

Proud Consul

Business Audit Workbook

*From Complexity to Clarity:
A Strategic Self-Assessment for Growth-Ready Business Leaders*

1: Introduction

Running and growing a business is a high-stakes endeavor. Whether you are preparing to scale, streamline or secure long-term value, the ability to see clearly across your business is the foundation for strategic success. This workbook gives you a focused, proven framework to assess your current state in:

- Strategy
- Operations
- Finance
- Leadership

adapted from top-tier consulting methods.

Use it as a starting point to:

- Gain control over the haphazard
- Spot inefficiencies and blind spots
- Make smarter, faster decisions
- Prioritize actions that create measurable business value

Let's turn your ambition into a clear, actionable roadmap.

2: How to Use This Workbook

- Be honest with your answers.
- Don't rush – reflect.
- Review with your team if possible.
- Use your results to guide coaching, consulting or self-led actions.

3: Strategic Clarity

Ask Yourself:

1. Is your vision clearly articulated and shared with your team?

2. Do you have strategic goals tied to clear KPIs?

3. Are you aware of key trends and competitors?

Action Steps:

- Draft a one-page Strategic Plan (template on Page 9)

- Hold a monthly strategic review meeting.

Tool Tip: Use a simple OKR (Objectives & Key Results) framework.

4: Operational Structure

Ask Yourself:

1. Do your processes enable higher growth?
2. Are roles & responsibilities documented and understood?
3. Can your business operate without you for a week?

Action Steps:

- Map 3 core processes (sales, delivery, support)
- Use RACI charts to assign roles clearly.

Tool Tip: Use a process mapping tool (like Lucidchart, MS Visio or ARIS process mapping).

5: Financial Visibility

Ask Yourself:

1. Can you see your cash-flow projection for 3 months?

2. Do you know your breakeven point?

3. Are you pricing based on value and cost?

Action Steps:

- Build a basic financial dashboard (or use the template on Page 10)

- Identify your top 3 cost drivers.

Tool Tip: Excel, Google Sheets, or a Power BI dashboard.

6: Team & Leadership

Ask Yourself:

1. Is your team aligned with the company's mission?

2. Do you have regular 1:1s or check-ins?

3. Are you delegating effectively?

Action Steps:

- Hold monthly team alignment sessions.

- Document SOPs for repetitive tasks.

Tool Tip: Use Sharepoint, Notion or Google Docs for living SOPs.

7: Readiness to Scale

Ask Yourself:

1. Could you double your revenue without chaos?

2. Are your systems and people scalable?

3. Do you have data-driven decision-making?

Action Steps:

- Create a scalable org chart for 2x growth.

- Prioritize automation in one core area.

Tool Tip: Monday.com, ASANA or ClickUp.

8: Your Audit Summary

Tally your YES answers:

13-15: You're well-positioned to scale strategically. Focus on fine-tuning

9-12: You've got potential. Strategic fixes will create leverage.

< 9: It's time for clarity. Start with a consulting session

- ### Business Goals (Top 3):

1. Goal1:

2. Goal2:

3. Goal3:

Target Customer Profile:

Core Offerings:

Key Metrics (KPIs):

Top 3 Priorities This Quarter:

10: Financial Dashboard Template (Starter)

Metric	unit	Target	Actual	Notes
Monthly Revenue				
Gross Margin %	%			
Operating Costs				
Cash Flow Forecast (90 days)				
Customer Acquisition Cost				

 Next Step:

Would you appreciate help reviewing this audit or designing your action plan?

Book your FREE Business Clarity Call now at www.proud-consul.com

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