

## BUSINESS BALANCE

**LEGEND:** 1 Strongly Disagree 2 Disagree 3 Neutral 4 Agree 5 Strongly Agree

FINANCIAL PERSPECTIVE	1	2	3	4	5
We have clear, realistic financial goals for sales, profit, and cashflow.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We regularly review financial performance and act on insights	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our pricing and margins support sustainable growth.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

CUSTOMER & MARKET PERSPECTIVE	1	2	3	4	5
We know who our ideal customers are and what they value most.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our business stands out clearly from competitors in the market.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have a consistent process for generating and converting leads.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

INTERNAL PROCESSES & OPERATIONS	1	2	3	4	5
We have effective, repeatable systems for the key areas of the business.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Our daily operations run smoothly without constant firefighting.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I spend more time on growth and strategy than day-to-day tasks.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

LEARNING & GROWTH (PEOPLE & LEADERSHIP)	1	2	3	4	5
Our team (or support network) is motivated and aligned with business goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel confident as a leader when making decisions and setting direction.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We invest in developing skills, knowledge, and innovation for the future.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### SCORING TABLE – BUSINESS

Financial	Customer	Internal Processes	Learning & Growth	Total (out of 60)

### ZONE GUIDANCE (BUSINESS):

- **45–60 Strong & Scaling** - You have solid foundations. Coaching will help you scale & stretch your growth potential.
- **30–44 Stable but Stretched** - Your business is steady but under pressure. Coaching will help you prioritise, simplify, and unlock capacity.
- **Below 30 Needs Attention** - Foundations need strengthening. Coaching can give clarity, structure, and quick wins to reduce stress.

## PERSONAL BALANCE

**LEGEND:** 1 Strongly Disagree 2 Disagree 3 Neutral 4 Agree 5 Strongly Agree

MINDSET & GROWTH ORIENTATION	1	2	3	4	5
I believe I can grow and improve, even in challenging times.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am open to new ideas, feedback, and changing how I work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I take responsibility for results rather than blaming external factors.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

FOCUS & CLARITY	1	2	3	4	5
I have a clear personal vision of what success looks like for me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I can identify the 2–3 most important priorities in my life and work right now.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I make time to step back and think strategically about my goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

ENERGY & RESILIENCE	1	2	3	4	5
I manage stress well and have strategies for staying resilient.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I maintain a healthy balance between work, rest, and personal life.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I feel energised and motivated to move forward positively.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

COMMITMENT & ACTION	1	2	3	4	5
I am willing to invest time and energy into my personal and professional growth.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I follow through on plans and hold myself accountable for progress.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I am ready to be challenged and take action outside my comfort zone	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### SCORING TABLE – PERSONAL

Mindset & Growth	Focus & Clarity	Energy & Resilience	Commitment & Action	Total (out of 60)

### ZONE GUIDANCE (PERSONAL):

- **45–60 Growth-Ready & Committed** - You're self-aware and ready to be challenged. Coaching will accelerate your growth and confidence.
- **30–44 Open but Needs Focus** - You're open to change but might lack clarity or consistency. Coaching will help you find focus and accountability.
- **Below 30 Needs Attention** - Foundations need strengthening. Coaching can give clarity, structure, and quick wins to reduce stress.

## REFLECT & TAKE ACTION

1) WHICH AREA SCORED LOWEST - AND WHAT WOULD CHANGE IF YOU IMPROVED IT?

2) WHAT OPPORTUNITIES COULD YOU UNLOCK WITH MORE CLARITY, CONFIDENCE, OR SUPPORT?

3) WHAT WOULD IT MEAN FOR YOU TO CLOSE THESE GAPS OVER THE NEXT 90 DAYS?

COMMENT: