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Business Growth Checklist for Small Business Owners



How to Use This Checklist

- Tick off what's already strong.
- Circle the areas that need attention.
- Choose **one** priority to focus on this month.
- Revisit the checklist every quarter to track progress.

ONE

Clarity & Direction

- I have a clear vision for where I want the business to be in 12 months.*
- I know my ideal customer and what problems I solve for them.*
- I have 3-5 strategic priorities that guide my decisions.*
- I review my goals monthly and adjust where needed.*

TWO

Marketing That Attracts the Right Clients

- I have a simple, consistent marketing plan I actually follow.*
- My website clearly explains what I do and who I help.*
- I regularly share valuable content (email, social, blogs, video).*
- I track which marketing channels bring in the best leads.*
- My messaging is clear, confident and focused on outcomes.*

THREE

Sales That Feel Natural (Not Pushy)

- I have a clear sales process from enquiry → conversion.*
- I follow up with leads consistently.*
- I know my conversion rate and how to improve it.*
- My pricing reflects the value I deliver.*
- I feel confident talking about my services and fees.*

FOUR

5-Star Client Experience & Retention

- *Clients know exactly what to expect when they work with me.*
- *I communicate proactively, not reactively.*
- *I personalise the experience where possible.*
- *I have a simple system for collecting testimonials.*
- *I have a referral process that encourages word-of-mouth growth.*

FIVE

Operations & Systems

- I have repeatable processes for the tasks I do often.*
- My onboarding and offboarding are smooth and consistent.*
- I use tools that save time (automation, scheduling, templates).*
- I know where bottlenecks or inefficiencies are in my business.*
- I have a plan for scaling without burning out.*

SIX

Financial Health

- I know my monthly revenue, profit and cashflow position.*
- I have clear financial targets for the next 12 months.*
- I understand my costs and where I can improve margins.*
- I pay myself consistently.*
- I have a simple budget or forecast I review regularly.*

SEVEN

Mindset & Leadership

- I make decisions confidently, not reactively.*
- I manage my time and energy intentionally.*
- I have support, accountability or mentorship when needed.*
- I invest in my own development as a leader.*
- I celebrate wins instead of rushing to the next task.*

FLIGHT

Growth Opportunities

- I know which products/services are most profitable.*
- I have explored ways to upsell, cross-sell or package my services.*
- I understand my competitive advantage in the local market.*
- I have identified partnerships or collaborations that could help me grow.*
- I regularly review what's working – and what isn't.*

NINE

Time Management & Productivity

- *I plan my week around my top priorities, not just my to-do list.*
- *I protect focused time for high-value work and minimise distractions.*
- *I use a simple system to organise tasks and deadlines consistently.*
- *I batch similar tasks to save time and reduce switching.*
- *I review where my time actually goes and adjust my habits regularly.*

TEN

Growing a Team

- *I have clarity on which tasks genuinely require my expertise and which could be delegated.*
- *I know the skills or roles my business needs next to grow sustainably.*
- *I have simple, repeatable processes that make onboarding new team members smooth and consistent.*
- *I communicate expectations clearly and give team members the support they need to succeed.*
- *I regularly review performance, capacity and workload to ensure the team is aligned and effective.*

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**I really hope you've taken a lot
of value from this checklist.**

**Share it with your network and
feel free tag me on socials.**



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**If you'd like some extra
support with this or
perhaps you'd like some
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touch or book a
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