



BUSINESS EFFICIENCY SCORECARD

ARE YOU RUNNING YOUR BUSINESS EFFICIENTLY?

As a business owner, you juggle countless tasks every day—but are you focusing on what truly drives growth? Many entrepreneurs get stuck in inefficiencies that slow them down. *This Business Efficiency Scorecard* helps you *identify bottlenecks, uncover hidden gaps, and determine whether it's time to delegate or optimize your operations.*

Use this checklist to assess key areas like productivity, growth, finances, and branding—then take action to streamline and scale your business with confidence!

TAKE THIS SELF-ASSESSMENT TO SEE IF INEFFICIENCIES ARE HOLDING YOU BACK AND WHETHER IT'S TIME TO BRING IN EXPERT SUPPORT.

FOR EACH STATEMENT BELOW, CHECK YES OR NO BASED ON YOUR CURRENT SITUATION.

BUSINESS OPERATIONS & PRODUCTIVITY

Yes

No

My business has documented workflows and SOPs for key processes.

I don't get stuck handling repetitive admin tasks (emails, invoicing, scheduling).

My projects and tasks are organized, with clear deadlines and accountability.

I can step away from my business for a few days without operations stalling.

I am using the right tools (CRMs, task managers, automations) to stay efficient.

GROWTH & SCALING READINESS

Yes

No

I have a clear, documented plan for business growth over the next 6–12 months.

I am not constantly playing catch-up and reacting to urgent tasks.

My workload is manageable, and I don't feel overwhelmed every week.

I have a system in place for onboarding new clients or team members.

I can identify areas in my business that need improvement and take action.

FINANCIAL & RESOURCE MANAGEMENT

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	My financial records are well-maintained, and I always know my cash flow status.
<input type="checkbox"/>	<input type="checkbox"/>	I don't spend too much time on invoicing, bookkeeping, or payroll.
<input type="checkbox"/>	<input type="checkbox"/>	I have a structured budget and know exactly where my money is going.
<input type="checkbox"/>	<input type="checkbox"/>	My pricing strategy ensures profitability while remaining competitive.
<input type="checkbox"/>	<input type="checkbox"/>	I have a plan in place for reinvesting profits to grow my business.

BRANDING & MARKETING STRATEGY

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	My website, social media, and branding are aligned and professionally presented.
<input type="checkbox"/>	<input type="checkbox"/>	I consistently generate leads through content, networking, or paid marketing.
<input type="checkbox"/>	<input type="checkbox"/>	I have an automated or structured follow-up system for nurturing leads.
<input type="checkbox"/>	<input type="checkbox"/>	My marketing doesn't feel scattered—I have a clear, intentional strategy.
<input type="checkbox"/>	<input type="checkbox"/>	I track the performance of my marketing efforts and adjust based on data.

YOUR SCORE AND NEXT STEPS

16–20 Yes Answers

Your business is running efficiently! Small refinements can take you even further.

10–15 Yes Answers

You're managing, but some inefficiencies are slowing you down. Time to optimize!

0–9 Yes Answers

You're doing too much on your own. It's time to delegate and streamline to grow effectively.

Need expert help in optimizing your business? [Let's chat!](#)