

Richard A Bobb Chartered Accountants

# Business Health Assessment Guide

Richard A Bobb Chartered Accountants  
[www.richardabobb.com.au](http://www.richardabobb.com.au) | +61 2 8223 6888

# Comprehensive Business Health Assessment

At Richard A Bobb Chartered Accountants, we believe financial reports are more than compliance — they are powerful tools for understanding the true health of a business. Our Business Health Assessment framework allows us to identify opportunities, risks, and strategies that help our clients thrive.

## Discovery Questions

1. Which industry do you operate in?
2. How many years have you been in business?
3. What is your annual gross revenue/turnover (AUD or NZD)?
4. What is your average EBITA?
5. How many employees do you have?
6. What are the main concerns of your business from your perspective? (e.g., Cash flow, Profitability, Capacity constraints, Growth funding, Talent constraints, Operational efficiencies, Administrative efficiencies)
7. From the accountant's perspective, what is the biggest concern based on financial data?

## Assessment & Strategic Insights

- Key financial indicators of business health (liquidity, profitability, efficiency) with industry benchmarks
- Cash flow dynamics and the 'capacity cliff edge' assessment (is the business too close to maximum capacity?)
- Capacity constraints analysis – where are the bottlenecks limiting growth?
- Quadrant analysis – is the owner spending too much time in Quadrant A (Important & Urgent activities)?
- Business systemisation assessment – what processes need documenting/automating to reduce owner dependence
- Organisational structure evaluation – does it support the 'Finders, Minders, Grinders' framework?
- Financial indicators of business maturity (owner compensation structure, profit retention patterns)
- Key metrics and KPIs tailored to the business stage
- Strategic capital allocation recommendations to accelerate business improvement

## Next Steps

By working through these areas, we can deliver a clear picture of your business health and provide actionable recommendations.

**Contact us to arrange a consultation.** Let's turn financial insights into strategies for sustainable growth and business mastery.