

Business audit.

Complete the ratings in the eight key areas of an advisory business. Focus and prioritize efforts in the areas with the largest deltas between current and desired future ratings, prioritizing the business area that comes first on the list below. Also identify who owns which areas for accountability and to uncover opportunities to delegate, hire, or partner out.

	Current rating 0-5, 5 strongly agree	Desired rating 0-5, 5 strongly agree	Owner Who owns this area of the business today?
Practice vision and management We have clear vision and alignment, a strategic plan, and manage the business' risk, profitability and productivity well.			
People and culture We have the right people in the right seats based on skills and expertise. Our team is aligned in attitude and effort.			
Technology and operations We have defined and adopted processes, and are at our desired level of efficiency.			
Client service and experience Our client service model meets or exceeds our clients' expectations, confirmed through client feedback and strong referral and retention rates.			
Financial planning Our financial planning solutions and process address our clients' needs and expectations.			
Investments Our investment management process is consistent in meeting our and our clients' goals and expectations.			
Business development We have a strong presence (i.e. website and social media), are growing through our marketing and development efforts, and effectively communicating to our clients.			
Adaptability We effectively navigate key issues and opportunities to progress towards our ideal future state (i.e. adopt new ways of doing things)			



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