



Data Health Self-Assessment

Twelve questions to find out whether your business data is actually working for you.

Most small businesses already generate the data they need to run better. It sits in QuickBooks, a point-of-sale system, a scheduling app, a stack of invoices. The question is never whether the data exists. It is whether the data is captured cleanly, trusted, and used to make decisions. Answer these honestly and by yourself. Nobody is grading this, and the lowest-scoring questions are where the money is usually hiding.

HOW TO SCORE

Yes = 2 points · Sort of = 1 point · No = 0 points. Maximum score is 24. Tally your total on page two.

		YES	SORT OF	NO
A · WHAT YOU CAPTURE				
01	Can you pull a list of every job or sale from last month showing the date, what was sold, and what it cost you to deliver?	☐	☐	☐
02	Do you record where each new customer came from?	☐	☐	☐
03	Does your data live in a system you can export from, rather than on paper or in somebody's head?	☐	☐	☐
B · WHETHER YOU TRUST IT				
04	If two people in your business each reported last month's revenue, would the numbers match?	☐	☐	☐
05	Do you know your true cost per job or per unit, including labor, materials, and a share of overhead?	☐	☐	☐
06	When a number looks wrong, do you know exactly where to go to check it?	☐	☐	☐
C · WHETHER YOU ACT ON IT				
07	In the last 90 days, have you changed a price, a schedule, or a service because of something the numbers showed you?	☐	☐	☐
08	Do you know which service or product line earns the most profit, not just the most revenue?	☐	☐	☐
09	Do you know which specific jobs or customers lose you money?	☐	☐	☐
D · WHO OWNS IT				
10	If your bookkeeper or office manager left tomorrow, could you still get your numbers?	☐	☐	☐
11	Is your business data backed up somewhere outside the single system it lives in?	☐	☐	☐
12	Do you review your numbers on a set schedule, rather than only when something goes wrong?	☐	☐	☐

What your score means.

Your total

/ 24

READ YOUR RANGE

19–24 **Your data is working for you.**

Captured, trusted, and used. The next gains come from forecasting, customer segmentation, and deliberate pricing experiments rather than cleanup. You probably do not need an analyst right now. You need time and a standing review habit.

12–18 **Solid foundation, specific blind spots.**

You have the data and broadly trust it, but it is likely not telling you where margin is leaking. At this level the money usually hides in three places: service lines whose true profitability nobody has calculated, prices that have not kept pace with cost, and capacity that is never measured.

6–11 **The data exists but is not being used.**

The most common place to be, and the most expensive. You are making decisions on instinct while the answers sit inside systems you already pay for every month. Establishing trust in the numbers usually pays for itself within a quarter.

0–5 **Capture comes first.**

Analysis cannot help until there is something reliable to analyze. Do not hire anyone to build you a dashboard yet. Get transactions recorded consistently in one system, run this assessment again in 90 days, and you will be in a different conversation.

WHAT TO DO WITH THIS

- 01 **Circle your three lowest-scoring questions.** Whatever your total, those three are your starting point. A total score is a summary; the individual zeroes are the work.
- 02 **Fix capture before analysis.** A clean list of jobs with dates and real costs beats a beautiful dashboard built on guesses. Every time.
- 03 **Put one number on a schedule.** Pick the single metric that would actually change a decision, and look at it the same day every month. One reviewed number beats twenty ignored ones.
- 04 **Do not buy software to solve a process problem.** Most small businesses already own the tools they need. New software rarely fixes an unclear question.

If you want a second set of eyes on it.

A Data Health Check is a fixed-price review that turns the data you already have into a written list of findings, each with a dollar figure and a specific action attached. It starts with a free 30-minute call with no obligation, and if your score says you do not need it, I will tell you that instead of selling you something.

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