

Processes - Your systems, structures and safeguards.

Your 17 Processes Topics

Processes	Score Now	Mode
Legal and Compliance Policies		
Insurances		
Banking		
Bookkeeping and Invoicing		
Financial Forecasting		
Planning and Goal Setting		
Business Continuity Planning		
Cyber Resilience (Essentials)		
Technology (inc. Digital Transformation)		
Customer Relationship Management (CRM)		
Marketing		
Sales Pipeline		
Advertising		
Website		
Social Media		
Referrals		
Supplier Resilience and Procurement		
Processes Pillar total score this quarter		

Score 1-2 – Build | 3-4 – Strengthen | 5 - Scale

Your Chosen Actions This Quarter

1.

2.

3.

4.

5.

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Date:

Agreed By (Your Team):

Any Actions Carried Forward:

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Insert Actions Into Your Plan

Reflection and Learning

Master Business Plan (who, by when)

What improved most since the last review?

Marketing Plan (who, by when)

What still feels fragile?

Sales Plan (who, by when)

How will I know if it's better?

Recruitment Plan (who, by when)

Where will I focus next?

Leadership, Training & Development Plan (who, by when)

Who else needs to see this?

Finance Plan (who, by when)

Other notes

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