



SMALL BUSINESS GROWTH ASSESSMENT

Evaluate the 8 critical systems that drive business growth and identify your biggest opportunities in **under 10 minutes**.



1.
STRATEGY &
PLANNING



2.
LEAD
GENERATION



3.
WEBSITE &
LEAD CAPTURE



4.
SALES
PROCESS



5.
MARKETING
EXECUTION



6.
CRM &
AUTOMATION



7.
AI &
TECHNOLOGY



8.
REPORTING &
PERFORMANCE

GET CLARITY. IDENTIFY GAPS. UNLOCK GROWTH.

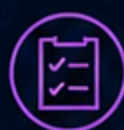
This assessment will help you benchmark your business, prioritize what matters most, and create a roadmap for sustainable growth.



TAKES LESS
THAN 10 MINUTES



INSTANT
SCORING



ACTIONABLE
INSIGHTS



FOCUSED ON
REAL GROWTH

SOLUTIONS THAT DRIVE CLARITY AND GROWTH.



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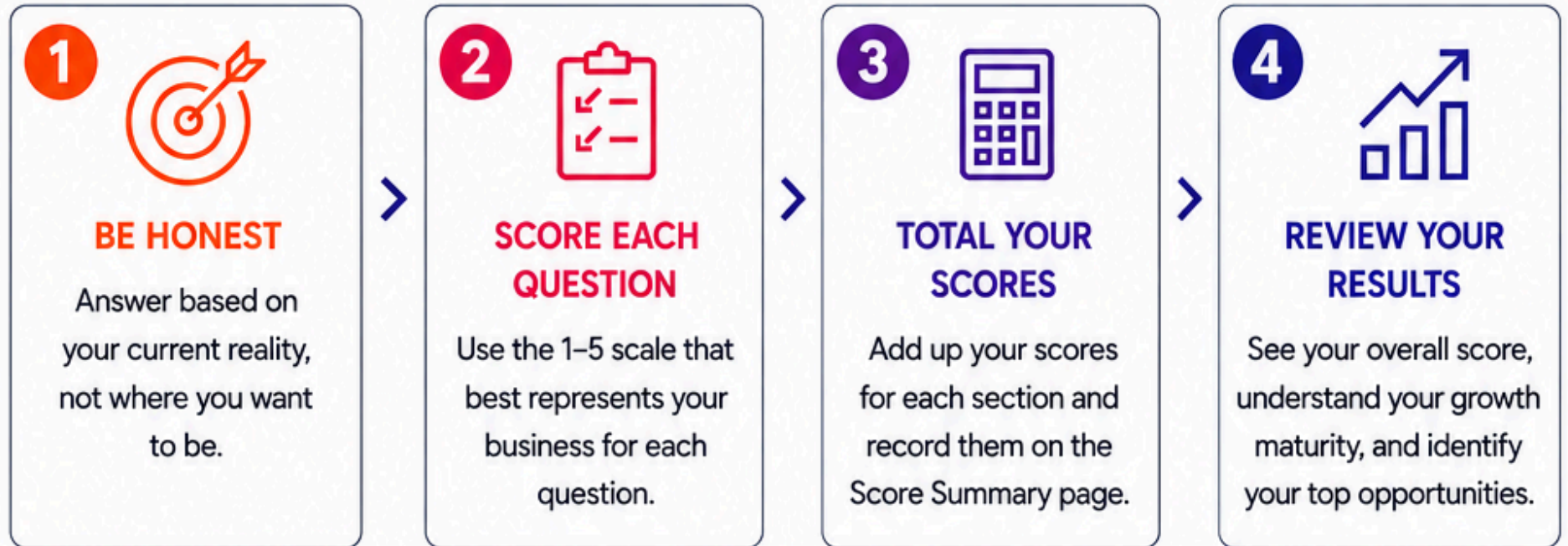
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Book a Meeting

HOW TO COMPLETE THIS ASSESSMENT





This assessment is designed to provide a clear snapshot of your business across **8 critical growth systems**.



SCORING SCALE	
5	EXCELLENT This is a strength. We have a clear process and it's consistently executed.
4	GOOD This is working well. We have a process and it's mostly consistent.
3	AVERAGE This is somewhat in place. We're making progress but not consistent.
2	POOR This is weak. We lack a clear process or it's not effective.
1	CRITICAL This is a major weakness. We have little to nothing in place.

WHAT YOUR RESULTS MEAN	
 73 - 100	HIGH PERFORMANCE You have a strong growth engine. Focus on optimization and scaling.
 49 - 72	GROWTH READY You're on the right track with a solid foundation. Focus on closing key gaps to accelerate growth.
 25 - 48	GROWTH POTENTIAL You have opportunities across multiple areas. Focus on building systems and improving consistency.
 0 - 24	GROWTH FOUNDATIONS Critical gaps exist. Focus on building the essential systems that drive sustainable growth.

TIPS FOR BEST RESULTS

-  Involve your leadership team for a more accurate assessment.
-  Use current data and real metrics where available.
-  Be objective – this is about improvement, not perfection.
-  Focus on progress, not just the final score.



CLARITY IS THE FIRST STEP TO GROWTH.
This assessment will help you identify what's working, what's not, and where to focus your time, resources, and energy for the biggest impact.

“ You can't improve what you don't measure.
– Peter Drucker

THE 8 GROWTH SYSTEMS ASSESSMENT

For each question, circle the score that best represents your business.



1 = Strongly Disagree | 3 = Neutral / Somewhat | 5 = Strongly Agree

		RATE YOUR BUSINESS (1-5)					YOUR SCORE (1-20)	
		1	2	3	4	5		
1 	STRATEGY & PLANNING A clear direction and solid plan drive everything.	1. We have a clear vision and long-term direction for our business.	1	2	3	4	5	/20
		2. We have defined goals and measurable targets.	1	2	3	4	5	
		3. We have a documented plan to achieve our goals.	1	2	3	4	5	
		4. We regularly review our strategy and adjust as needed.	1	2	3	4	5	
2 	LEAD GENERATION A consistent flow of quality leads fuels growth.	1. We have a consistent system for generating new leads.	1	2	3	4	5	/20
		2. Our ideal customer profile is clear and well-defined.	1	2	3	4	5	
		3. We have multiple sources of qualified leads.	1	2	3	4	5	
		4. We track and measure lead volume and quality.	1	2	3	4	5	
3 	WEBSITE & LEAD CAPTURE Our website converts visitors into leads effectively.	1. Our website clearly communicates our value and offerings.	1	2	3	4	5	/20
		2. We have clear calls-to-action throughout our site.	1	2	3	4	5	
		3. We capture leads with forms, offers, or other lead magnets.	1	2	3	4	5	
		4. Our website is optimized for mobile and fast performance.	1	2	3	4	5	
4 	SALES PROCESS A repeatable process turns leads into loyal customers.	1. We have a defined sales process from lead to close.	1	2	3	4	5	/20
		2. Our team follows a consistent sales methodology.	1	2	3	4	5	
		3. We track and manage our pipeline effectively.	1	2	3	4	5	
		4. We have a process for onboarding and retaining customers.	1	2	3	4	5	
5 	MARKETING EXECUTION We show up consistently and stay top of mind.	1. We have a documented marketing plan.	1	2	3	4	5	/20
		2. We create and share valuable content consistently.	1	2	3	4	5	
		3. We use multiple channels to reach our audience.	1	2	3	4	5	
		4. We track the results of our marketing efforts.	1	2	3	4	5	
6 	CRM & AUTOMATION Systems and automation make us more efficient.	1. We use a CRM to manage contacts and pipeline.	1	2	3	4	5	/20
		2. We automate repetitive tasks and follow-ups.	1	2	3	4	5	
		3. Our processes are documented and streamlined.	1	2	3	4	5	
		4. Automation saves us time and improves productivity.	1	2	3	4	5	
7 	AI & TECHNOLOGY We leverage tech and AI to work smarter and scale.	1. We leverage technology to improve our operations.	1	2	3	4	5	/20
		2. We use AI tools to enhance productivity or marketing.	1	2	3	4	5	
		3. We stay up to date with new technology trends.	1	2	3	4	5	
		4. Technology gives us a competitive advantage.	1	2	3	4	5	
8 	REPORTING & PERFORMANCE Data drives better decisions and stronger results.	1. We track the right KPIs that matter most.	1	2	3	4	5	/20
		2. We have dashboards or reports to monitor performance.	1	2	3	4	5	
		3. We review performance regularly with our team.	1	2	3	4	5	
		4. Data drives our decisions and future planning.	1	2	3	4	5	
TOTAL SCORE (OUT OF 160)						/160		




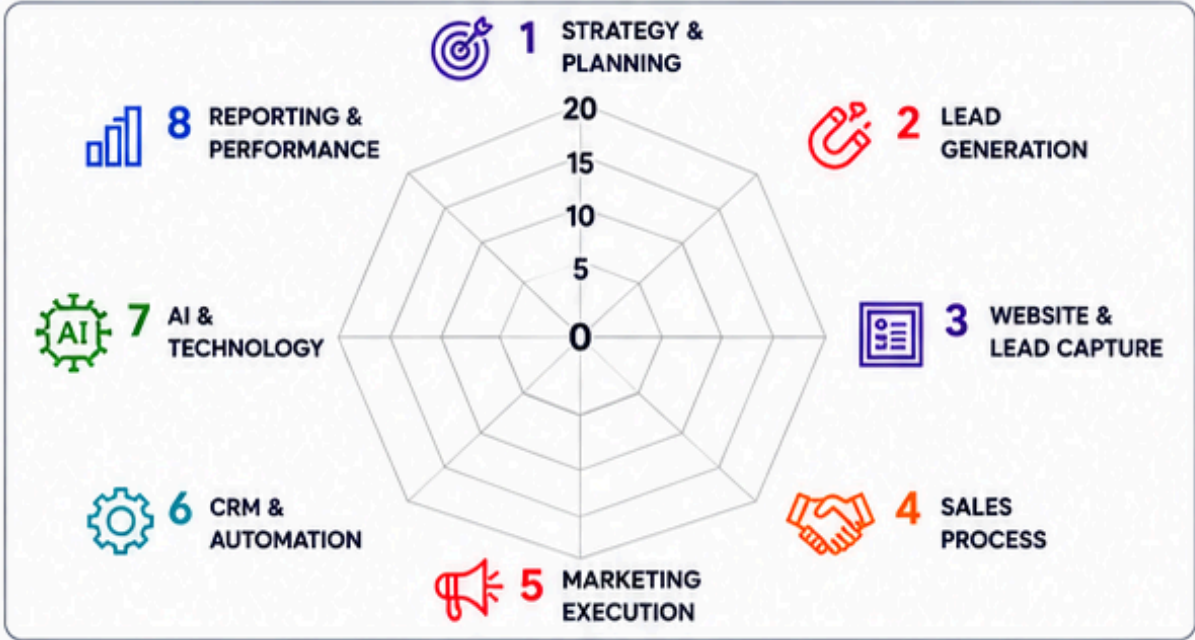
YOUR SCORE SUMMARY

Great job completing the assessment! Use this page to see your overall results, compare your scores across the 8 growth systems, and identify where to focus for the biggest impact.

YOUR SCORES BY GROWTH SYSTEM		
Transfer your scores from Page 3		
1 	STRATEGY & PLANNING Clear direction, goals, and strategic plan.	___ /20
2 	LEAD GENERATION Attract the right leads consistently.	___ /20
3 	WEBSITE & LEAD CAPTURE Convert visitors into qualified leads.	___ /20
4 	SALES PROCESS Turn leads into customers repeatedly.	___ /20
5 	MARKETING EXECUTION Market with consistency and impact.	___ /20
6 	CRM & AUTOMATION Automate and streamline for efficiency.	___ /20
7 	AI & TECHNOLOGY Leverage tech and AI to scale smarter.	___ /20
8 	REPORTING & PERFORMANCE Measure what matters and drive results.	___ /20
TOTAL SCORE (OUT OF 160)		___ /160

WHAT YOUR SCORE MEANS	
 140 – 160	GROWTH LEADER You have a strong, scalable foundation and are well-positioned for accelerated growth.
 110 – 139	GROWTH READY You are on the right track with a solid foundation. Focus on refining and optimizing key areas.
 80 – 109	GROWTH POTENTIAL You have opportunities to strengthen multiple areas. Focus on building systems and improving consistency.
 BELOW 80	GROWTH FOUNDATIONS REQUIRED Critical gaps exist across key systems. Focus on building a strong foundation first.

 **TIP:** There are no “bad” scores—only opportunities. Every business has room to grow. Use your results to focus on what will drive the biggest impact.



AT A GLANCE	
 YOUR STRONGEST AREA	Score: ___ /20
 LOWEST SCORING SYSTEM	Score: ___ /20
 FOCUS FOR MAXIMUM IMPACT	Improving your lowest scoring system will create the greatest impact on your overall growth.

YOUR NEXT STEPS

You've taken an important step toward sustainable growth by completing your assessment. Now it's time to turn insight into action.



CLARITY DRIVES GROWTH.

Focus on what matters most, take action, and build momentum that compounds over time.

1. QUICK WINS

These are areas that can drive immediate improvement with minimal time or resources.



Focus on systems scoring 13–20.



Implement 1–2 improvements this week.



Small actions create early momentum.

2. AREAS NEEDING ATTENTION

These are your biggest opportunities for growth and the areas to prioritize.



Focus on systems scoring 1–12.



Strengthen foundations before scaling.



Address gaps to unlock your next level.

3. QUESTIONS TO CONSIDER

Use these reflection questions to deepen your insights and guide your planning.



Which areas, if improved, would have the biggest impact on your growth?



What's one change you can make in the next 30 days?



Do you have the right people, tools, and processes in place?



What opportunities aren't you currently taking advantage of?



How will you measure progress and stay accountable?



READY TO ACCELERATE YOUR GROWTH?

Let's turn your insights into a clear, actionable roadmap that drives real results.

-  Customized growth roadmap
-  Expert guidance and strategic advice
-  Actionable steps for immediate impact
-  Ongoing support for long-term success



BOOK YOUR COMPLIMENTARY BUSINESS GROWTH CONSULTATION

30-minute session to review your results, identify priorities, and build your roadmap.

clearlinebusiness.ca

contact@clearlinebusiness.ca


(780) 851-4372



SCAN TO BOOK

Schedule your consultation in less than 60 seconds.

calendly.com/clearlinebusiness/30min



YOU DON'T HAVE TO DO IT ALONE.


Growth is a journey. We're here to help you navigate it with clarity, confidence, and a proven plan.

“ The best way to predict the future is to create it. ”

– Peter Drucker

90-DAY GROWTH ACTION PLAN

Turn your insights into action. Use this plan to prioritize what matters most, take focused action, and track your progress over the next 90 days.



FOCUS. EXECUTE. GROW.
Small, consistent actions lead to big, sustainable results.

A. YOUR TOP 3 PRIORITIES

Pick the three areas that will have the biggest impact on your growth.

1	SYSTEM Which growth system? _____	ACTION What specific action will you take? _____	OWNER Who is responsible? _____	TARGET DATE By when? _____
	SYSTEM Which growth system? _____	ACTION What specific action will you take? _____	OWNER Who is responsible? _____	TARGET DATE By when? _____
	SYSTEM Which growth system? _____	ACTION What specific action will you take? _____	OWNER Who is responsible? _____	TARGET DATE By when? _____

B. QUICK WINS (NEXT 30 DAYS)

High-impact actions you can complete in the next 30 days.

1	Action: _____ Owner: _____ Due Date: _____
2	Action: _____ Owner: _____ Due Date: _____
3	Action: _____ Owner: _____ Due Date: _____

C. STRATEGIC PROJECTS (31-90 DAYS)

Larger initiatives that will drive significant results.

1	Project: _____ Owner: _____ Target Date: _____
2	Project: _____ Owner: _____ Target Date: _____
3	Project: _____ Owner: _____ Target Date: _____

D. SUCCESS METRICS

Track the metrics that matter most to your business.

METRIC	CURRENT	TARGET (90 DAYS)
Leads Generated		
Revenue		
Conversion Rate		
Website Traffic		
Customer Retention		
Other (Specify)		

E. COMMITMENT STATEMENT

Your commitment drives your results.

“ I commit to completing the actions in this plan and reviewing progress monthly.

Signature: _____

Date: _____

NEED HELP IMPLEMENTING YOUR PLAN?

We're here to help you turn your plan into results. Book a complimentary Business Growth Consultation.

- Personalized Growth Roadmap
- Expert Guidance & Support
- Proven Strategies That Work
- Ongoing Accountability for Success

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SCAN TO BOOK
Schedule your 30-minute consultation in less than 60 seconds.

QUARTERLY GROWTH ROADMAP

Map out your plan for the next 90 days. Use this roadmap to turn your priorities into focused action and track your progress month by month.



CONSISTENT ACTION CREATES GROWTH.
Stay focused, track progress, and keep moving forward.

MONTH 1 DAYS 1-30

TOP PRIORITIES
The 3 areas that will make the biggest impact.

- _____
- _____
- _____

KEY ACTIONS
The key actions you will take this month.

- _____
- _____
- _____
- _____
- _____

SUCCESS METRICS
The metrics you will track to measure progress.

- _____
- _____
- _____
- _____

MONTH 2 DAYS 31-60

TOP PRIORITIES
The 3 areas that will make the biggest impact.

- _____
- _____
- _____

KEY ACTIONS
The key actions you will take this month.

- _____
- _____
- _____
- _____
- _____

SUCCESS METRICS
The metrics you will track to measure progress.

- _____
- _____
- _____
- _____

MONTH 3 DAYS 61-90

TOP PRIORITIES
The 3 areas that will make the biggest impact.

- _____
- _____
- _____

KEY ACTIONS
The key actions you will take this month.

- _____
- _____
- _____
- _____
- _____

SUCCESS METRICS
The metrics you will track to measure progress.

- _____
- _____
- _____
- _____

90-DAY SUCCESS CHECKLIST

Use this checklist to stay accountable and ensure you're on track for growth.

 Priorities identified	 Action plan created	 Metrics defined	 Monthly reviews completed	 Growth targets achieved	 Growth strategy session booked with Clearline
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READY FOR A SECOND OPINION?
If you'd like help prioritizing your roadmap, identifying bottlenecks, or accelerating growth, book a complimentary Business Growth Consultation.

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“ A goal without a plan is just a wish.
A plan with action is the path to growth.
– Clearline Business Solutions



You have the insights.
You have the plan.
Now take action and grow your business.