

IS YOUR BUSINESS ORGANIZED ENOUGH FOR THE NEXT VERSION OF ITSELF?

A simple self-check for small business owners who are growing, shifting, or tired of carrying everything in their head.

This is for clarity, not perfection.

Use this worksheet to identify where your business may need more structure before the next version of your business asks for it.

Name (optional): _____

Business Name (optional): _____

Date: _____

A QUICK NOTE BEFORE YOU START

Your business does not have to be perfect to be successful.

A lot of small businesses start with hustle, memory, quick decisions, text messages, notebooks, apps, folders, and "I know where that is."

That can work for a while.

But when the business starts growing, hiring, getting busier, serving more customers, or preparing for the next level, the structure behind the business has to grow too.

This worksheet is designed to help you look at the people, paperwork, processes, platforms, and priorities behind your business.

The goal is to see what needs more structure, what needs a plan, and what can wait.

This is for clarity, not perfection.

HOW TO USE THIS WORKSHEET

For each statement, rate your business from 1 to 5.

1	2	3	4	5
Not organized at all	Somewhat unclear	Getting by, but inconsistent	Mostly organized	Clear, consistent, and easy to find

Be honest. This is for clarity, not perfection.

SECTION 1: PEOPLE

This section looks at the people connected to your business, including employees, contractors, helpers, team members, or anyone who supports the work.

If you do not currently have employees, contractors, or helpers, answer based on whether you would have a clear process ready for the next person you bring into the business.

Rate each statement from 1 to 5.

Statement	Rating (1-5)
I know who is currently working with or for the business.	___
I know whether each worker is treated as an employee, contractor, helper, or another role.	___
I have basic contact information for each worker in one place.	___
I have onboarding or starting paperwork organized for workers.	___
I know what documents are missing, incomplete, outdated, or scattered.	___
If someone asked for worker records, I would know where to find them.	___
If I had to bring on a new worker tomorrow, I have a basic process to follow.	___

People Score

___ / 35

Quick Reflection

What feels most unclear about the people side of the business?

SECTION 2: PAPERWORK

This section looks at business records, employee files, onboarding forms, insurance, payroll records, service records, customer documents, and other important paperwork.

Rate each statement from 1 to 5.

Statement	Rating (1-5)
Important business documents are stored in one clear place.	_____
Employee or worker records are organized and easy to locate.	_____
Onboarding documents are complete and stored consistently.	_____
Insurance, banking, payroll, and formation documents are easy to find.	_____
Customer or client records, if applicable, are organized and current.	_____
I know which documents need to be reviewed, updated, or cleaned up.	_____
I am not relying on text messages, screenshots, memory, or random folders to find key information.	_____

Paperwork Score

_____ / 35

Quick Reflection

What paperwork or records would be stressful to locate quickly?

SECTION 3: PROCESSES

This section looks at how work actually moves through the business: onboarding, scheduling, billing, payment tracking, service completion, customer follow-up, file updates, and handoffs.

Rate each statement from 1 to 5.

Statement	Rating (1-5)
I have a clear process for bringing on new workers or helpers.	_____
I have a clear process for tracking customer or client information.	_____
I have a clear process for knowing when work has been completed.	_____
I have a clear process for billing or invoicing when needed.	_____
I have a clear process for tracking payments.	_____
I have a clear process for following up on unpaid balances or missing information.	_____
Someone else could follow the basic process if I was unavailable.	_____

Processes Score

_____ / 35

Quick Reflection

What process currently depends too much on memory or verbal updates?

SECTION 4: PLATFORMS

This section looks at the tools, apps, systems, software, calendars, drives, spreadsheets, or platforms used to run the business.

Rate each statement from 1 to 5.

Statement	Rating (1-5)
I know which systems or tools the business uses.	___
Each system has a clear purpose.	___
Customer, worker, billing, and business information are not scattered across too many places.	___
I know which system should be the main source of truth.	___
Business files are stored in a secure and organized location.	___
I am not paying for tools I do not understand or use.	___
I know what needs to be set up, canceled, reviewed, or organized.	___

Platforms Score

___ / 35

Quick Reflection

Which tool, app, or system feels the most confusing or underused right now?

SECTION 5: PRIORITIES

This section looks at whether the business has a clear order of action.

Rate each statement from 1 to 5.

Statement	Rating (1-5)
I know what needs attention first.	___
I know what can wait.	___
I know what needs outside professional help, such as legal, tax, payroll, or accounting guidance.	___
I know what systems or setup decisions need to happen before spending more money.	___
I have a clear next-step plan for organizing the business.	___
I can separate urgent issues from future ideas.	___
I have a sense of what the next stage of the business requires.	___

Priorities Score

___ / 35

Quick Reflection

What feels most urgent right now?

What feels important, but not urgent?

What feels more like a future idea?

TOTAL SCORE

Add each section score below.

Section	Score
People Score	____ / 35
Paperwork Score	____ / 35
Processes Score	____ / 35
Platforms Score	____ / 35
Priorities Score	____ / 35

Total Score: ____ / 175

WHAT YOUR SCORE MAY MEAN

Use your score as a starting point, not a judgment. The goal is to understand what needs more structure before the next version of your business asks for it.

35-81: GETTING BY ON HUSTLE

Your business may be operating, but too much information may still be scattered, unclear, or living in someone's head. That does not mean the business is failing. It may mean the business is ready for more structure.

82-128: GROWING BUT SCATTERED

Your business has some structure, but there may be gaps in records, workflows, systems, or next-step planning. The next step is usually identifying what needs to be cleaned up first.

129-175: STRONG FOUNDATION, READY FOR THE NEXT LEVEL

Your business has a good foundation, but there may still be areas that need tightening before the next level of growth. This is a good time to review systems, document processes, and prepare for the next phase.

THE BIG QUESTION

Is your business organized enough for the next version of itself?

Check the statement that feels most true right now.

- Yes, but I know some areas still need cleanup.
- Somewhat, but too much still lives in my head.
- Not really. I know the business needs more structure.
- I am not sure, but I know I need help figuring out what comes first.

WHERE TO START

Choose your top 3 structure priorities.

- Organize employee or worker records
- Create a business file structure
- Review onboarding documents
- Review payroll, worker setup, or classification questions
- Clean up customer or client information
- Prepare for LLC, email, website, or setup decisions
- Review billing or payment tracking
- Create a simple workflow or SOP
- Decide what system should be the main source of truth
- Build a phased plan for the next version of the business

My Top 3 Priorities

1. _____
2. _____
3. _____

NEXT STEP

If you found yourself in one of the first two categories - Getting By on Hustle or Growing But Scattered - you are in the right place.

1120 Consulting Group, LLC helps small businesses organize their people, paperwork, processes, platforms, and priorities - before the next version of the business makes the gaps louder.

START WITH THE INTAKE FORM

Visit 1120grp.com. Tell us which areas felt most unclear. We will take it from there.

Contact: <https://1120grp.com/contact>

We do not do everything. We do not replace your attorney, accountant, payroll provider, or daily operations team.

We help you understand what is scattered, what needs structure, what should happen first, and what can wait.

Final Thought

You built the business. Now it may be time to build the structure behind it.

This worksheet is a general business organization self-assessment. It is not legal, tax, payroll, or regulatory advice.