

# SMB Challenge Diagnosis Worksheet

In 15 minutes, score your small business in key areas to find your top priority challenge.

Rate each statement from 1 = Needs Improvement to 5 = Strong Performance.  
Add your total score for each section, then identify the lowest-scoring category — this is your priority to address first.

## Financial Health

Statement	1	2	3	4	5
I maintain a rolling 13-week cash flow forecast.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My invoices are sent promptly and paid within my target window.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I review financial reports monthly to adjust spending and pricing as needed.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have multiple revenue streams or backup sales channels.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Total Score:					

## Operational Efficiency

Statement	1	2	3	4	5
My core workflows are documented and consistently followed.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I use automation tools to eliminate repetitive manual tasks.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I can adapt quickly to supply chain disruptions or vendor issues.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My compliance requirements are up to date and monitored regularly.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Total Score:					

## Talent and Retention

Statement	1	2	3	4	5
I attract qualified candidates through clear, outcome-driven job descriptions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My team has access to professional development and skill-building opportunities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I regularly recognize and reward contributions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I use flexible or blended staffing models to meet demand.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Total Score:					

## Marketing Readiness

Statement	1	2	3	4	5
My website is optimized for mobile, speed, and SEO.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I use data or analytics to refine marketing campaigns.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I have a plan to retain existing customers as well as acquire new ones.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I maintain an active, consistent presence on key channels (e.g., LinkedIn, email, social).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Total Score:					

## My Top Priority

The category with the lowest total score is your priority to address first.

Category: \_\_\_\_\_

- Next steps:
- Write down the first steps you'll take to improve this area.
  - Identify one small change you can make this week.
  - Define what success looks like within the first month.
  - List the tools, partners, or people who can help.