
STRATEGIC BUSINESS GROWTH AUDIT

Business Growth Audit & Roadmap

Discover. Diagnose. Prioritise. Recommend. Roadmap.



PREPARED FOR

AUDIT DATE

PREPARED BY

Jamie Sonnex

ENGAGEMENT REF.



HOW THIS WORKBOOK WORKS

DISCOVER · DIAGNOSE · PRIORITISE · RECOMMEND · ROADMAP



Your Operational Fitness Check, Structured Into One System

This workbook is the working document for your 90-Minute Business Growth Audit. It follows the same five-stage method used across every Jamie Sonnex Consulting engagement, so what you capture here plugs directly into your final report and roadmap. Fill in the interactive fields as you go — on screen or in print — and it becomes your single source of truth for the engagement.



STEP 1

Discover

Structured discovery questions uncover how the business actually runs today — not how it's assumed to run.



STEP 2

Diagnose

Findings are scored against a RAG framework and consolidated into a single Business Health Score.



STEP 3

Prioritise

Every issue is plotted on an Impact vs. Effort matrix so the right things get fixed first.



STEP 4

Recommend

A clear set of recommendations, ranked and justified, replaces vague advice with a specific plan.



STEP 5

Roadmap

A 30/60/90-day roadmap and action tracker turn the plan into scheduled, owned, trackable work.



How to fill this in

Tap any shaded field to type directly, or click a box to check it off. Nothing here is scored automatically — your consultant reviews every field and translates it into the RAG ratings, health score and roadmap later in this pack.

01

Discovery

Understanding the business as it actually operates today

- 30-point structured discovery interview
- Covers strategy, delivery, systems, team & financial health
- Forms the evidence base for every score and recommendation that follows



Strategy, Growth & Vision

NOTES

- ☐ Tell me about your business
- ☐ What do you sell, and to whom?
- ☐ How long have you been trading?
- ☐ How many employees do you have?
- ☐ What are your revenue goals this year?
- ☐ Why did you book this audit?
- ☐ What keeps you awake at night?
- ☐ If you could fix three things tomorrow, what would they be?
- ☐ Are you growing? Is growth slowing?
- ☐ Is demand consistent?
- ☐ Are profits increasing alongside revenue?
- ☐ How involved are you day-to-day?
- ☐ What decisions can only you make?
- ☐ If you disappeared for four weeks, what would happen?

Sales, Marketing & Delivery

- ☐ Where do customers come from?
- ☐ Which marketing channels work?
- ☐ Why do customers buy? Why don't they buy?
- ☐ Do you have a sales process?
- ☐ Is a CRM in place?
- ☐ Where do deals get stuck?
- ☐ What's slowing delivery?
- ☐ What regularly goes wrong?
- ☐ Where are staff wasting time?
- ☐ What software / systems do you use?
- ☐ What isn't connected?
- ☐ What manual work exists?
- ☐ What would you automate first?

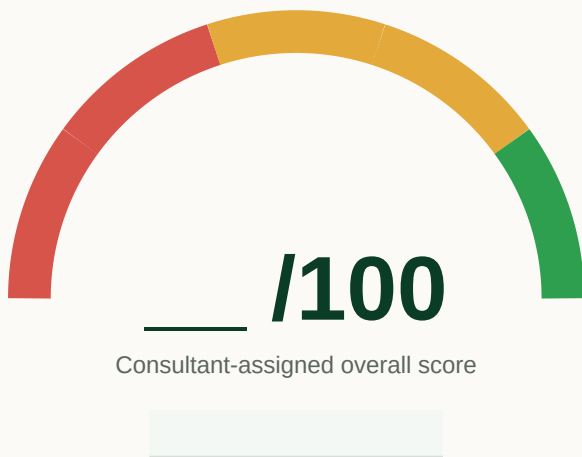
Operations, Team & Financial Health

- | | |
|---|---|
| ☐ Any recruitment or performance issues? | ☐ Gross margin %? |
| ☐ Is accountability clear across the team? | ☐ Biggest costs? |
| ☐ Do you have documented SOPs? | ☐ Is cashflow healthy? |
| ☐ Are your processes repeatable? | ☐ Most profitable products / services? |
| ☐ How do you ensure quality? | ☐ What is your customer retention rate? |
| ☐ What project management tools are used? | ☐ How do you collect customer feedback? |
| ☐ How does your team communicate? | ☐ What is your average response time? |
| ☐ What reporting / dashboard tools exist? | ☐ How do you handle customer complaints? |

CONSULTANT OBSERVATIONS

Overall Business Health Score

A single, weighted view of business health across five core dimensions — used as the headline figure in your final report.



SCORE BY CATEGORY

Strategy & Vision



Sales & Marketing



Operations & Delivery



Team & Accountability



Financial Health



WHAT THE SCORE MEANS

0–40

Foundational gaps — urgent attention needed

41–70

Functional but inconsistent — clear upside available

71–100

Strong foundations — focus shifts to scale & optimisation

02

Diagnosis

Turning discovery notes into an evidenced diagnosis

- SWOT analysis across strategy, people, systems and market position
- Current vs. future state operating model
- RAG scorecard and a formal risk register



SWOT Analysis

STRENGTHS

WEAKNESSES

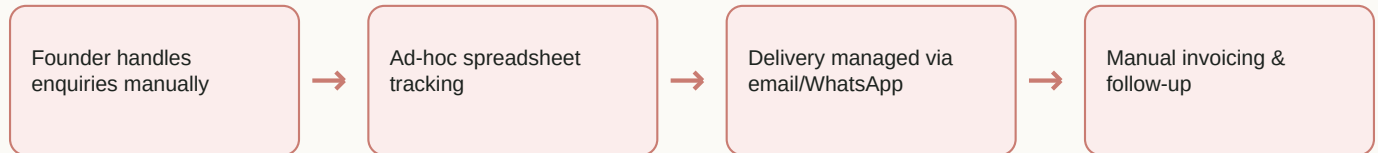
OPPORTUNITIES

THREATS

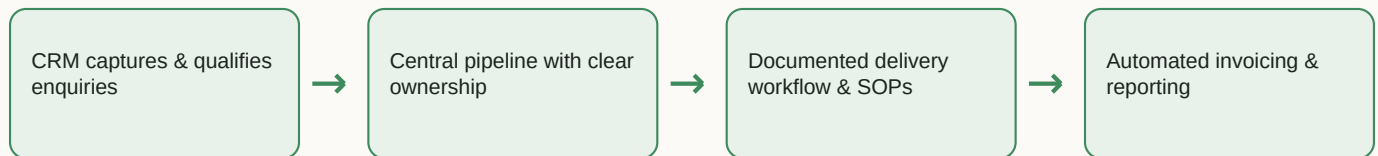
Operating Model: Current State vs. Future State

Map the business as it runs today, then the target model this engagement is designed to build toward.

CURRENT STATE



FUTURE STATE



GAP NOTES

RAG Scorecard by Business Area

BUSINESS AREA	RAG	TREND	COMMENTARY
Strategy & Leadership			
Sales Pipeline & CRM			
Marketing & Lead Generation			
Delivery & Operations			
Systems & Automation			
Team & Accountability			
Financial Management			
Customer Experience & Retention			

Risk Register

Risks identified during discovery that could materially affect growth, delivery or profitability if left unmanaged.

RISK	LIKELIHOOD	IMPACT	MITIGATION	OWNER
	● ● ●	● ● ●		
	● ● ●	● ● ●		
	● ● ●	● ● ●		
	● ● ●	● ● ●		
	● ● ●	● ● ●		
	● ● ●	● ● ●		

Detailed Observations

Space for free-form narrative observations gathered across the discovery and diagnosis sessions.

STRATEGIC OBSERVATIONS

COMMERCIAL OBSERVATIONS

OPERATIONAL OBSERVATIONS

PEOPLE & CULTURE OBSERVATIONS

03

Prioritisation

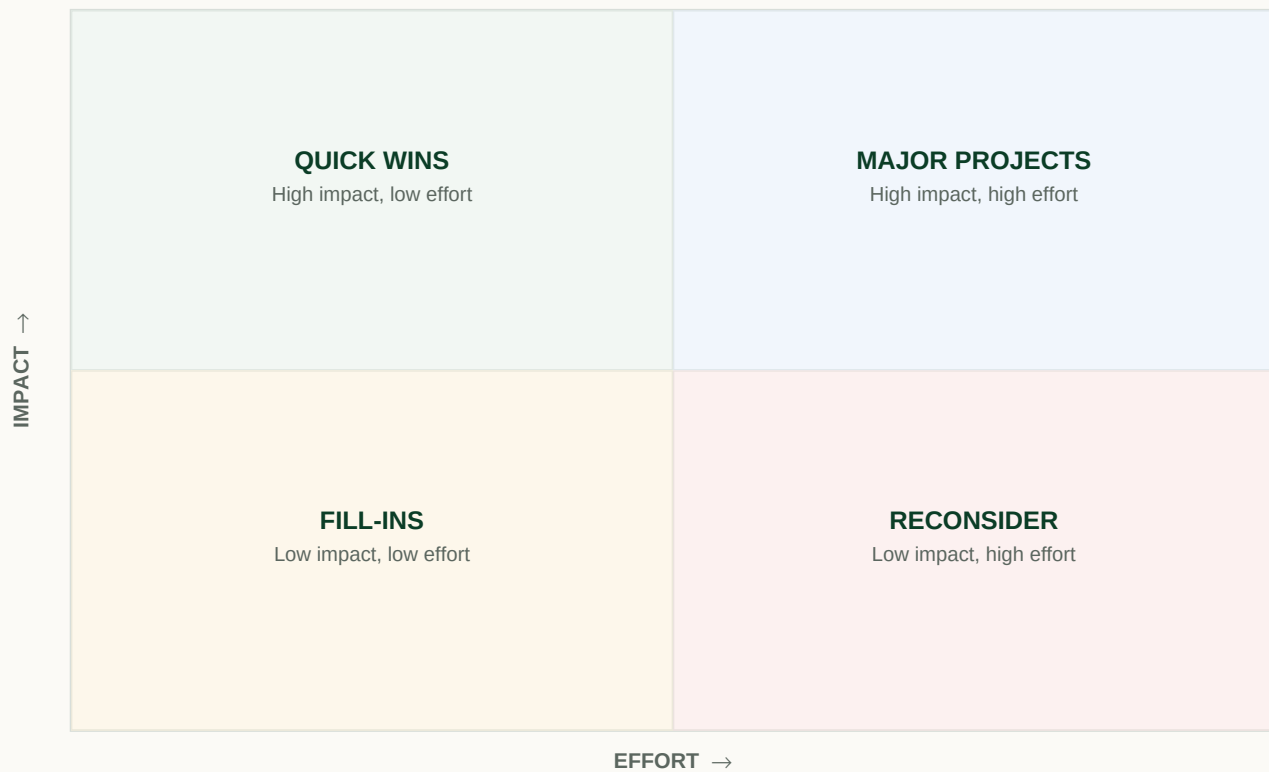
Deciding what to fix first, based on impact and effort

- Every issue plotted on an Impact vs. Effort matrix
- Quick wins separated from long-term strategic bets
- Forms the backbone of the 30/60/90-day roadmap



Impact vs. Effort Priority Matrix

Plot each finding by expected impact and implementation effort to decide sequencing.



KEY FINDINGS (PLOT ON MATRIX ABOVE)

1	
2	
3	
4	
5	

04

Recommendations

Specific, ranked actions replacing generic advice

- Each recommendation linked back to a discovery finding
- Ranked by priority and expected business impact
- Feeds directly into the executive summary and roadmap



Prioritised Recommendations

1		PRIORITY	
2		PRIORITY	
3		PRIORITY	
4		PRIORITY	
5		PRIORITY	

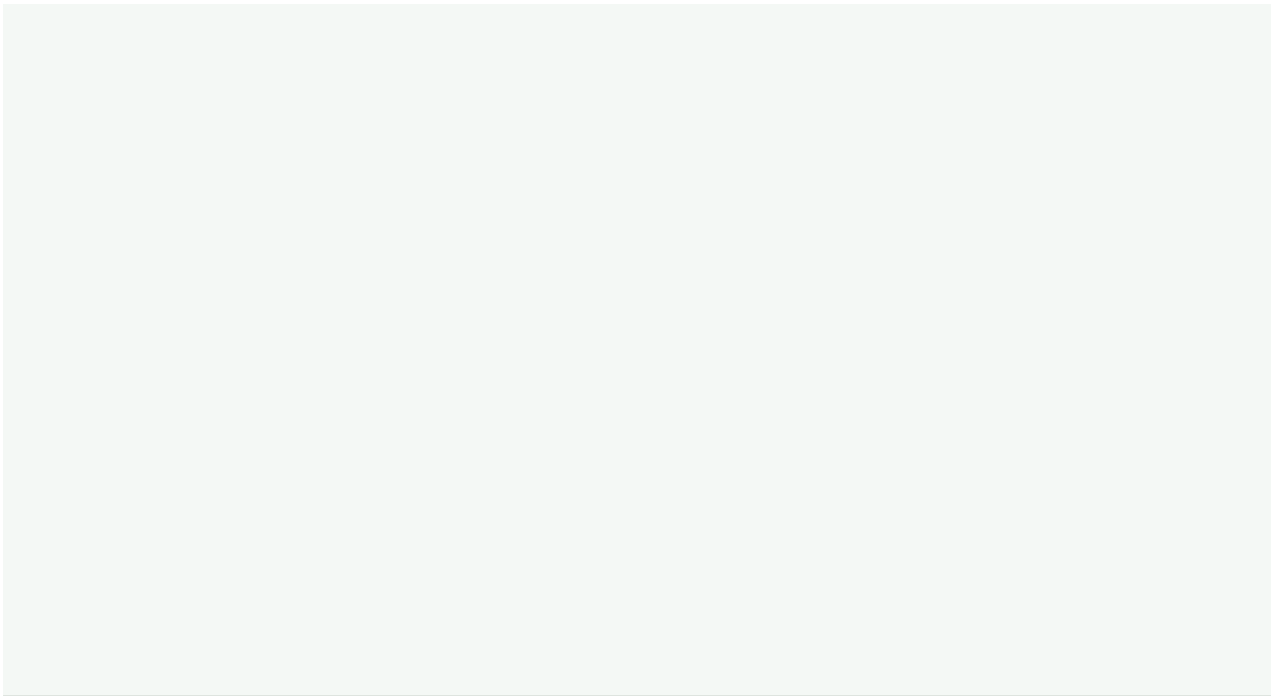
AI Summary

A concise, plain-English synthesis of the discovery and diagnosis sections above — generated after the audit session, then reviewed and refined by your consultant before it reaches the final report.



SUMMARY

AI-ASSISTED



05

Roadmap

From plan to scheduled, owned, trackable work

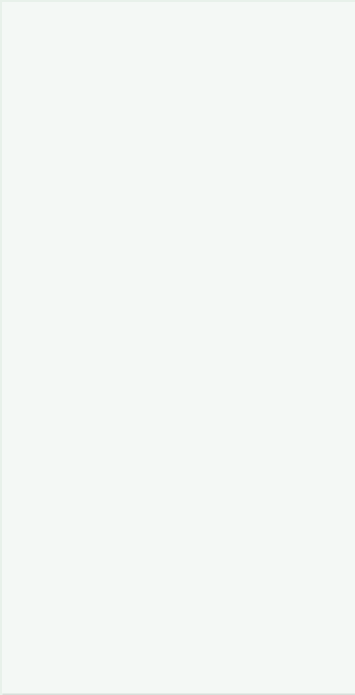
- A 30/60/90-day implementation roadmap
- An action tracker with owners, dates and status
- The final executive report and formal sign-off



30 / 60 / 90-Day Roadmap

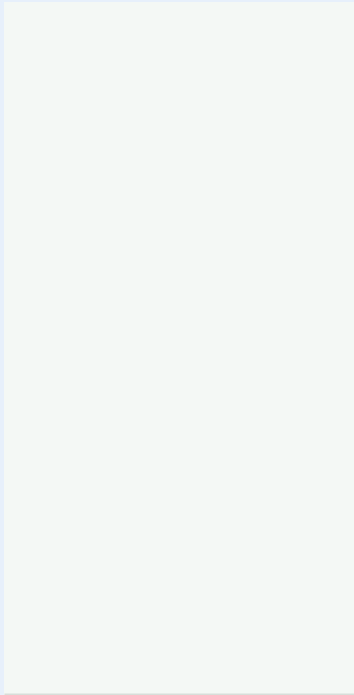
30 DAYS

Quick wins & foundations



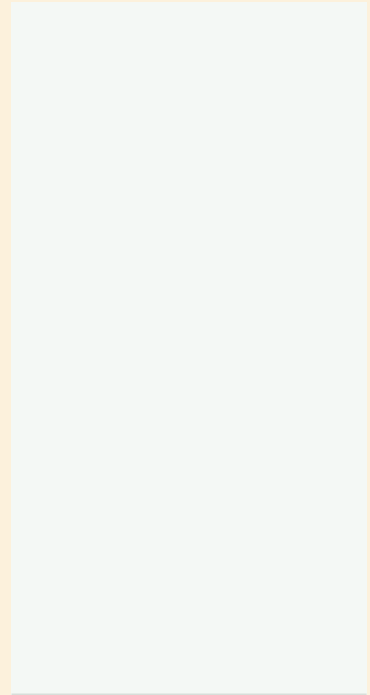
60 DAYS

Systems & process build-out



90 DAYS

Scale, automate & embed



Action Tracker

Live tracker for every agreed action — updated at each check-in.

ACTION	OWNER	DUE	STATUS	DONE
				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐

Executive Summary & Sign-Off

The headline output of this engagement: overall health, the case for action, and the agreed next step.

OVERALL SCORE

KEY RISKS

QUICK WINS

90-DAY TARGET

EXECUTIVE NARRATIVE

SIGN-OFF

Client Name

Date

Signature

Consultant Signature



Turning plans into progress.

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