KZ CONSULTING

STRATEGY | SYSTEMS | GROWTH

A FREE SELF-ASSESSMENT FOR BUSINESS OWNERS

The KZ Clarity Check

See your business clearly before deciding what to fix.

8 AREAS · 48 QUESTIONS · ABOUT 20 MINUTES

BEFORE YOU BEGIN

Understand first. Then decide what to fix.

Most business owners can name their biggest problem: sales are slow, staff aren't performing, customers are complaining. But the problem you can see isn't always the real problem. Before spending money on a solution, it helps to step back and look at the whole business.

The KZ Clarity Check walks you through eight connected areas of your business. It won't tell you what to do. It will show you where to look, what's working, and, just as importantly, what you don't yet know.

HOW TO ANSWER

2
In place
This is true for the business, consistently.

1
Partly
Sometimes true, or true in some parts of the business.

0
Not yet
This isn't happening yet.

?
Not sure
I don't know, or I'd have to guess. This counts too.

TO GET THE MOST FROM IT

- Answer for how the business works **today**, not how you plan for it to work.
- Go with your first honest answer. Nobody else needs to see this.
- Use **Not sure** freely. An honest "I don't know" is more useful than a guess, and it is one of the most revealing results in this check.
- If you have a partner or a manager, ask them to complete it separately, then compare.

You can print this and tick by hand, or fill it in on screen. Answer buttons and score boxes are clickable in most PDF readers.

This is a self-assessment tool to help you reflect on your business. It is not a professional audit, financial review or diagnosis.

AREA 01 OF 08

Direction & Strategy

01

If the direction isn't clear, every other part of the business ends up working towards something different.

STATEMENT	IN PLACE	PARTLY	NOT YET	NOT SURE
1. I can explain in one or two sentences what the business does and who it serves.	○	○	○	○
2. There is a clear direction for the next 12 months, and it is written down.	○	○	○	○
3. My key people would describe where the business is going the same way I would.	○	○	○	○
4. I know which products or services matter most to the business, and which don't.	○	○	○	○
5. I know who our main competitors are and what makes us different.	○	○	○	○
6. Big decisions are made against clear priorities, not just whatever feels urgent that day.	○	○	○	○

Area score
2 per In place + 1 per Partly

_____ / 12

Not sure answers
Count them separately

_____

IF THIS AREA NEEDS ATTENTION, ASK YOURSELF

> Where do I want the business to be in 12 months, in specific terms?
>
> Which products, services or customers deserve our focus, and which are distractions?
>
> If I asked my team where we are going, would their answers match mine?

NOTES

AREA 02 OF 08

Structure & Roles

When roles are unclear, work gets duplicated, dropped, or pushed back to the owner.

STATEMENT	IN PLACE	PARTLY	NOT YET	NOT SURE
1. Every key role has a clear, agreed set of responsibilities.	○	○	○	○
2. Staff know who they report to and who makes which decisions.	○	○	○	○
3. The business could run for a week without me making every decision.	○	○	○	○
4. When something goes wrong, it is clear whose job it is to fix it.	○	○	○	○
5. New staff are trained in a consistent way, not just 'shown around'.	○	○	○	○
6. Expectations for each role are agreed and communicated, not assumed.	○	○	○	○

Area score
2 per In place + 1 per Partly

_____ / 12

Not sure answers
Count them separately

_____

IF THIS AREA NEEDS ATTENTION, ASK YOURSELF

> Which decisions currently wait for me, and which could someone else make?
>
> If I listed every important task, would each one have a single clear owner?
>
> When something goes wrong, does it get fixed, or does it get argued about?

NOTES

AREA 03 OF 08

Operations & Processes

03

Consistent results come from consistent processes, not from relying on the right person being on shift.

STATEMENT	IN PLACE	PARTLY	NOT YET	NOT SURE
1. Our main tasks are done the same way, whoever is doing them.	○	○	○	○
2. Key processes are written down somewhere staff can find them.	○	○	○	○
3. We know where delays, waste or repeated mistakes happen.	○	○	○	○
4. There are checks to confirm important work has been done properly.	○	○	○	○
5. Stock, supplies or materials are tracked, not guessed.	○	○	○	○
6. When a process stops working, we review it and change it.	○	○	○	○

Area score
2 per In place + 1 per Partly

_____ / 12

Not sure answers
Count them separately

_____

IF THIS AREA NEEDS ATTENTION, ASK YOURSELF

> Which task causes the most repeated mistakes or complaints?
>
> If someone new started tomorrow, how would they learn how things are done here?
>
> Where might we be losing time, stock or money without noticing?

NOTES

AREA 04 OF 08

Customers & Experience

Customers judge the whole experience, not just the product. Gaps here often show up later as 'low sales'.

STATEMENT	IN PLACE	PARTLY	NOT YET	NOT SURE
1. I know who our best customers are and why they buy from us.	○	○	○	○
2. We keep a record of our customers and how to reach them.	○	○	○	○
3. Complaints are recorded, followed up and used to improve things.	○	○	○	○
4. Customers get a similar standard of service, whoever serves them.	○	○	○	○
5. We stay in touch with customers after they buy.	○	○	○	○
6. We know roughly how many of our customers come back.	○	○	○	○

Area score
2 per In place + 1 per Partly

_____ / 12

Not sure answers
Count them separately

_____

IF THIS AREA NEEDS ATTENTION, ASK YOURSELF

> Why do our best customers keep coming back, and do we know for certain?
>
> What do customers complain about most, and what changed as a result?
>
> At what point do we lose touch with a customer?

NOTES

AREA 05 OF 08

Sales & Marketing

05

More marketing won't fix a weak sales process or the wrong price. This area looks at how customers are won, not just reached.

STATEMENT	IN PLACE	PARTLY	NOT YET	NOT SURE
1. I know where most of our new customers come from.	○	○	○	○
2. There is a clear, consistent process from enquiry to sale.	○	○	○	○
3. Enquiries are responded to within an agreed time.	○	○	○	○
4. Our prices are set deliberately, based on costs and the market.	○	○	○	○
5. Marketing is planned ahead, not only done when sales are slow.	○	○	○	○
6. We can tell which marketing efforts are actually bringing in customers.	○	○	○	○

Area score
2 per In place + 1 per Partly

_____ / 12

Not sure answers
Count them separately

_____

IF THIS AREA NEEDS ATTENTION, ASK YOURSELF

> Where do enquiries get lost between first contact and payment?
>
> How were our current prices set, and when were they last reviewed?
>
> Which activity brings paying customers, not just attention?

NOTES

AREA 06 OF 08

Money & Performance

06

It is hard to make confident decisions about a business whose numbers you have to guess.

STATEMENT	IN PLACE	PARTLY	NOT YET	NOT SURE
1. I know our monthly sales figures without having to estimate.	○	○	○	○
2. I know which products or services make the most profit, not just the most sales.	○	○	○	○
3. Business money and personal money are kept separate.	○	○	○	○
4. We know what our regular monthly costs are.	○	○	○	○
5. We track a small number of key figures regularly to see how the business is doing.	○	○	○	○
6. If the business started losing money, I would know within a month.	○	○	○	○

Area score
2 per In place + 1 per Partly

_____ / 12

Not sure answers
Count them separately

_____

IF THIS AREA NEEDS ATTENTION, ASK YOURSELF

> Which three numbers would tell me each month whether the business is healthy?
>
> Do I know what each product or service really costs us to deliver?
>
> Could I tell the difference between a busy month and a profitable one?

NOTES

AREA 07 OF 08

Records & Information

07

Information that lives in one person's head or phone is a risk to the business, and a barrier to growth.

STATEMENT	IN PLACE	PARTLY	NOT YET	NOT SURE
1. Important records (sales, expenses, staff, customers) are kept consistently.	○	○	○	○
2. Records can be found quickly when they are needed.	○	○	○	○
3. Key information is not held only in one person's head or phone.	○	○	○	○
4. Important documents (agreements, policies, licences) are filed and up to date.	○	○	○	○
5. Our records are accurate enough to base decisions on.	○	○	○	○
6. Someone is clearly responsible for keeping records up to date.	○	○	○	○

Area score
2 per In place + 1 per Partly

_____ / 12

Not sure answers
Count them separately

_____

IF THIS AREA NEEDS ATTENTION, ASK YOURSELF

> If a key person left tomorrow, what information would leave with them?
>
> Which records do we keep but never use, and which do we need but don't keep?
>
> How long would it take to find a specific record from three months ago?

NOTES

AREA 08 OF 08

Systems, Tools & Controls

Tools should support how the business really works. Controls should catch problems before they become losses.

STATEMENT	IN PLACE	PARTLY	NOT YET	NOT SURE
1. The tools we use (apps, software, spreadsheets) fit how the business works.	○	○	○	○
2. Staff use our tools consistently, not only when reminded.	○	○	○	○
3. Cash, stock and payments have checks that would catch errors or losses.	○	○	○	○
4. Access to money and important information is controlled.	○	○	○	○
5. We don't have to enter the same information in several places.	○	○	○	○
6. We review our systems when the business grows or changes.	○	○	○	○

Area score
2 per In place + 1 per Partly

_____ / 12

Not sure answers
Count them separately

_____

IF THIS AREA NEEDS ATTENTION, ASK YOURSELF

> Where do we enter the same information more than once?
>
> If money or stock went missing, how quickly would we notice?
>
> Are our tools helping us, or have we built workarounds around them?

NOTES

YOUR RESULTS

Your Clarity Profile

Copy your area scores and Not sure counts here. Then shade one box per point to see the shape of your business at a glance.

AREA	SCORE	NOT SURE	SHADE YOUR SCORE (ONE BOX PER POINT)
01 Direction & Strategy			
02 Structure & Roles			
03 Operations & Processes			
04 Customers & Experience			
05 Sales & Marketing			
06 Money & Performance			
07 Records & Information			
08 Systems, Tools & Controls			
Total			Total out of 96. The shape matters more than the total.

10 to 12

Solid foundation

This area is working. Protect it as the business changes.

6 to 9

Partly built

Some structure is there, but it depends on people or habits.

0 to 5

Needs attention

This area is likely holding other parts of the business back.

Two or more Not sure answers in one area? Treat that area as needing a closer look, whatever its score. You can't build structure on information you don't have.

READING YOUR RESULTS

What your profile is telling you

1 **Look at the shape, not just the total.**

A business can score well overall and still have one weak area holding everything else back. Your lowest areas are usually more important than your total.

2 **"Not sure" is a finding, not a failure.**

If you couldn't answer, the information probably isn't being captured, isn't being shared, or nobody owns it. These clarity gaps are often where the real problems are hiding.

3 **The areas are connected.**

A low score in one area is often caused by another. Before treating any single score on its own, ask what else might be feeding it.

4 **This is your view of the business.**

Staff, partners and customers may see it differently. Where their answers would differ from yours is worth knowing.

AN EXAMPLE

“Our sales are low.”

The obvious answer is more marketing. But the profile might point somewhere else:

Customers & Experience	Are customers coming once and not returning?
Sales & Marketing	Are enquiries coming in but not being followed up?
Money & Performance	Is the price right, and do you know which items are profitable?
Operations & Processes	Is what customers receive consistent from one day to the next?

Each of these needs a different solution. Fixing the wrong one costs time and money, and the real problem stays where it was.

WHAT THIS CHECK CAN'T TELL YOU

Why the gaps exist, which ones matter most for where you want to go, and what to fix first. Those answers come from looking at how the business actually runs, not only from how it is described.

YOUR NEXT STEPS

One area. One honest look.

Not every gap needs to be fixed at once. Choose one area to understand properly before you act on it.

1 The area I will look at first

Usually your lowest score, or the area with the most Not sure answers.

2 What I know, and what I'm assuming

Separate the facts you can check from the things you believe to be true.

WHAT I KNOW FOR SURE

WHAT I'M ASSUMING

3 The one question I need to answer in the next 30 days

Pick a question from that area's page, or write your own.

4 Who needs to be involved

Who holds the information, does the work, or will be affected?

5 When I will take this check again

Repeating it in 3 to 6 months shows whether things are really changing.

THE KZ APPROACH

From clarity to structure

This check covers the first step and the start of the second. A full KZ assessment goes the rest of the way.

1	2	3	4	5
Clarity	**Assessment**	**Structure**	**Action**	**Growth**
Understand the business as it is today.	Find the gaps, risks and real causes.	Turn findings into processes, roles, records and tools.	Prioritise and plan a realistic path forward.	Improve from a stronger foundation.

Steps 1 and 2: where this Clarity Check takes you

WHAT A KZ BUSINESS ASSESSMENT ADDS

- We look at how your business actually runs, not only how it is described.
- We test the gaps you found and identify what is causing them.
- We turn the findings into practical structure your team can use day to day.
- We give you a prioritised plan, so you know what to do first, and what can wait.

NEXT STEP

Book a 20-minute Clarity Review

Send us your completed Clarity Profile. In 20 minutes, we'll walk you through what it shows, which gaps to look at first, and what a sensible next step would be.

Discounted for Clarity Check users

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KZ CONSULTING
STRATEGY | SYSTEMS | GROWTH

We won't promise results we can't stand behind. What we can offer is an honest, clear picture of your business, and a practical path forward.