



PRINTABLE SCORECARD

TAKE THE HEALTH CHECK

The Small Business Financial Health Check Scorecard

A Straight Forward Scorecard
for Small Business Owners

Expert Guidance from
Blue Rocket Accounting
Chartered Tax Advisers and Accountants



Take the Blue Rocket Accounting Small Business Health Check

Score each question from 1 to 5:

1 = Never / Not in place

3 = Sometimes

5 = Consistently and effectively



Financial Visibility

1. I review management accounts every month.
2. I know my current cash position at all times.
3. I have a clear view of my business profitability.

Cash Flow Management

1. I maintain a cash flow forecast.
2. Customers pay me on time.
3. I have at least 3 months of operating cash available.

Growth & Planning

1. I have financial goals for the next 12 months.
2. I regularly measure performance against targets.
3. I understand which products/services generate the highest profit.

Systems & Processes

1. My bookkeeping is accurate and up to date.
2. I use cloud accounting software effectively.
3. Financial information is readily available when needed.

Tax & Compliance

1. Tax deadlines are never missed.
2. I proactively plan for tax liabilities.
3. I regularly seek professional advice on tax efficiency.

Total:

Your Results

- 60-75: Excellent – Your financial foundations are strong.
- 45-59: Good – A few improvements could unlock further growth.
- 30-44: Fair – There are opportunities to strengthen performance.
- Below 30: Action Required – A financial health review would definitely help improve your position.

Next Steps

Understanding your business's financial health is the first step towards improving profitability, strengthening cash flow, and creating a clear strategy for sustainable growth.

Book a no-obligation 45-minute online Discovery Meeting with our Director and Business Growth Manager, Miguel Calabrese. During the session, we'll discuss your business goals, challenges, and opportunities, sharing practical ways we can provide support that could make a real difference to your business performance.

Get the accounting support your business deserves with Blue Rocket Accounting, Kent's trusted 5-star accountants.

Check Miguel's availability and book your Discovery Meeting today.

[Schedule Your Discovery Call](#)

Blue Rocket Accounting

[Get Directions](#)

Send us a question: office@bluerocketaccounting.com

Call us: 01322 555 442

