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Consulting | Strategy | Coaching

QUARTERLY BUSINESS ASSESSMENT

15-Minutes to Complete | 5-Minutes to Review

FOUNDATION

What is your Mission? _____

How do your goals support your Mission? _____

What are your Values and Vision? _____

Who are your Clients? _____

Who is your Ideal Client? _____

Notes: _____

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ORGANIZATIONAL ALIGNMENT

Where do you wish you could spend more time? Less Time? _____

What is working best in your business? _____

What is your biggest current pain point? _____

What stops you from performing effectively? Efficiently? _____

What do you find most challenging? _____

Notes: _____

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RETURN ON INVESTMENT (ROI)

Where do you leverage systems? _____

How are your process(es) and results linked? _____

What is the best use of your time? _____

How do you leverage money? _____

How do you maximize your energy? _____

What activities do you automate? Delegate? _____

What activities should you limit? Eliminate? _____

Notes: _____

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CLIENT EXPERIENCE (CX)

Why do your ideal clients work with you? _____

Why do (some) promising leads never become clients? _____

When clients provide you feedback, what do they say? _____

What is your ideal client's biggest challenge? _____

What do you wish your clients' would do more of? Less of? _____

How often do your clients refer you to others? Become repeat clients? Why/Why not?

Notes: _____

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ELIMINATING CHALLENGES

If you could change one thing in your business **TODAY**, what would it be? _____

What can you implement **TODAY** that would most positively impact your business? _____

What is stopping you from implementing it **TODAY**? _____

What are the risks of waiting or doing nothing? _____

What can you eliminate **TODAY** that would most positively impact your business? _____

What is stopping you from eliminating it **TODAY**? _____

What are the risks of waiting or doing nothing? _____

Notes: _____

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