



Driving Growth with Data & Strategy

THE SME OPERATIONS HEALTH CHECK



Your **Business** Needs
Automation, Better **Data**
& Smarter **Strategy**

A **FREE** Diagnostic Checklist For SME Owners,
Founders & Operations Leaders

How Do You Know If Your Business Systems Are Actually Working For You Or Quietly Holding You Back?

Most business owners feel it: a vague sense that things take longer than they should, that reports are never quite right, that decisions are made on gut instinct rather than real data. But because the problems are gradual, they rarely trigger alarm bells until something goes wrong.

This checklist exists to surface slow leaks, operational gaps, automation blind spots, and strategy misalignments before they cost you real time, money, and growth.

Work through each section honestly. Tick any statement that describes your business right now. At the end, tally your score to see where you stand and what to do next.

There Are No Right Or Wrong Answers Here. This Is A Diagnostic Tool, Not A Test.

How To Use This Checklist

Go through each section. Check the box for every statement that is currently true for your business, even partially. Be honest: partial truths count.

At the end of each section, note your score. Then add everything together for your Overall Health Score and use the scoring guide at the back to understand what it means.

Plan to revisit this checklist every 90 days. As your business evolves, your score should improve, and this document becomes a living record of your operational progress.

SECTION 1: Data Management & Record Keeping

Are Your Records Structured, Accessible And Reliable?

- ☐ We still use paper forms, notebooks, or printed registers for core business data. *This includes customer records, attendance, orders, job sheets, or any operational log.*
- ☐ We store important information in physical files that can only be accessed in one location.

- ☐ Our business data lives across multiple spreadsheets with no central master record.
For example: one spreadsheet for clients, another for invoices, another for staff, but none linked.
- ☐ Different team members hold different versions of the same data.
Conflicting records cause regular confusion or rework.
- ☐ We have lost important data in the past due to a lost file, broken device, or staff departure.
- ☐ It is difficult to find a specific record quickly when we need it during a meeting or client call.
- ☐ We have no consistent naming convention or folder structure for digital files.
- ☐ New staff struggle to find information because our filing is not clearly organised.

Section 1 Score: _____ / 8

SECTION 2 : Reporting & Business Visibility

Can You See What's Happening In Your Business Right Now?

- ☐ We do not have a live dashboard or central view of our key business metrics.
- ☐ Preparing a management report takes hours, or even days of manual work.
- ☐ We only find out about a problem (customer, financial, operational) after it has already escalated.
- ☐ We cannot easily answer questions like: 'What was our revenue this week?' or 'How many active clients do we have?' without digging through spreadsheets.
- ☐ Our leadership team does not review consistent performance metrics regularly (weekly or monthly).
- ☐ We have data but don't know how to turn it into insights that actually inform decisions.
- ☐ Our financial reports are produced by our accountant weeks after the reporting period.
We don't have a real-time view of cash flow, income, or expenses.
- ☐ We have never mapped out our key performance indicators (KPIs), or we track them inconsistently.

Section 2 Score: _____ / 8

SECTION 3 : Systems & Automation

Are Your Workflows Efficient Or Powered By Repetition And Manual Effort?

- ☐ We send the same type of emails manually, repeatedly: such as booking confirmations, follow-ups, or reminders.
- ☐ Onboarding a new client or customer involves a long series of manual tasks that could be automated.
- ☐ We copy data from one system into another regularly (e.g. from a form into a spreadsheet or CRM).
- ☐ We do not use a CRM to manage our customer or client relationships.
All contact is tracked via email, WhatsApp or memory.
- ☐ Our CRM (if we have one) is outdated, incomplete, or barely used by the team.
- ☐ We spend significant staff hours each week on tasks that are repetitive and rule-based.
- ☐ We have no automated alerts or triggers when something important happens, such as a missed payment, a new lead, or an overdue task.
- ☐ We have considered automation tools, but don't know where to start or which ones to use.

Section 3 Score: _____ / 8

SECTION 4 : Business Strategy & Planning

Is Your Business Operating To A Clear, Evidence-Based Plan?

- ☐ We do not have a written business strategy or growth plan for the next 12 months.
- ☐ Our day-to-day decisions are made on gut instinct rather than data or defined objectives.
- ☐ We do not conduct regular reviews (quarterly or annually) to assess whether we are meeting our goals.
- ☐ We have not clearly defined what makes us different from our competitors.
- ☐ Our team is unclear on the company's priorities for this year.
- ☐ We have not identified our most profitable service or customer segment using data.
- ☐ We lack a clear process for turning new ideas into tested, implemented improvements.

Section 4 Score: _____ / 7

SECTION 5 : People, Processes & Change

Are Your Team And Culture Set Up For Modern, Digital Ways Of Working?

- ☐ We do not have documented Standard Operating Procedures (SOPs) for our most common tasks.
- ☐ When a staff member leaves, we lose significant institutional knowledge that is not written down.
- ☐ Training new staff takes a long time because our processes are not standardised.
- ☐ Our team resists or struggles to adopt new tools or ways of working.
- ☐ We do not track staff performance or productivity using measurable metrics.
- ☐ Responsibilities and task ownership are unclear, leading to things being missed or duplicated.
- ☐ We have no formal onboarding process for new clients, customers, or employees.
- ☐ Our communication tools (email, WhatsApp, shared drives) are fragmented and hard to manage.

Section 5 Score: _____ / 8

Your Health Score — What Does It Mean?

Add Up Your Scores From All Five Sections:

Total Score: _____ / 39

0 - 8

Strong Foundation — Your systems are relatively healthy. Focus on refining, optimising and scaling what's working.

9 - 18

Developing Systems — You have some good foundations, but clear gaps that are costing you time and visibility. Targeted improvements will have a significant impact.

19 - 28

Urgent Attention Needed — Multiple areas of your business are creating friction, risk, or inefficiency. A structured improvement plan is needed now.

29 - 39

Critical — Your current systems are actively limiting your growth, compliance, and decision-making. A full operational review is strongly recommended.

What To Do With Your Results

This Checklist Is The Starting Point :The First Honest Conversation Between You And Your Business. Here Is What To Do Next, Depending On Your Score.

If You Scored 0 – 8:

Your foundations are solid. Focus on identifying your highest-leverage improvement and working on one optimisation at a time. Use your retained checklist to measure progress quarterly.

If You Scored 9 – 18:

You have clear opportunities to save time and improve decision-making. Consider starting with a CRM implementation or dashboard project. A CrownKonsult Diagnostic Health Check would give you a precise action plan within 1-2 days.

If You Scored 19 – 28:

Multiple systems need attention. The good news: fixing the right two or three things first creates a cascade of improvements. Book a free 30-minute consultation with CrownKonsult to prioritise your roadmap.

If You Scored 29 – 39:

Your business needs a structured transformation plan — not just a tool or quick fix. A full operational audit will identify the root causes, sequence the work, and give you a realistic path to a digital-first business. This is exactly what CrownKonsult was built to deliver

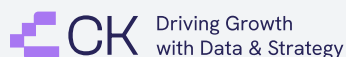
Use This Checklist Again In 90 Days

Your Score Today Is Your Baseline. Save This Document And Revisit It In 90 Days After Implementing Any Improvements. Track Which Boxes You Can Remove. A Rising Score Reflects A Growing, More Efficient Business.

We Suggest Sharing This With Your Leadership Team Or Operations Lead As A Shared Accountability Tool. Document The Improvements You Committed To, Who Owns Them, And Your Target Completion Date.

My 90-Day Commitment: By [Date], I Will Address The Following Three Gaps From This Checklist:

1. _____
2. _____
3. _____



Ready To Take Action?

Book **A Free 30-Minute** Consultation Or Request A Diagnostic Health Check.

We Will Review Your Results, Prioritise Your Gaps, And Propose A Clear Path Forward.

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Monday – Friday,
9:00 – 17:00

