

# WHOLE PIE HEALTH CHECK™

Your Business:
Date:

It's time to complete **The Whole PIE Health Check**. Remember to involve key team members in this process. Alternatively, you can complete it on your own, have key team members complete it on their own, and then compare responses.

## INSTRUCTIONS

This assessment gives you a practical snapshot of how your business is doing in five key areas. It's not a test. It's a pulse check to help you identify where to focus your time and energy next.

Rate each statement from **1 (needs work)** to **4 (nailed it)**.

**Be honest, not aspirational.**

### Section 1: Purpose

**1 2 3 4**

- |    |   |                       |                       |                       |                       |
|----|---|-----------------------|-----------------------|-----------------------|-----------------------|
| 1. | We have a clear mission and vision that guide why we do what we do and where we are headed.       | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 2. | We have a small set of core values that shape how we show up, work together, and serve customers. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 3. | Our mission, vision, and values are known, shared, and used, not just words on a wall.            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 4. | We know exactly who we serve best, and who we don't.  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 5. | We have a clear understanding of what makes us different from the competition.                    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

### Section 2: Planning

**1 2 3 4**

- |     |   |                       |                       |                       |                       |
|-----|---|-----------------------|-----------------------|-----------------------|-----------------------|
| 6.  | We have painted a vivid picture of what success looks like in three years.      | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 7.  | We have set measurable goals for the next 12 months.                            | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 8.  | We have a quarterly plan for the next 90 days.                                  | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 9.  | Every key initiative in our 90-day plan has one owner—no shared accountability. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 10. | Progress on our plans is reviewed regularly and taken seriously.                | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |



# Your Whole PIE Health Check (cont.)

<b>Section 3: Process</b>		<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
11.	We have identified the 3 to 7 core functions of our business (sales, operations, finance, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12.	We have written processes for each core function of the business.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
13.	Our processes are followed consistently, not just written down.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
14.	We have a regular rhythm of leadership meetings to review data and stay aligned.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
15.	We use a consistent method for solving problems and identifying opportunities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Section 4: People</b>		<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
16.	We have an org chart that clearly defines who's responsible for what.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
17.	One person (and one person only) has ownership of each core function of the business.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
18.	We hire intentionally, based on culture fit and role clarity.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
19.	Our team members are in the right seats, doing work they're good at and enjoy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
20.	We have regular conversations about performance, expectations, and growth.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Section 5: Performance</b>		<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>
21.	We track a small set of key numbers that tell us how the business is doing.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
22.	We use data to make decisions, not just gut instinct.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
23.	We carve out dedicated time to focus on what's most important, not just what's most urgent.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
24.	We revisit and adjust our goals quarterly and annually.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
25.	The business gives us a healthy return, in profit, impact, and enjoyment.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

# Scoring Your Whole PIE Health Check

Count how many 1s, 2s, 3s, and 4s you ticked, multiply across, and add them up for your total score out of 100. Your score gives you a snapshot of your business's overall health and highlights areas where you can focus your energy for growth.

		My Count	=	Total Score Count
1	x	<input type="text"/>	=	<input type="text"/>
2	x	<input type="text"/>	=	<input type="text"/>
3	x	<input type="text"/>	=	<input type="text"/>
4	x	<input type="text"/>	=	<input type="text"/>
<b>Total Score</b>				<input type="text"/>

## Score Guide:

### 80 - 100: HEALTHY & THRIVING

Congratulations! Your business is in excellent shape. You have clarity in your purpose, plans, processes, people, and performance. Keep reinforcing these strengths, and focus on stretching even further: innovation, optimization, and strategic growth can take you to the next level.

### 60 - 79: STRONG BUT ROOM TO GROW

You're doing a lot right, but there are areas that could use attention. Identify the sections where your scores were lower, and prioritize small, practical steps to strengthen them. With intentional effort, your business can move from strong to exceptional.

### 40 - 59: CAUTION — TIME TO REFOCUS

Your business has some foundations in place, but there are critical gaps that could hold you back. Look closely at the areas where scores are lowest. These are where improvements will have the biggest impact. Use this assessment as a roadmap to start building stronger habits, processes, and clarity.

### 25 - 39: NEEDS ATTENTION — ACTION REQUIRED

Your business is struggling in multiple areas. It's time for a focused, deliberate approach to get back on track. Consider bringing in trusted advisors, involving your team, and creating clear goals to start strengthening your purpose, planning, processes, people, and performance.

## Ready to Strengthen Your Business?

If this assessment revealed some gaps, or sparked ideas about what's possible, you don't have to tackle it alone. The Whole PIE System™ gives you a proven framework to build a business that's profitable, impactful, and enjoyable. You'll learn how to bring Purpose, Planning, Process, People, and Performance into alignment so your business runs smoothly and sustainably.

Dive deeper with **Getting the Whole PIE**, the companion book that walks you step-by-step through the system with real-world examples, tools, and insights. Together, they'll help you move from overwhelm to clarity, and from good to truly great.

