

WELCOME TO YOUR MINI BUSINESS AUDIT WORKSHEET

Before you grow, you need to know where you stand.

This worksheet is designed to help you step back from the day-to-day and take a clear, honest look at your business. By reviewing the key areas that keep your operations running — from finances and systems to client experience and growth opportunities — you'll gain the clarity you need to make confident, intentional decisions moving forward.

Think of this as a pulse check for your business. It's quick, practical, and deeply valuable — whether you're planning for a new year, a new quarter, or simply want to understand what's working (and what's not) before taking your next big step.

Use this worksheet to:

- Identify gaps in your systems and workflows
- Spot opportunities to improve efficiency and profitability
- Refocus your time and energy on what truly drives growth

Clarity is the first step toward growth — and this simple audit is here to help you find it.

BUSINESS AUDIT WORKSHEET

Financial Health

How well do you understand and manage the money side of your business?

Checklist:

- ☐ I know my monthly revenue
- ☐ I track my expenses consistently
- ☐ I know my profit margin
- ☐ I regularly review financial reports
- ☐ I feel confident in my pricing structure

Reflection:

What's working well financially?

Where do you see room for improvement?

BUSINESS AUDIT WORKSHEET

Systems & Operations

Are your behind-the-scenes processes supporting growth — or slowing you down?

Checklist:

- ☐ I have clear systems for recurring tasks (invoicing, onboarding, etc.)
- ☐ My workflows are documented and repeatable
- ☐ I'm using tools that make my work easier
- ☐ I know exactly what happens when a new client signs on
- ☐ I don't waste time on disorganized admin work

Reflection:

Where are you losing time or energy?

What's one system you could improve or create?

BUSINESS AUDIT WORKSHEET

Clients & Customer Experience

How well are you serving your clients — and how do they feel working with you?

Checklist:

- ☐ My onboarding process is clear and seamless
- ☐ Clients know what to expect when they work with me
- ☐ I consistently ask for feedback and use it to improve
- ☐ I have processes to retain or re-engage past clients
- ☐ My client communication is timely and professional

Reflection:

What's one thing you could do to elevate your client experience?

BUSINESS AUDIT WORKSHEET

Marketing & Visibility

Is your business consistently visible to the people who need you most?

Checklist:

- ☐ I have a clear brand message
- ☐ I consistently show up on at least one marketing channel
- ☐ My offers are clear and easy to understand
- ☐ I have a plan to attract new leads
- ☐ My online presence reflects my brand

Reflection:

Where are you strongest in marketing right now?

Where do you want to grow your visibility?

BUSINESS AUDIT WORKSHEET

Vision & Growth

Is your business aligned with your bigger goals — or are you just keeping up?

Checklist:

- ☐ I have clear goals for the next 3–6 months
- ☐ I know what I want my business to look like 1 year from now
- ☐ My current offers support my long-term goals
- ☐ I have a plan for scaling sustainably
- ☐ I feel aligned with the direction my business is heading

Reflection:

What does success look like for you in the next year?

What's one step you can take this month to move closer to that vision?

BUSINESS AUDIT WORKSHEET

Summary & Next Steps

What are 3 key insights you gained from this audit?

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

What's 1 action you will commit to in the next 30 days?

Clarity is the first step to growth. Use what you've uncovered here to focus your time, refine your systems, and make decisions that move your business forward — one step at a time.

woodlandbusinesssolutions.com | [@woodlandbusinesssolutions](https://www.instagram.com/woodlandbusinesssolutions)