

Business Foundation Self-Assessment

Check every statement that is TRUE today. Unchecked boxes = your starting points.

Strategic Steps Consulting, LLC



How to use it: Work through each section honestly — no partial credit. Count your checks per section, then use the scoring guide at the end to pick where to start. Aim to complete this within one week of class while it's fresh.

Section A — Legal Foundation

	Item	Notes / next step
☐	Every active client, vendor, and contractor relationship is covered by a signed written agreement.	
☐	My contracts reflect how I actually deliver today (scope, payment terms, changes, termination).	
☐	My business entity, registrations, and insurance match the current size and risk of the business.	
☐	All licenses, permits, and certifications are current, and every renewal date is on a calendar.	
☐	Key policies (payments, refunds, scheduling, conduct, data handling) are written down.	
☐	Worker classifications (employee vs. contractor) have been reviewed and documented.	
☐	Formation documents, tax filings, and key agreements are organized and retrievable in minutes.	

Section A score: _____ / 7

Section B — Financial Foundation

	Item	Notes / next step
☐	Business and personal finances are fully separate (accounts and cards).	
☐	I review my P&L, cash position, and accounts receivable every month.	
☐	I have a 12-month budget and compare actual results against it.	
☐	I know my profit margin by product/service — and which clients or offers lose money.	
☐	Invoices go out promptly, and overdue payments are followed up on a set schedule.	

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☐	Spending limits and approval rules exist for purchases and large payments.	
☐	I have (or am building) a cash cushion for slow months and surprises.	

Section B score: _____ / 7

Section C — Operations & Systems

	Item	Notes / next step
☐	The business runs for at least a week without decisions bottlenecking on me.	
☐	Our most important recurring processes are written down as simple SOPs.	
☐	Critical know-how is documented — not living in one person's head.	
☐	The same recurring emergencies are NOT happening month after month.	
☐	We have reviewed our task list for what to hire, automate, delegate, outsource, or eliminate.	

Section C score: _____ / 5

Section D — Team & Accountability

	Item	Notes / next step
☐	Every key outcome (sales, delivery, billing, quality) has exactly one accountable owner.	
☐	Each role has written expectations: responsibilities, success measures, and authority.	
☐	We hold a short, regular team check-in on numbers, priorities, and blockers.	
☐	I know which roles the next stage of growth requires — before I urgently need them.	

Section D score: _____ / 4

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Scoring Guide — Where to Start

Total score	What it suggests
18–23	Strong foundation — focus on fine-tuning and preparing the next growth stage.
12–17	Solid but exposed — pick your two weakest sections and work them over the next 60 days.
6–11	Growth will strain the business — stabilize legal and financial basics before adding volume.
0–5	Pause new growth pushes — build the foundation first. Start with Section A, then B.

My grand total: _____ / 23 My first-priority section: _____

Questions? Let's talk about where you're stuck — no pressure, no jargon.

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Call or text: 757-752-9294 · strategicstepsconsulting.com

Schedule your free discovery call — get your roadmap back to growth.



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