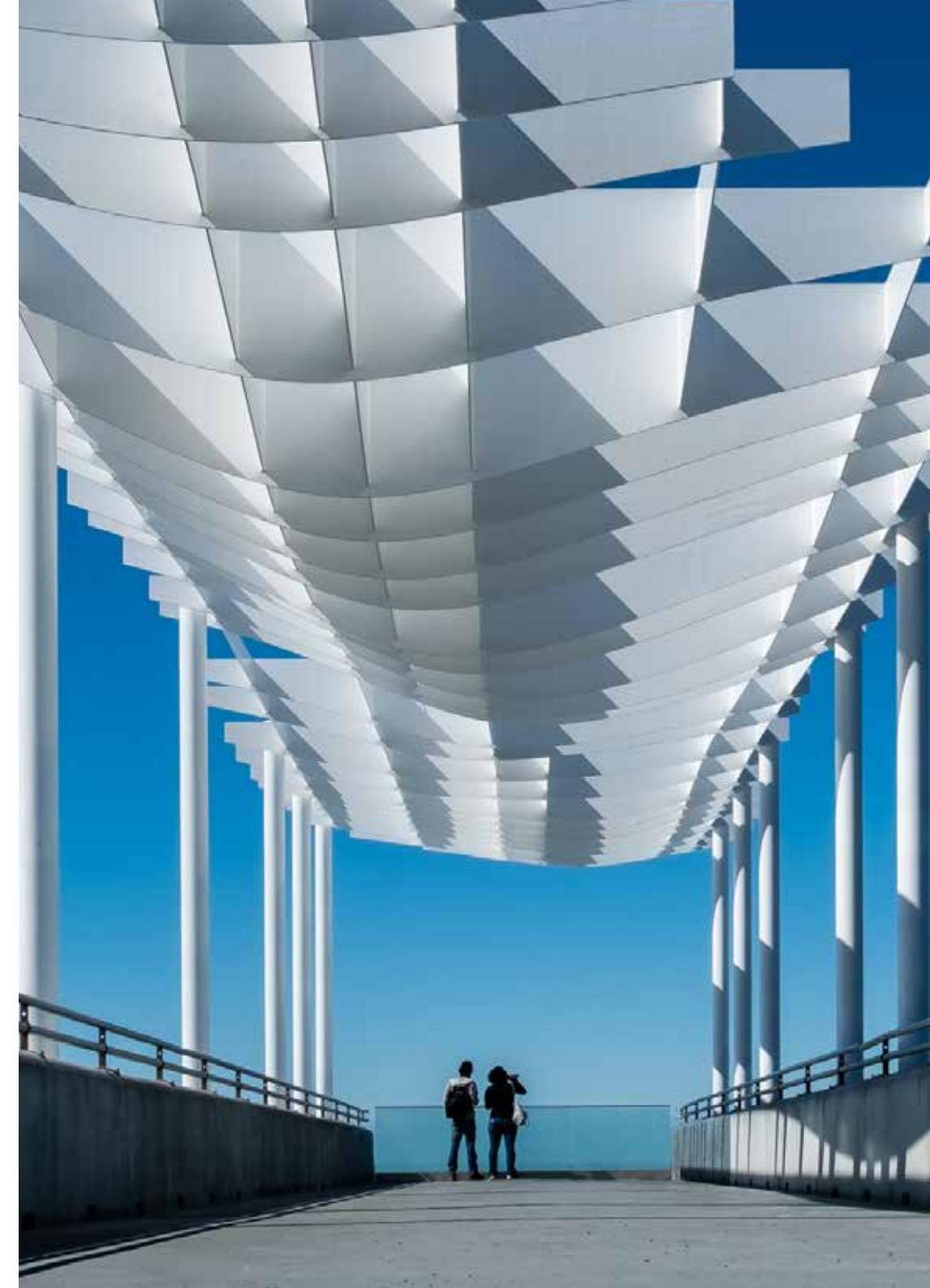
**Add up your Yes scores:    / 7**

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**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

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**Add up your Yes scores:    / 7**

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**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 on a regular basis.**

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

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**Add up your Yes scores:    / 7**

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**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

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**Add up your Yes scores:    / 7**

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**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

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**Add up your Yes scores: \_\_\_ / 7**

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**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

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**Add up your Yes scores: \_\_\_ / 7**

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**6-7: Strong. Keep going**

**4-5: Needs attention**

**0-3: Time to make some changes**

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**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](mailto:john@planaconsulting.co.nz) or 021 748 142**



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