



Business Check-in

Is your business becoming harder to run as it grows?

A practical 5-minute check-in for growing wholesale, retail and job-based businesses

See where your business stands today

For owners, managers and finance leaders.

As your business grows, there's naturally more to manage. More customers, orders, stock and transactions all create more activity.

Over time, new tools, spreadsheets and workarounds can become part of everyday operations. Individually they may work well, but together they can create extra steps, manual work and make it harder to get a clear view of the business.

This 5-minute Business Check-in helps you spot where that may be happening across four common pressure points:

- Your apps and spreadsheets
- Inventory visibility
- Reporting and decision-making
- Purchasing and supplier management

At the end, you'll get a simple result and a clearer view of where your business stands today and help you identify any opportunities to simplify.

Identify opportunities to simplify operations, improve visibility and reduce manual work so your business stays easy to run as you grow.

A better question than “Do we need another app?”

The real issue is often not missing software — it's a workflow that's becoming too hard to manage manually.



How to use this checklist

Read each statement and tick the ones that feel true in your business today. Do not overthink it. If something happens sometimes, that still counts. Add up your ticks in each section, then total your score at the end.

Total Score	What it means	Next step
0 - 4	Things feel under control	Keep processes documented and watch for repeat workarounds.
5 - 8	Friction is starting to show	Identify where handoffs are slowing people down.
9 - 12	Strain is becoming visible	Review where manual work is creating risk or delay.
13+	The current setup is under pressure	Look at whether connected workflows would reduce rework and confusion.

What to notice

- The same spreadsheet gets used over and over.
- People check more than one system to find the right answer.
- Work depends too much on one person.
- A problem in one area creates knock-on issues elsewhere.

Important - A high score does not mean failure. It usually means the business has outgrown the setup that worked at an earlier stage

Chapter 1 — Apps, Spreadsheets & Workflow Complexity

Most growing businesses do not intentionally create operational complexity.

It usually develops one practical decision at a time:

- a spreadsheet for reporting,
- an app for inventory,
- another tool for quoting,
- another workaround for approvals.

The challenge is rarely the number of tools.
The challenge is the handoffs between them.

Tick the statements that apply

- ☐ We use spreadsheets to manage important operational workflows
- ☐ Staff manually move information between systems
- ☐ Reports are rebuilt in Excel or Google Sheets
- ☐ Different teams use different ways to track the same process
- ☐ Work slows down when key staff are unavailable

Score: _____ / 5

What to improve first

- Map one important workflow from start to finish
- Identify where information is copied or checked manually
- Look for repeated spreadsheet workarounds
- Prioritise workflows affecting inventory, purchasing, customer commitments or cash flow

Your Overall Operations Score

Add your chapter scores together for a total score out of 20.

The goal is not perfection.

The goal is recognising where operational complexity may be limiting visibility, confidence or workflow continuity as the business grows.

Chapter	Area	Next step
1	Apps & workflows	___ / 5
2	Inventory visibility	___ / 5
3	Reporting & decision-making	___ / 5
4	Purchasing & supplier management	___ / 5
	Total	___ / 20

What your score means

- One high section: that workflow may need attention first.
- Two or more high sections: the problem may be connected, not isolated.
- High scores across all sections: the current operating model may be holding the business back.
- Low scores but growing volume: strain may appear soon as the business gets bigger.

A useful rule of thumb - If a problem needs information from more than one system to solve, it is usually a workflow problem.