

Business Clarity Checklist

15 Quick questions to help you Gain Control and Grow Smarter

Why this checklist?

If you are like most entrepreneurs or business leaders, you have had moments of doubt:

- “Where is my time or money going?”
- “Why does growth feel so chaotic?”
- “Am I really in control—or just reacting?”

This checklist gives you a fast and honest snapshot of how your business is doing across

- Strategy
 - Operations
 - Finance:
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Instructions

Go through each question and simply check off the ones where you can confidently say YES.
Be honest — this is only for you.

Section 1: Strategic Direction

1. ☐ We have a clear business vision — not just in my head but shared with my team.
 2. ☐ We know exactly who our ideal customer is and what problem we solve for them.
 3. ☐ Our top goals for this year defined and reviewed at least monthly.
 4. ☐ We make decisions based on a plan — not just gut feeling or urgency.
 5. ☐ We regularly step back from operations to think big-picture.
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Section 2: Operational Control

6. ☐ I know how our key business processes work — and where they break down.
 7. ☐ Tasks and responsibilities are clearly defined across the team.
 8. ☐ We use tools or automation to avoid repetitive manual work.
 9. ☐ We spot bottlenecks early and solve them — not just “put out fires.”
 10. ☐ Our team has the structure it needs to grow (or scale back) smoothly.
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Section 3: Financial Confidence

11. ☐ I have a clear view of our monthly cash flow and runway.
12. ☐ I know which products or services are the most profitable.
13. ☐ We track key metrics (e.g., sales, margin, costs) monthly and use them to guide decisions.
14. ☐ We have pricing that reflects value and keeps us profitable.
15. ☐ I know how much we can afford to invest in growth, people or systems.

Your Score:

13–15 YES answers: You are ready to Scale

You have built a strong foundation. With expert fine-tuning, you can grow faster, more profitably and with less stress.

[Book a free Strategy Session](#)

9–12 YES answers: Strong start but Gaps Remain

You are on the path — but you may be working harder than necessary. Fixing few blind spots could unlock serious momentum.

[Schedule a review call](#)

8 or fewer YES answers: You are Leading in the Dark

You are moving but without enough clarity. The good news? That is fixable — fast.

[Book a free Business Clarity Call and we will create a step-by-step game plan](#)

Ready to Turn Insight into Action?

Book your free 30-minute Clarity Call to:

- Review your checklist
- Identify your top 1–2 priorities
- Get expert guidance on what to do next