

BUSINESS GROWTH ASSESSMENT TOOL





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INTRODUCTION TO THE BUSINESS GROWTH ASSESSMENT TOOL

Growing a business isn't just about working harder—it's about working smarter. The Business Growth Assessment Tool is designed to help leaders take a clear, honest look at what's driving growth and what might be holding it back. Instead of relying on assumptions or one-off successes, this tool gives you a structured framework to evaluate your business across all the critical factors that impact long-term performance.

The assessment covers leadership, strategy, sales, operations, financial management, and human resources, along with other cultural and organizational factors. Each section asks tough, practical questions that reveal where the business is strong, where it's vulnerable, and where opportunities for improvement lie. By rating your organization on a consistent scale, you gain not just insights but also a roadmap for targeted growth initiatives.

What makes this tool powerful is its practicality. It doesn't just point out challenges—it helps you prioritize them, so you can focus on the issues that will make the biggest difference. Whether it's sharpening your leadership focus, strengthening financial controls, or building a more resilient team, the Business Growth Assessment Tool helps turn reflection into action.

At the end of the day, this tool isn't about criticism—it's about clarity. It's a way to align leadership, set priorities, and commit to meaningful changes that fuel sustainable growth.

INSTRUCTIONS:

For each statement below, rate your organization on a scale from 1 to 5, where 1 indicates strong disagreement or non-existence of the issue, and 5 indicates strong agreement or a prevalent issue. Use this assessment to identify areas that may require attention to facilitate growth.



SCALE DEFINITIONS:

- ▶ 1 – Strongly Agree ▶ 2 - Agree ▶ 3 – Neutral ▶ 4 - Disagree
▶ 5 – Strongly Disagree ▶ N/A – Don't Feel Qualified To Answer

LEADERSHIP FACTORS

Statement	1	2	3	4	5	N/A
Our leaders lack a genuine passion for growth and often fail to lead by example.						
Leadership focus in our organization is scattered or inconsistent.						
Our leadership team is insular and has a limited circle of influence.						
Excessive hierarchical structures hinder our agility and innovation.						
Our leadership is risk-averse, stifling necessary experimentation and calculated risks.						
There is poor coordination and collaboration among our leadership team.						
Leadership meetings focus more on reporting than problem-solving or identifying opportunities.						
There is insufficient constructive conflict around important decisions.						
Our leaders lack a comprehensive understanding of the key drivers of value in our business.						

Statement	1	2	3	4	5	N/A
Leadership communication is one-way, limiting valuable feedback and input from the team.						
Key leadership personnel lack curiosity or are minimally informed about critical matters.						
Leaders and managers show disinterest in upward feedback.						
The organizational chart is not viewed as a dynamic and evolving document.						
There is a lack of clarity on what success means at both the macro and micro levels.						
Leaders act primarily as managers instead of visionary leaders.						
Organizational culture is treated as an afterthought rather than a strategic asset.						
Comfort and complacency are obstacles to our progress.						
Leaders are unwilling to confront harsh business realities and excessively rely on positive messaging.						
Leaders neglect their own professional development and that of their key leadership staff.						
No. Of Responses						

TOTAL AVERAGE:



STRATEGIC FACTORS

Statement	1	2	3	4	5	N/A
Our organization often forgets the basics: Vision, Mission, and Values.						
Strategic planning is treated as an event rather than an ongoing management tool.						
There is a lack of awareness and alignment with external market realities such as industry and market trends.						
We lack strategic decision-making filters.						
There is limited or no focus on competitor intelligence.						
Our client and product diversification is insufficient.						
We are slow to adapt and fail to pivot based on external market realities.						
We rely on industry trends rather than actively creating competitive advantages.						
Investment in research and development (R&D) and innovation is minimal or nonexistent.						
We treat assumptions as facts without verifying their validity.						
Data analytics are underutilized for informed decision-making.						
We believe that what led to past success will automatically lead to future success.						
No. Of Responses						

TOTAL AVERAGE:

BUSINESS DEVELOPMENT/SALES FACTORS

Statement	1	2	3	4	5	N/A
There is an inadequate understanding or leverage of the client value proposition.						
We underinvest in business development activities.						
Business development approaches are reactive rather than proactive (inbound vs. outbound).						
Sales management efforts are limited or ineffective.						
We hire salespeople at lower compensation rates, undervaluing sales talent.						
The ROI of marketing initiatives is not sufficiently validated.						
Upselling opportunities are often neglected.						
There is over-optimism about sales pipeline close rates.						
Our customer relationship management (CRM) system is poorly functioning or underutilized.						
We maintain client loyalty despite minimal business benefits.						
Effective two-way communication with clients regarding service needs and product/service innovations is lacking.						
No. Of Responses						

TOTAL AVERAGE:



OPERATIONS FACTORS

Statement	1	2	3	4	5	N/A
We lack a coherent and consistent management philosophy.						
Management reporting systems to ensure accountability are minimal or nonexistent.						
There is an overreliance on a few individuals within the organization.						
Our management span of control model has issues.						
We focus on the wrong Key Performance Indicators (KPIs) or do not have appropriate KPIs at all.						
Manager performance is inconsistent and sporadic.						
There is a micromanagement mindset instead of empowering employees.						
Processes are emphasized excessively, stifling individual initiative.						
Our quality control practices are poor.						
We fail to push back on client scope creep.						
Solutions to address problems rely on quantity rather than quality.						
There is a lack of innovation to drive productivity improvements.						
Debriefing of successes and failures for organizational learning is insufficient.						
Our organization is becoming less efficient and difficult to do business with both internally and externally.						
There is a lack of operational redundancy leading to single points of failure.						

Statement	1	2	3	4	5	N/A
Succession planning is minimal or nonexistent.						
Knowledge management tools and/or maintaining a learning management system are neglected.						
There is resistance to digital transformation efforts.						
No. Of Responses						

TOTAL AVERAGE:



FINANCIAL MANAGEMENT FACTORS

Statement	1	2	3	4	5	N/A
We emphasize internal factors rather than external market dynamics, resulting in excessive overhead and inadequate sales focus.						
Contingency plans for different financial scenarios are not developed, and specific budgetary triggers to drive action are lacking.						
Budgeting is static instead of flex budgeting, or there is no budgeting at all.						
Cash flow management practices are poor.						
Working capital is inadequate to support growth initiatives.						
Backlog or work-in-progress (WIP) are poorly managed.						
Debt levels are inappropriate or excessive.						
Our Line of Credit (LOC) is insufficient relative to the size of the business.						
Communication with the bank when facing financial challenges is ineffective.						
There is a lack of financial sophistication internally, or we rely too much on external expertise.						
Forecasting tools are underutilized.						
Estimating and pricing practices are inaccurate.						
Significant Accounts Receivable (A/R) issues are responded to slowly, allowing the amount owed to accumulate.						
Financial controls are minimal or nonexistent.						
Risk management is given inadequate attention, and proper business protection measures are lacking.						

Statement	1	2	3	4	5	N/A
Financial literacy at all levels of the organization is insufficient.						
We have self-created tax problems.						
Owner lifestyle needs are prioritized over necessary business investments, treating the business as a personal ATM.						
No. Of Responses						

TOTAL AVERAGE:

HR FACTORS

Statement	1	2	3	4	5	N/A
The HR function is underutilized or insufficiently invested in.						
There is an overreliance on hybrid positions instead of committing to specialization.						
The recruiting function underperforms, resulting in lengthy vacancies.						
We are slow to terminate underperforming employees.						
There is a misalignment of people with their roles and responsibilities.						
Compensation is inadequate for attracting and retaining top talent.						
Incentive compensation below the leadership level is minimal or nonexistent.						
Professional development opportunities for supervisors and managers are insufficient.						

Statement	1	2	3	4	5	N/A
Performance management processes are flawed.						
Employee morale receives inadequate attention.						
Employee turnover rates are high.						
Employee onboarding processes are ineffective.						
Labor attorneys dictate business decisions rather than proactively addressing performance issues.						
No. Of Responses						

TOTAL AVERAGE:

OTHER FACTORS

Statement	1	2	3	4	5	N/A
Different rules for family members and friends compromise fairness and objectivity.						
Mistakes are penalized instead of fostering a culture of learning from them.						
A win-lose mindset is adopted rather than nurturing win-win stakeholder relationships.						
Mechanisms to ensure that the truth is conveyed to those in power are absent.						
Greater value is placed on tenure rather than competence.						
The growth requirements of the organization surpass the growth capabilities of the existing staff.						
No. Of Responses						

TOTAL AVERAGE:

ACTION PLANNING SECTION

1. TOP CATEGORY FOR GROWTH

Which category scored the highest overall average?

What action items will you commit to in order to continue strengthening this category?

Action Item 1: _____

Action Item 2: _____

Action Item 3: _____

2. TOP 5 AREAS NEEDING ATTENTION

Identify the five items (across all categories) with the lowest scores.

For each, write one or more specific action steps you will take to address these areas:

1. Area: _____ | Action Item: _____

2. Area: _____ | Action Item: _____

3. Area: _____ | Action Item: _____

4. Area: _____ | Action Item: _____

5. Area: _____ | Action Item: _____