

Business Diagnostic Questionnaire

Print this, fill it in, or forward it to your team. Return answers at tylermcgregory.com/readers.html#questionnaire

SECTION 1

Can you organize my business?

1.1 What currently feels most disorganized?

1.2 Where does information get lost?

1.3 Which process causes daily confusion?

SECTION 2

Can you connect our systems?

2.1 Which tools are you using?

2.2 Where is information duplicated manually?

2.3 Which systems need better communication?

SECTION 3

Can you track customer activity?

3.1 Where are customer conversations stored?

3.2 Which customer actions matter most?

3.3 What activity remains completely invisible?

SECTION 4

Can you improve team follow-up?

4.1 How quickly does follow-up happen?

4.2 Who owns each customer conversation?

4.3 Where are opportunities getting missed?

SECTION 5

Can you build custom software?

5.1 What should the software manage?

5.2 Which process needs custom functionality?

5.3 Who will use it daily?

SECTION 6

Where is my business leaking?

6.1 Where are leads being lost?

6.2 Which delays are costing money?

6.3 What gets repeatedly overlooked internally?

SECTION 7

What should my business automate?

7.1 Which tasks repeat every day?

7.2 What still requires manual entry?

7.3 Which process causes unnecessary delays?

SECTION 8

Can I manage everything centrally?

8.1 What requires constant checking today?

8.2 Which dashboards do managers need?

8.3 What should trigger automatic alerts?

SECTION 9

Can you improve departmental communication?

9.1 Which departments struggle communicating consistently?

9.2 Where do handoffs usually break?

9.3 What information needs automatic sharing?

SECTION 10

Which numbers should we track?

10.1 Which outcomes matter most financially?

10.2 What decisions need better data?

10.3 Which performance metrics remain unclear?
