



THE BIG PICTURE CHECKLIST

Fall Back in Love With Your Business

A comprehensive diagnostic tool for established business owners who want to transform their business from a source of stress to a source of freedom.

Better Business Health Check

Instructions: This checklist is designed for established businesses (2+ years in operation). Rate your business on each question from 1-5 (1 = Strongly Disagree, 5 = Strongly Agree). Be brutally honest—this is meant to help you identify exactly where your business is struggling.

SECTION 1: LEADS & MARKETING

1. I have consistent leads coming in WITHOUT constantly worrying about marketing

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

2. My business leverages MULTIPLE marketing channels (beyond just Google and Facebook)

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

3. My business has a strong online reputation with plenty of positive reviews

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

4. I have a SYSTEM for generating referrals that doesn't rely on luck or random word-of-mouth

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

5. I know exactly which marketing activities produce the highest ROI for my business

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

Pain Point Check: If you scored low here and your business is 2+ years old, something is fundamentally wrong with your marketing approach. Most businesses should have established reliable lead sources by the 2-year mark.

SECTION 2: BUSINESS VS. SELF-EMPLOYMENT

6. I could take a 4-week holiday without my business falling apart

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

7. My business has documented SYSTEMS that others can follow without my input

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

8. I have PEOPLE in place who handle day-to-day operations without my constant supervision

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

9. My business generates revenue even when I'm not working directly with clients

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

10. I spend the majority of my time working ON my business rather than IN it

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

Pain Point Check: Low scores here indicate you're self-employed, not a business owner. You've created a job for yourself rather than a business that works for you. A proper business is built on systems and people.

SECTION 3: PERSONALITY & HATS

11. I know my Wealth Dynamics profile and focus primarily on tasks aligned with my natural strengths

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

12. I've identified which activities drain my energy and have delegated or systematised them

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

13. I recognise that I CAN'T be excellent at all aspects of my business

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

14. I've stopped trying to wear all the hats in my business

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

15. My team members have complementary personality profiles to mine

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

Pain Point Check: Low scores indicate you're trying to do everything yourself or forcing yourself to do tasks that don't align with your natural strengths. This is a recipe for burnout and mediocrity.

SECTION 4: THE FOUR BUSINESS AREAS

16. MARKETING: I have a clear strategy that consistently brings in ideal clients

Strongly Disagree 1 2 3 4 5 Strongly Agree

17. SALES: I have a defined sales process that converts leads at a rate of 25% or higher

Strongly Disagree 1 2 3 4 5 Strongly Agree

18. OPERATIONS: My core service delivery is systematised and doesn't require my constant involvement

Strongly Disagree 1 2 3 4 5 Strongly Agree

19. ACCOUNTING: I have systems for consistent cash flow, timely invoicing, and financial tracking

Strongly Disagree 1 2 3 4 5 Strongly Agree

Pain Point Check: Identify which area scored lowest. This is your immediate priority. Most business owners excel in one or two areas but neglect the others, creating bottlenecks.

SECTION 5: PRICING & CLIENTS

20. I charge based on the VALUE I provide, not just time or market rates

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

21. I regularly INCREASE my prices and rarely lose clients as a result

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

22. I know EXACTLY why I charge what I charge (and it's not based on competitors)

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

23. I have ENOUGH clients and don't feel desperate to take on anyone who calls

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

24. I feel CONFIDENT stating my prices without apologising or offering discounts

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

Pain Point Check: Low scores indicate your pricing is likely based on insecurity or vague market understanding rather than true value. Your pricing reflects your beliefs about yourself and your business.

SECTION 6: FINDING THE RIGHT TEAM

25. I've stopped trying to find people who work "exactly like me"

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

26. I hire based on specific PROFILES for specific PROBLEMS (not general roles)

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

27. I've created clear systems for onboarding and training new team members

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

28. I trust my team to make decisions without my constant approval

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

29. I focus on OUTCOMES rather than micromanaging HOW my team works

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

Pain Point Check: Low scores reveal why you're struggling with hiring—you're looking for clones instead of complementary team members who excel where you don't.

SECTION 7: FALLING BACK IN LOVE

30. I remember and connect with my original PASSION for starting this business

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

31. My business SUPPORTS my life rather than consuming it

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

32. I feel ENERGISED by my business most days (not drained)

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

33. I'm PROUD of what my business has become

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

34. I would choose this business again if starting over

Strongly Disagree (1) (2) (3) (4) (5) Strongly Agree

Pain Point Check: This section reveals if you've fallen out of love with your business. Low scores indicate it's time for fundamental changes in how your business operates.

SCORING YOUR BUSINESS HEALTH CHECK

140-170 points: Congratulations! Your business is working for you rather than the other way around. You've built a true business rather than just buying yourself a job.

100-139 points: Your business has good elements but likely has specific areas needing urgent attention. Focus on your lowest-scoring section immediately.

70-99 points: You're experiencing the classic entrepreneurial trap—working harder than an employee would for potentially less reward. Your business needs significant restructuring.

Under 70 points: You've created a job, not a business. You're likely experiencing burnout, financial stress, and questioning why you even started this journey.

PAIN POINT DIAGNOSIS & NEXT STEPS

- 1. If you scored lowest in Section 1:** Your marketing is too narrow or ineffective. Expand beyond digital ads into networking, partnerships, and referral systems.
- 2. If you scored lowest in Section 2:** You haven't built a real business yet. Start documenting processes and hire based on your weakest areas first.
- 3. If you scored lowest in Section 3:** Take the Wealth Dynamics profile test and stop trying to be good at everything. Focus only on your natural strengths.
- 4. If you scored lowest in Section 4:** Identify which of the four areas (Marketing, Sales, Operations, Accounting) is your weakest and either systemise it or hire someone with that strength.
- 5. If you scored lowest in Section 5:** Your pricing structure reflects deeper issues with self-worth or market understanding. Raise your prices by at least 10% immediately.
- 6. If you scored lowest in Section 6:** Stop looking for clones and start looking for complementary personalities. Hire for specific problems, not general help.
- 7. If you scored lowest in Section 7:** Revisit why you started this business and make immediate changes to eliminate what you hate doing most.

Remember: After 2+ years in business, you should have validated your concept and established reliable systems. If you're still struggling with the basics, it's not about working harder—it's about fundamentally changing your approach.

Bring your completed checklist to our next Elevate workshop for personalised guidance on transforming your specific pain points into opportunities.

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