APPENDIX WORKSHEET

The Business Health Check

YOUR COUNTERSTEER	All 12 chapters at once. Score all 36 statements honestly: 1 means not at all true, 5 means completely true.
YOU WALK AWAY WITH	Your three lowest-scoring functions, which are where you start.

YOUR NAME	COMPANY	DATE STARTED

Fill this in on screen or print it. Type in any box and save the file to keep your answers. Don't polish it. Fill in what you know, leave the rest blank, and come back to it. In Adobe Acrobat or Reader, the averages and bands fill in for you as you score.

Infrastructure (Chapter 1)

Statement	Score (1–5)
We have a written business plan that's been reviewed in the last 12 months.	
I can name our top 3 activity drivers, not just our financial results.	
Our org chart reflects who's actually here today, not who was here a year ago.	
Average	

Marketing (Chapter 2)

Statement	Score (1–5)
Any two people on our team would describe our value proposition the same way.	
We know exactly which customer segment is most profitable for us.	
We can point to which of our marketing activities actually produce qualified leads.	
Average	

Sales (Chapter 3)

Statement	Score (1–5)
Our sales process is documented well enough that a new hire could follow it.	
We track close rates and quotes sent, not just total revenue.	
We have a defined process for asking closed customers for referrals.	
Average	

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Vendors & Purchasing (Chapter 4)

Our top vendor relationships are scored against real criteria, not gut feel.	
We use written purchase orders for anything beyond routine, small purchases.	
We have a documented receiving process that catches problems before they become inventory.	
Average	

Operations (Chapter 5)

I know exactly what our single biggest bottleneck is right now.	
Our core processes are written down as standard work, not just "how we've always done it."	
We track on-time delivery as an operational indicator and cost per unit as a financial result, not just whether the month "felt busy."	
Average	

Human Capital (Chapter 6)

We have current, accurate job descriptions for every role.	
Our new hires follow a structured first-90-days onboarding plan.	
We know our turnover rate and can name the top reason people actually leave.	
Average	

Payroll (Chapter 7)

Every worker's classification (employee/contractor, exempt/non-exempt) has been reviewed in the last year.	
Our commission plan is simple enough that a salesperson can calculate their own check.	
We know who owns our payroll filing calendar, by name.	
Average	

Accounting & Finance (Chapter 8)

I review our cash flow statement as closely as our income statement.	
We know our days sales outstanding and track them regularly.	
Our invoices go out accurately the first time, without routine corrections.	
Average	

Information Systems (Chapter 9)

I could list every software system we run without opening anything.	
Our key systems (CRM, POS, accounting) actually share data automatically.	
We know the difference between an IT problem and an IS problem when something breaks.	
Average	

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Safety (Chapter 10)

We have a real, written safety program specific to our actual hazards.	
Employees report near-misses without fear of getting in trouble.	
Every new hire gets safety training in their first week, not "eventually."	
Average	

Project Management (Chapter 11)

Every new initiative starts with a one-page charter before work begins.	
We keep, and actually review, a risk log for active projects.	
We have a defined process for handling scope-creep requests.	
Average	

Quality Management (Chapter 12)

We have written standard work for our most important, repeated tasks.	
We track defect and rework rates, not just customer complaints.	
Employees are encouraged to flag process gaps, and we actually act on what they flag.	
Average	

Scoring Key

Average score	Maturity band	What it means
1.0 – 2.4	**Ad Hoc**	Running on memory and good intentions. This function depends entirely on one person's remembering to do it.
2.5 – 3.9	**Documented**	A real process exists, but it isn't consistently followed or measured yet.
4.0 – 5.0	**Optimized**	Consistent, measured, and improving on purpose — the goal for every function in this book.

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Summary Table

Copy each function's average, write in its band, then average all twelve. Tick the three lowest. Those three — not the other nine, and not the overall average — are where you start.

Function	Average	Band	Lowest three
Infrastructure			
Marketing			☐
Sales			
Vendors & Purchasing			☐
Operations			
Human Capital			☐
Payroll			
Accounting & Finance			☐
Information Systems			
Safety			☐
Project Management			
Quality Management			☐
Overall business average			

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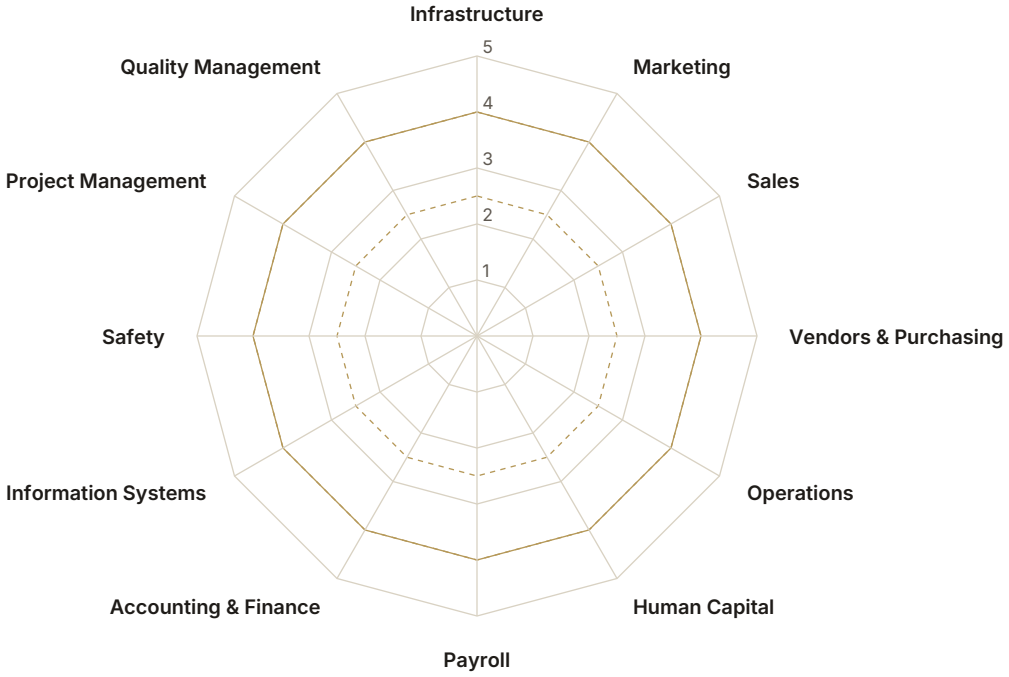
Plot Your Scores

Mark your average for each function on its axis, then connect the dots. Whatever function pulls the shape in closest to the center is your real answer: the one opportunity to improve first.



Dashed gold rings: 2.5 (Documented begins) and 4.0 (Optimized begins). Print this page to plot by hand.

Your biggest opportunity for improvement right now is

One thing I'll do about it this month

The interactive Business Health Check at CountersteerWorks.com scores your answers and draws this map for you. No email required to see your results.

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