



# Business Audit

*To optimize your business  
to reach your goals of financial success,  
personal fulfilment and greater impact*

First and Last Name

Month, Year

# Introduction

You are about to fill out your Business Audit Document.

This Audit will allow us to

- have a general Business Overview
- have more information on your existing clients
- have more information on your Marketing

You will be asked to answer questions as honestly and truly as possible, as it is in your interest that it represents the true state of your business so that we could customise an action plan that will match exactly where you are today with your business.

Based on your Business Audit, we will suggest which areas in your business need the most attention, and we will go over it together in our first Strategy Session, in order to plan your next “90 days Goal Plan” with your priority projects.

This Business Audit will help us also throughout our work together to know what we should focus on and what should be your priorities.

In any case, you can be assured that this information will not be shared with anyone and that all it will, of course, stay confidential.

Good luck!

Nathalie

# Business Overview

In this section please don't hold anything back. Provide a complete overview of your business by answering the questions openly and honestly.

**Give us a short description of what your business is about today?**

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**What services are you offering today?**


**What are your core values?**


**As of today, what is working very well in your business (3 main, with the best on top)**


**What are the 3 main challenges that you are facing today (with the worst on top)?**


**What have you already tried to do to solve those challenges and how did it work?**


**Who is your Target Market today?**


**What are their pain points?**


**Where do you see yourself and your business in the short, mid and long term?**

	Short Term:
	Mid Term:
	Long Term:

**Ideal Scenario - What would your ideal business look like and how would that make you feel?**

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# Your Clients & Sales

In this section, we want to know how many clients you have and what is your offering today

**How many clients do you have today?**

	<i>In the beginning</i>
	<i>today</i>

**What is the service that you are offering them?**


**How much are they paying?**


**What is your average revenue?**

	<i>Per client</i>
	<i>Per month</i>

# Your Marketing

In this section, we will analyse how you do Marketing and how you bring new clients to your business. We know that this is a work in progress, and we want to evaluate what you are already doing so we can see what's missing.

**What is your branding today** (*logo, business cards, website, newsletter, presence in social media*)

	<i>What is it today?</i>
	<i>Where would you like to be?</i>

**What Social Media Platforms are you active on and how?**

	<i>Social Media Platforms?</i>
	<i>How active are you?</i>

**Where do you get new leads from?** (*New Lead Generation*)

	<i>What is it today?</i>
	<i>Where would you like to be?</i>

**How do you follow up with existing leads?** (*Nurturing existing Leads*)

	<i>What is it today?</i>
	<i>Where would you like to be?</i>

**How many contacts do you have in your list** (*Do you have a list created, do you use a Mailing tool*)

	<i>What is it today?</i>
	<i>Where would you like to be?</i>

**How do you communicate with your leads** *(Do you have a newsletter, do you use social media, other tools?)*

	What is it today?
	Where would you like to be?

**How do you convert leads into clients?** *(Sales process , Proposal and Prospect follow up)*

	What is it today?
	Where would you like to be?

**Do you have Strategic Partners?** *(partnerships, sponsorships)*

	What is it today?
	Where would you like to be?

**Any other comments or information you wish to share with us that is not in the Audit**

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**- The end -**