



OSHER CONSULTANCY & TRAVEL SERVICES

The 60-Minute Business Audit Handbook

THE 60-MINUTE BUSINESS AUDIT HANDBOOK

**A Practical Guide to Assessing Business Performance,
Identifying Operational Gaps, and Building Sustainable
Growth**

Prepared By: OSHER CONSULTANCY & TRAVEL SERVICES

*Helping Businesses Strengthen Systems, Improve Performance, and Achieve
Sustainable Growth*

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This handbook is intended for educational and business development purposes only. The information contained herein should not be construed as legal, financial, accounting, or regulatory advice.

Businesses are encouraged to seek independent professional guidance regarding their specific operational, compliance, and financial circumstances.

Disclaimer

The self-assessment contained within this handbook is intended to identify areas of potential improvement and operational risk.

Completion of this assessment does not guarantee business success nor substitute for professional consultation.

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WELCOME MESSAGE

Dear Business Owner,

Thank you for taking the time to complete the 60-Minute Business Audit.

Many businesses focus heavily on sales and revenue growth while overlooking critical operational systems that support sustainability. As organizations grow, undocumented processes, workflow inefficiencies, poor communication systems, and compliance gaps often emerge.

This handbook provides a practical framework for evaluating key components of your business and identifying opportunities for improvement.

By the end of this assessment, you will:

- Understand your operational strengths
- Identify hidden inefficiencies
- Recognize potential compliance and financial risks
- Prioritize strategic improvements
- Develop a practical action plan

We look forward to supporting your continued growth.

Warm Regards,
Osher Consultancy & Travel Services

UNDERSTANDING THE AUDIT FRAMEWORK

A strong business does not happen by accident; it is built through intentional systems, consistent processes, and clear operational structure. The Audit Framework is designed to help business owners quickly identify where their operations are strong, where gaps exist, and where immediate improvements can create measurable impact. It breaks your business down into four core pillars that influence daily performance, customer experience, and long-term sustainability.

This framework allows you to evaluate your business objectively, using the same lens a professional consultant would apply during a full operational review. Each pillar focuses on a critical area of your business that directly affects efficiency, profitability, and compliance. By understanding how these pillars work together, you gain clarity on the root causes of operational challenges; not just the symptoms.

The Audit Framework helps you:

- Recognize inefficiencies that may be costing time or revenue
- Assess whether your internal processes support consistent performance
- Identify risks related to compliance, documentation, or financial management
- Evaluate how customers experience your business at every touchpoint
- Determine where strategic improvements will create the greatest return

This structured approach ensures that every part of your business is examined with intention. When used consistently, the Audit Framework becomes a powerful tool for decision-making, growth planning, and operational alignment.

Below, you will find the four pillars of the Audit Framework, each representing a foundational area of your business. Reviewing them carefully will help you understand how your current operations function and where targeted improvements can strengthen your overall performance.

HOW TO USE THIS HANDBOOK

- 1) Set aside approximately 60 minutes.
- 2) Answer each question honestly.
- 3) Assign a score based on your current business practices.

Score	Meaning
0	Not Implemented
1	Partially Implemented
2	Mostly Implemented
3	Fully Implemented and Consistently Maintained

CUSTOMER EXPERIENCE ASSESSMENT

Why Customer Experience Matters

Businesses with strong customer experiences achieve higher retention rates, stronger referrals, and greater client satisfaction.

Self-Assessment Checklist

Assessment Question	Score
Customers receive consistent information from staff	
Client inquiries are answered promptly	
Service standards are documented	
Complaints are recorded and monitored	
Follow-up procedures are in place	
Client feedback is collected regularly	
Repeat customer issues are reviewed	
Customer satisfaction is measured	

Total Customer Experience Score

____ / 24

INTERNAL WORKFLOW ASSESSMENT

Why Workflow Matters

Strong workflows reduce errors, increase productivity, and improve accountability.

Self-Assessment Checklist

Assessment Question	Score
Staff clearly understand responsibilities	
Tasks are assigned effectively	
Project deadlines are consistently met	
Internal communications are efficient	
Work processes are standardized	
Employees work independently when appropriate	
Bottlenecks are identified quickly	
Key performance indicators are monitored	

Total Workflow Score

____ / 24

DOCUMENTATION & SYSTEMS ASSESSMENT

Operational Documentation Review

Documents Currently Available

Document	Yes	No
Standard Operating Procedures		
Employee Handbook		
Client Service Procedures		
Forms and Templates		
Compliance Policies		
Risk Management Procedures		
Data Management Procedures		

Systems Assessment

Assessment Question	Score
Documents are current	
Documents are easily accessible	
Employees utilize procedures consistently	
Documentation is reviewed regularly	

Total Documentation Score

_____ / 12

COMPLIANCE AND FINANCIAL ASSESSMENT

Business Risk and Compliance Review

Assessment Question	Score
Financial records are accurate	
Invoices are issued on time	
Expenses are routinely monitored	
Payroll processes are documented	
Regulatory obligations are understood	
Licenses and permits are current	
Contracts are maintained properly	
Business risks are reviewed periodically	

Total Compliance Score

____ / 24

BUSINESS AUDIT SCORECARD

Category	Maximum Score	Actual Score
Customer Experience	24	
Internal Workflow	24	
Documentation & Systems	12	
Compliance & Financial	24	
GRAND TOTAL	84	

RESULTS INTERPRETATION

70-84 Points

High-Performing Business

- Your organization demonstrates strong operational maturity.
 - Focus on continuous improvement and scalability.
-

50-69 Points

Moderate Operational Risk

Several areas require improvement to support growth and efficiency.
Recommended focus:

- Process consistency
 - Documentation improvement
 - Performance tracking
-

30-49 Points

Significant Operational Gaps

- Business performance is likely affected by process inefficiencies.
 - Immediate action is recommended.
-

Below 30 Points

Critical Risk Level

- Significant weaknesses exist that may impact sustainability, compliance, and profitability.
- A comprehensive business review is strongly recommended.

OPERATIONAL RISK ANALYSIS

Identify your top business challenges.

Priority	Challenge	Operational Impact	Risk Level
1			
2			
3			

90-DAY BUSINESS IMPROVEMENT PLAN

Month 1

- ☐ Identify critical operational gaps
 - ☐ Prioritize urgent issues
 - ☐ Assign responsibilities
 - ☐ Create improvement goals
-

Month 2

- ☐ Develop missing documentation
 - ☐ Standardize procedures
 - ☐ Implement accountability measures
 - ☐ Train staff
-

Month 3

- ☐ Monitor performance
- ☐ Measure improvements
- ☐ Conduct follow-up review
- ☐ Update systems

BUSINESS ACTION WORKSHEET

My Top Three Priority Improvements

Priority 1

Issue:

Action Required:

Completion Date:

Priority 2

Issue:

Action Required:

Completion Date:

Priority 3

Issue:

Action Required:

Completion Date:

ABOUT OSHER CONSULTANCY & TRAVEL SERVICES

Who We Are

Osher Consultancy & Travel Services provides strategic business solutions designed to help organizations strengthen operations, improve efficiency, and build sustainable growth.

Services

- Internal Business Audit and Growth Strategy
- Business Operations Training & Technology Integration
- Business Operations Manual Development
- Service Agreement Preparation
- Independent Contractor Agreement
- Premium Business Concierge Package

Our Mission

To equip startups and small businesses with the foundational legal, operational, and business development support they need to launch, grow and thrive.

READY TO TAKE THE NEXT STEP?

Completing this audit is your first step toward operational excellence.

If your results identified process gaps, documentation challenges, compliance concerns, or workflow inefficiencies, professional support could help transform findings into measurable results.

CONTACT US

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