

Holistic Business Coaching - WHEEL OF BUSINESS LIFE QUESTIONNAIRE

Name: _____

Phone Number: _____

Email: _____

Tick each box where you can answer yes to the question. As much as possible give a yes or no answer so that they can be scored. Score your self out of 10 for each section. Then mark your score on the accompanying diagram along the line for each area. Join the dots and get a graphic overview of the balance of your business. Those areas that are weakest may need some attention.

Vision and Direction

Score /10

- I have a clear idea of what my business is about.
- I have a clear idea of where I want to take my business.
- I know what direction I am headed in and what I need to do to get there.
- I have a vision statement that clearly states what my business is about.
- I know what sets my business apart from others.
- I have a detailed business plan (SWOT) analysis.
- My business vision is aligned with my personal vision.
- I have established clear goals to achieve my vision.
- I write my goals down & regularly review and revise them.
- My business vision fills me with passion, joy and enthusiasm.

Staff and Communication

Score /10

- I have open and honest communication with all my staff.
- I have regular staff meetings with the staff.
- The staff are all committed and loyal.
- Staff contribute to decision making.
- When staff problems occur, they are solved easily and quickly.
- Staff productivity is high.
- Staff are willing and able to take responsibility.
- Staff are aware of the business vision.
- Staff work as a team and all work towards a common goal.
- I have incentives so that staff are rewarded and encouraged, along with regular performance reviews.

Financial

Score /10

- I have a good recording system for finances.
- I have an annual budget and cashflow forecast by month.
- I have regular monthly reports tracking against budget.
- Sales are steady or increasing.
- Profitability is steady or increasing.
- Customers pay promptly and action taken quickly if not.
- Suppliers are regularly reviewed for best terms and deals.
- Costings are accurate and up to date.
- Overheads are not excessive.
- Tax payments are planned and managed.

Marketing

Score /10

- I have a clear idea of my niche market.
- I know what this market needs.
- I know how to appeal to this market.
- I know how to address the needs of the niche market.
- I have a database of customers and use it for direct marketing.
- My marketing and advertising material is up to date and professional.
- I have an up to date and easily used website.
- People can order online through my website.
- My marketing plan is formalized and documented.
- My marketing plan and the outcomes are reviewed and updated.

Time Management

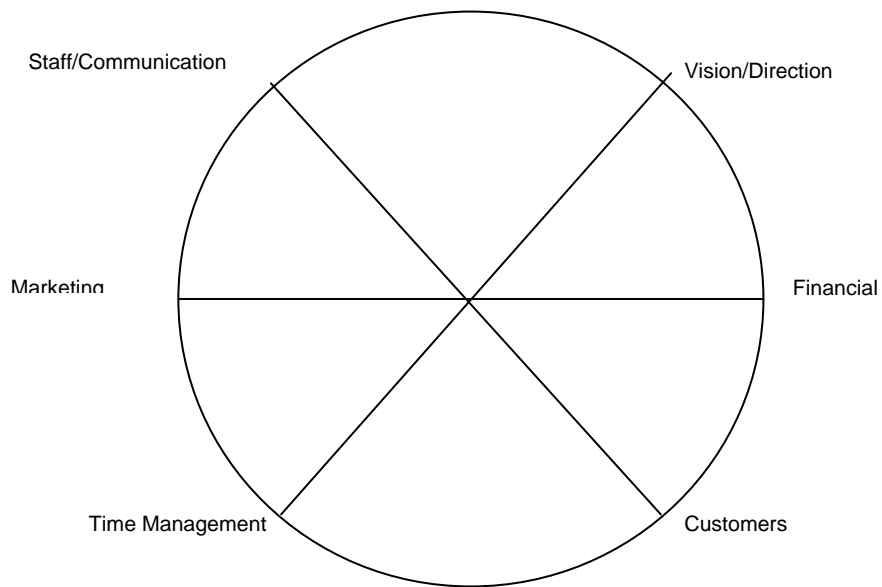
Score /10

- I have a balanced life/work ratio.
- I am happy with the hours that I work on the business.
- I prioritise my time well.
- I always work on the important things first.
- I always have time for relaxation.
- I always have time for exercise.
- I find delegating easy.
- I use a diary.
- I plan my week.
- I know my most productive time of day to work.

Customers

Score /10

- My customers are loyal and long standing.
- My customers are valued and know they are appreciated.
- Customers always pay on time.
- We rarely have customer complaints.
- I regularly keep in touch with customers.
- I provide rewards for loyal customers.
- Our systems are customer friendly.
- I do regular customer surveys.
- Customers value our service.
- Our customers are treated as VIP's.



The outer rim of the wheel represents 10/10, the inner spoke is 0/10.