



## Business health check

### How healthy is your business?

We do health checks for our fitness, we do health checks for our cars, we do health checks for our children.

Without an income from a profitable business, would we have the money to do these checks?

### Purpose

The purpose of this tool is to persuade you to spend a short period reviewing some key questions in relation to your business. The hope is that this will encourage you to continue to monitor your motivation and the growth of the business.

If you want to discuss your results with us, you are welcome to contact us at [support@fullviewsolutions.co.za](mailto:support@fullviewsolutions.co.za) or 010 880 4424.

*Tip: Try not to over-analyse: go with your first response as you read the questions*

### 1. What is your “title” in your business?

- Are you a fireman? Running your business reactively by fighting fires all the time?
- Are you an adrenaline junky? Tackle everything new thing with high energy and hope that the problems go away.
- Are you a navigator? Checking your system before hand and looking ahead and planning your next move.

### 2. Do you know how human resources are managed?

- We have a dedicated HR manager and HR/Payroll software.
- Our admin department manages our HR and Payroll on HR/Payroll Software.
- Our admin department manages our HR and Payroll in Excel.

### 3. Are you informed and in charge of your fixed assets?

- We don't have a register or our fixed assets.
- We have a register of our fixed assets but it is outdated.
- We have a register of our fixed assets but do not calculate depreciation.
- We have a register of our fixed assets and we calculate depreciation.

### 4. Do you review financial statements and reports on a regular basis(may select multiple answers).

- I am confident about our cash flow and its predictability.
- I conduct regularly scheduled reviews of our income statement, balance sheet, cash flow statements, budget and other key financial indicators.
- I develop and monitor our annual budget and cash flow plan in accordance with our company plan & vision.
- I make adjustments and communicate with our team based on my regular review and reporting of our company financials.



**5. Do you stick to a clearly defined business plan?**

- Yes, and we review our business plan every 90 days.
- Yes, and we review our business plan annually.
- No, we rarely use or update our business.
- No, we don't have a formal business plan.

**6. How organized are your company's systems and procedures?**

- The company runs like clockwork as a result of highly efficient systems and procedures.
- Some systems and procedures are working but there is still room for improvement.
- The systems and procedures are out of date and need updating to become efficient.
- There are no/very few formal systems and procedures in place.

**7. Which of the following best describes your company's employee systems?**

- We have formal written policies and reviews, although we don't provide training.
- We invest in our employees, providing training as well as formal written systems and policies.
- We use verbal communication and handle situations on an individual basis.
- There is no formally systemized way to educate our people in the aspects of my business.

**8. What delivery and distribution procedures have you implemented for systemizing processes in your business?**

- We don't have any formally systemized delivery or distribution.
- We forecast customer demand to plan for stock movements.
- A complete purchasing and stock receiving system is in place.
- We run paperless delivery and distribution systems.

**9. How do you test and measure the performance of your business?**

- We measure performance on a daily basis and often use quotes.
- We have multiple measurable goals/plans that are calculated and divided by time periods.
- We have goals and plans, although we frequently do not evaluate our progress.
- There are no goals/plans. We measure our business success by how much profits go up/down.

**10. What technology procedures have you added to system your business?**

- Operations are mostly computerized and we frequently update with new technology.
- Operations are (for the most part) fully computerized.
- Our technology still works, although it is outdated.
- We have minimal technology in our company.

**11. What procedures or systems do you use to log and track customer interaction?**

- We do not keep any track of customer communication i.e. complaints, compliments or suggestions.
- Each employee keeps track of their own communication with customers.
- We have a network-based document to keep track of customer communication.
- We have a CRM system to manage all customer interaction.

## 12. How do you manage or evaluate your sales staff?

- We do not have any systems in place for sales reports, pipelines and forecasts and do not track any sales staff actions.
- We use a spreadsheet for sales forecasts, reports and pipelines but we do not track any sales staff actions.
- We use a spreadsheet for sales forecasts, reports and pipelines and we track any sales staff actions and communication.
- We have a system for our entire sales process and to track any sales staff actions and communications.

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**Now that you have reviewed the health of your business, think about the questions it has raised for you and answer the following:**

- What are the key things you need to address right now?
- What do you need to address in six months?
- What do you need to address in 12 months?

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