
LIGHTHOUSE VA & AI

Comprehensive Business Growth & AI Readiness Audit

Audit First. Technology Second. Results Always.

PREPARED FOR

Business Name:

Primary Contact:

Date of Audit:

We Evaluate. We Communicate. We Deliberate. Then We Execute.

INTRODUCTION

Thank you for taking the Lighthouse VA & AI Business Audit.

This audit has been specifically designed to provide business owners with a complete picture of their business before making important decisions concerning growth, staffing, systems, technology, AI implementation, automation, marketing, or investment.

Our Objective

To identify facts, uncover opportunities, mitigate risks, and create a clear roadmap for sustainable business growth.

Please answer each question as honestly and accurately as possible.

SECTION 01 | BUSINESS PROFILE

Company Information

Business Name:

Industry:

Years in Business:

Number of Employees:

Annual Revenue:

Business Location(s):

Primary Contact:

Position:

Email:

Phone:

Website:

Business Overview

› Describe your business in one paragraph.

- › What products or services do you offer?
- › What makes your business different from competitors?
- › What are your biggest strengths?
- › What are your biggest challenges?

SECTION 02 | VISION, STRATEGY & OBJECTIVES

Strategic Direction

- › What are your business goals for the next 12 months?
- › What are your business goals for the next 3 years?
- › What is your long-term vision?
- › What growth targets have you established?
- › What obstacles are preventing growth?

Leadership Assessment — Rate yourself from 1 to 10

Area	Score (1–10)
Strategic Planning	
Leadership	
Communication	
Team Management	
Decision Making	
Change Management	

SECTION 03 | FINANCIAL HEALTH ASSESSMENT

Revenue

Annual Revenue (Last Financial Year):

Annual Revenue (Previous Year):

Monthly Revenue Average:

Revenue Target Next 12 Months:

Profitability

Gross Profit %:

Net Profit %:

EBITDA %:

Break-even Point:

Current Cash Reserves:

Financial Management — Rate your confidence from 1 to 10

Area	Score (1–10)
Cash Flow Management	
Budgeting	
Forecasting	
Financial Reporting	
Cost Control	
Profit Monitoring	

Key Questions

- › Are your financial statements up to date? **Yes / No**
- › Do you receive monthly management reports? **Yes / No**
- › Do you know your profit per customer? **Yes / No**
- › Do you know your customer acquisition cost? **Yes / No**
- › Do you know your lifetime customer value? **Yes / No**
- › Do you operate with a budget? **Yes / No**
- › Do you maintain a rolling cashflow forecast? **Yes / No**

Financial Risks — Select all that apply

- ☐ Cash Flow
- ☐ Rising Costs
- ☐ Revenue Growth
- ☐ Debt

- ☐ Staff Costs
- ☐ Pricing
- ☐ Profitability
- ☐ Other

SECTION 04 | SALES & BUSINESS DEVELOPMENT

Revenue Generation

- › How do you generate leads?
- › What are your primary sales channels?
- › What is your monthly lead volume?
- › What is your conversion rate?
- › What is your average sale value?
- › What is your sales target?

Sales Assessment — Rate from 1 to 10

Area	Score (1–10)
Lead Generation	
Sales Process	
CRM Usage	
Customer Follow-up	
Pipeline Visibility	
Sales Forecasting	

SECTION 05 | MARKETING EFFECTIVENESS

Current Marketing Channels — Select all that apply

- ☐ Website
- ☐ SEO
- ☐ Facebook
- ☐ LinkedIn
- ☐ Google Ads
- ☐ Email Marketing

- ☐ Video Marketing
- ☐ Referrals
- ☐ Networking
- ☐ Other

Marketing Assessment

- › What is your monthly marketing budget?
- › What is your ROI measurement process?
- › Which channel performs best?
- › Which channel performs worst?
- › What is your greatest marketing challenge?

SECTION 06 | OPERATIONS & PROCESS EFFICIENCY

Operational Performance

- › Describe your customer journey.
- › What operational challenges exist?
- › What processes consume the most time?
- › What processes cause frustration?
- › What tasks could be streamlined?

Operations Assessment — Rate from 1 to 10

Area	Score (1–10)
Productivity	
Process Efficiency	
Documentation	
Customer Service	
Workflow Management	
Reporting Systems	

SECTION 07 | PEOPLE, CULTURE & LEADERSHIP

Team Assessment

Current Staff Numbers:

Key Roles:

Vacant Roles:

Staff Turnover %:

Recruitment Challenges:

Team Performance — Rate from 1 to 10

Area	Score (1–10)
Staff Performance	
Accountability	
Communication	
Leadership	
Training	
Culture	

Key Questions

- › Do you have job descriptions? Yes / No
- › Do you have performance reviews? Yes / No
- › Do you have succession plans? Yes / No
- › Do you have training systems? Yes / No
- › Do you have KPIs? Yes / No

SECTION 08 | CUSTOMER EXPERIENCE & RETENTION

Customer Analysis

Number of Active Customers:

Retention Rate:

Referral Rate:

- › How do you measure customer satisfaction?

Customer Experience — Rate from 1 to 10

Area	Score (1–10)
Customer Experience	
Service Delivery	
Complaint Handling	
Communication	
Retention Strategy	

SECTION 09 | TECHNOLOGY & SYSTEMS REVIEW

Current Systems

CRM:

Accounting Software:

Marketing Platform:

Communication Platform:

Project Management System:

Other Software:

Technology Assessment — Rate from 1 to 10

Area	Score (1–10)
System Integration	
Data Accuracy	
Reporting Capability	
User Adoption	
Security	
Efficiency	

Key Questions

- › Are systems integrated? **Yes / No**
- › Are there duplicate processes? **Yes / No**
- › Are reports accurate? **Yes / No**
- › Are staff trained on systems? **Yes / No**
- › Are systems scalable? **Yes / No**

SECTION 10 | AI & AUTOMATION READINESS

AI Assessment

- › Have you implemented AI? **Yes / No**
 - › What AI tools are currently used?
-
- › What automations currently exist?
-
- › What repetitive tasks consume significant time?
-
- › What manual processes could be automated?
-

AI Readiness — Rate from 1 to 10

Area	Score (1–10)
AI Understanding	
Automation Readiness	
Data Quality	
System Integration	
Staff Readiness	
Leadership Commitment	

AI Opportunities — Select all that apply

- ☐ Customer Service
- ☐ Lead Generation
- ☐ Sales Automation
- ☐ Reporting
- ☐ Data Analysis
- ☐ Recruitment
- ☐ Marketing
- ☐ Finance
- ☐ Administration
- ☐ Training

☐ Workflow Automation

SECTION 11 | RISK, COMPLIANCE & BUSINESS CONTINUITY

Risk Assessment — Rate from 1 to 10

Area	Score (1–10)
Data Security	
Cyber Security	
Compliance	
Business Continuity	
Disaster Recovery	
Risk Management	

Key Questions

- › Do you have documented policies? **Yes / No**
- › Do you have cybersecurity measures in place? **Yes / No**
- › Are backups performed regularly? **Yes / No**
- › Do you have adequate insurance cover? **Yes / No**
- › Do you have a business continuity plan? **Yes / No**

SECTION 12 | BUSINESS GROWTH OPPORTUNITIES

Growth Potential — Where do your greatest opportunities exist?

- ☐ Sales Growth
- ☐ New Markets
- ☐ New Products or Services
- ☐ Partnerships
- ☐ Technology
- ☐ AI & Automation
- ☐ Staffing
- ☐ Process Improvement
- ☐ Customer Retention
- ☐ Pricing Strategy

- › What does success look like in 12 months?

LIGHTHOUSE VA & AI | SCORING MATRIX

Each section receives a score out of 100. Scores are calculated by your Lighthouse VA & AI consultant following audit completion.

Business Area	Score / 100
Strategy	
Financial Health	
Sales	
Marketing	
Operations	
People & Culture	
Customer Experience	
Technology	
AI Readiness	
Risk Management	

FINAL BUSINESS HEALTH SCORE

90 – 100	World Class Business
80 – 89	Strong Growth Potential
70 – 79	Good Business — Improvements Required
60 – 69	Significant Opportunities Exist
Below 60	Immediate Attention Required

SUCCESS DEVELOPMENT PLAN

Completed by Lighthouse VA & AI following your audit

Following completion of your audit, we will provide:

- › Executive Summary
- › Key Findings
- › Growth Opportunities
- › Financial Performance Review
- › AI & Automation Assessment
- › Risk Assessment
- › Recommended Actions
- › Priority Action Plan (30–60–90 Days)
- › Business Growth Roadmap
- › ROI Forecast

- › Lighthouse Success Development Plan (SDP)

THE PURPOSE OF THIS AUDIT

The purpose of this audit is not to sell you software, AI, automation, or Virtual Assistants.

The purpose is to provide clarity, identify opportunities, mitigate risks, and create a strategic roadmap for sustainable growth.

We Evaluate. We Communicate. We Deliberate. Then We Execute.

Audit First. Technology Second. Results Always.

This audit positions Lighthouse VA & AI as a business consultancy first and a technology partner second.

CLIENT ACKNOWLEDGMENT

I acknowledge that the information supplied is accurate to the best of my knowledge and consent to Lighthouse VA & AI using this Information solely for the purpose of conducting a business assessment and preparing recommendations.

Clients position-----

Clients Signature -----