

Business Health Index™

Growth

Thriving

Dynamic strategy with continuous market sensing. Leadership operates with full autonomy. Organizational culture itself drives strategic execution company-wide.

Fully integrated marketing and sales engine driving diversified, predictable revenue. Market leadership in core segments. Brand drives inbound demand at scale. ICP systematically targeted across all channels.

World-class financial ops. with real-time visibility. Capital optimized. Scalable operating model with AI & automation deeply embedded. Continuous improvement drives sustained margin expansion.

Best-in-class talent across all functions. Culture is a strategic asset & recruiting differentiator. Leadership bench is deep. Top talent attracted & retained.

Customers are advocates and co-creators. Delivery is consistent, scalable, and a true differentiator. Net revenue targets consistently met. Customer outcomes directly drive business growth.

Data leveraged predictively across the business. AI/ML models enable real-time optimization. Tech stack fully integrated and delivering measurable competitive advantage.

Value Expansion

Scaling

Rolling 3–5 year strategy with scenario planning. Leadership fully empowered to execute. Monthly strategic reviews. Strong board or advisory governance active.

Full-funnel revenue engine with marketing and sales fully aligned. Predictable revenue with strong retention. Pipeline visibility strong. Brand building and demand generation working in concert.

Multi-year financial modeling with scenario analysis. Unit economics well understood and optimized. Scalable operating model deployed. Automation driving measurable efficiency gains across key workflows.

Strong employer brand attracting candidates. Leadership bench actively developing. Culture tracked quarterly. Competitive compensation philosophy documented.

Customer lifecycle fully mapped & managed. Delivery standards defined & consistently met. Expansion revenue motion active. High NPS with formal advocacy programs in place.

Data-driven culture embedded across the organization. Advanced analytics and AI/ML improving engagement, conversion, and operational efficiency. Dashboards in use at every level.

Foundational

Stabalizing

Clear 3-year vision with annual goals and KPIs. Leadership aligned on priorities. QBR's in place. Strategic planning tied directly to resource allocation.

Repeatable sales process with defined stage criteria. CRM fully adopted. Marketing generating qualified pipeline. CAC and LTV tracked and clearly understood.

Rolling 12-month forecast maintained. Strong P&L; with cash flow proactively managed. Core processes documented & consistently followed. Initial automation beginning to take hold in key workflows.

Structured hiring and onboarding in place. Performance reviews conducted consistently. Culture metrics improving. Leadership development programs beginning to take shape across the organization.

Proactive service & delivery function in place. Delivery standards documented and followed. NPS tracked & acted upon. Churn rate declining. Customer health scores beginning to inform strategy.

Data used proactively. Systems integrating and key metrics tracked. Centralized reporting emerging. Progressive use of AI/ML tools beginning to support decision-making across functions.

Value Creation

Surviving

Annual planning exists but loosely followed. Leadership aligned directionally but execution is inconsistent. Strategic priorities shift under market pressure or internal team dynamics.

Sales process beginning to emerge with Some pipeline visibility. Marketing activity is ad hoc and disconnected from sales. Revenue growing is inconsistent with heavy reliance on a few key accounts.

Basic budgeting in place. Cash flow monitored but not proactively managed. Key processes documented but not consistently followed. Bottlenecks identified but unresolved. Workarounds accepted as normal.

Core values defined but not embedded in daily practice. Some structured hiring emerging. Retention improving. Leadership bench remains dangerously thin across most critical functions.

Basic service and delivery standards exist but are inconsistent. Customer feedback collected but rarely acted upon. Issues addressed reactively. No clearly defined proactive retention strategy.

Understanding of data beginning to form. Disparate systems being integrated. Limited reporting in place. Some AI/ML trialing for specific use cases. Data management remains largely manual.

Random

Struggling

No clear vision or documented strategy. Leadership is misaligned on priorities. Decisions are reactive and inconsistent. Short-term survival thinking dominates every conversation.

No defined marketing or sales process. Revenue is founder-dependent & inconsistent. Growth driven solely by referrals. No pipeline visibility, ICP definition, or repeatable motion ins place.

Cash flow is unpredictable and a source of stress. No formal budgeting. Decisions made on gut feel. Processes undocumented. Constant firefighting drains capacity. No operational rhythm.

High turnover with no root cause identified. No culture or values embedded. Hiring is reactive and unstructured. No performance management framework or review process exists.

No defined service or delivery standards. Issues reactively by leadership. No understanding of churn drivers or customer lifetime value. No proactive customer success or delivery function.

Data silos with little to no automation. Systems disconnected & manually administered. No reporting, AI or technology infrastructure. or strategy. Data management entirely ad hoc and reactive.

Low Value



Leadership & Strategy



Marketing & Sales



Finance & Operations



People & Culture



Customer Service & Delivery



Data & Technology

