

APEX ACADEMY

The Educational Division of Apex Ledger Group LLC

FREE RESOURCE LIBRARY

Resource 1 of 27 — Foundation Series

The Business Health Checklist

A calm, clear-eyed diagnostic for owners who want to see their business as it truly is.

Systems outperform heroic effort.

1. Resource Overview

Official Title	The Apex Business Health Checklist
Category	Foundation
Purpose	To give owners a fast, honest, whole-business diagnostic across five core systems — before they try to fix anything.
Learning Objective	By the end of this resource, the owner can identify which of the five core business systems is the true root cause of their current strain, rather than treating symptoms.
Intended Audience	Owners of established small-to-midsize businesses (\$250K–\$10M revenue) who feel busy but not in control.
Estimated Completion Time	20–30 minutes

2. Educational Introduction

Why a Health Checklist — and Not a To-Do List

Most business owners already have a to-do list. What they lack is a clear picture of the business as a whole system. A to-do list tells you what feels urgent today. A health checklist tells you where the business is actually strong, where it is quietly weakening, and where one issue is creating three others downstream.

The Apex Method treats every business as five interdependent systems: Cash Flow, Operations, Team, Sales & Customers, and Strategic Direction. When one system is out of balance, the owner usually feels it somewhere else entirely — a cash problem shows up as a hiring problem; a systems problem shows up as an owner who can never take a vacation.

This checklist is not designed to make you feel behind. It is designed to make the business visible. Clarity, not judgment, is the goal.

"Every business problem has a root cause. This checklist exists to help you find it before you spend money guessing."

How to Use This Resource

- Set aside 20–30 minutes without interruption — ideally at the start of a week or month, not the end.
- Work through each of the five sections in order. Answer honestly, not aspirationally.
- Resist the urge to fix anything while you're completing the checklist. This is a diagnostic step, not an action step.
- Circle back to any section where you checked fewer than half the items — that is where your root cause likely lives.

3. The Worksheet

For each statement, check the box only if it is consistently true today — not true in theory, and not true "most of the time."

Cash Flow

✓	Cash Flow	Notes
☐	I know my current cash position without opening my accounting software.	
☐	I can name my break-even revenue number from memory.	
☐	I have at least 4 weeks of operating expenses in reserve.	
☐	I review cash flow on a set weekly or monthly cadence — not only when something feels off.	
☐	I understand which products, services, or clients are actually profitable.	

Operations

✓	Operations	Notes
☐	My core processes are documented somewhere other than my head.	
☐	The business could operate for two weeks without me and not lose quality.	
☐	I know which three tasks eat the most time each week.	
☐	New team members can get up to speed without shadowing me personally.	
☐	I have a clear system for tracking what's in progress versus what's done.	

Team

✓	Team	Notes
☐	Everyone on my team knows what "good" looks like in their role.	
☐	I have regular one-on-ones or check-ins, not just reactive conversations.	
☐	I could describe each team member's top strength and top growth area.	
☐	Accountability conversations happen when needed, not avoided.	
☐	I'm not the only person who can make day-to-day decisions.	

Sales & Customers

✓	Sales & Customers	Notes
☐	I know where my last five customers came from.	
☐	I have a repeatable process for following up on leads.	
☐	I understand why customers choose me over alternatives.	
☐	I track a number that tells me if sales are trending up or down.	
☐	I'm not personally required to close every sale.	

Strategic Direction

✓	Strategic Direction	Notes
☐	I could state my business's top priority for this quarter in one sentence.	
☐	My team could state that same priority in roughly the same words.	
☐	I've said no to at least one opportunity this quarter that didn't fit the plan.	
☐	I review progress against goals on a set schedule.	
☐	I feel more in control of the business than I did six months ago.	

4. Reflection Prompts

Which section had the fewest checked boxes? What does that tell you about where the business's real friction lives?

Think of the last problem that felt urgent. Which of the five systems was the true root cause — even if it showed up somewhere else?

If you could only strengthen one system this quarter, which would create the most relief in the other four?

5. CEO Notes

Use this space freely — observations, numbers you want to track down, conversations you need to have.

6. Key Takeaways

- A healthy business is not a business without problems — it's a business where problems are visible early.
- Symptoms and root causes are often in different systems. Treat the system, not the symptom.
- Clarity is not a one-time event. Revisit this checklist quarterly to see what's shifted.
- The goal is not a perfect scorecard. The goal is an accurate one.

7. Suggested Layout (Canva)

Typography Hierarchy

- Display / Title: Serif (e.g., Canva's "Playfair Display" or "Freight Display") at 36–44pt, Navy #1B2A4A.
- Section Headings: Same serif family, 20–24pt, Gold #B08D57, with a thin gold rule beneath.
- Body Text: Clean sans-serif (e.g., "Inter" or "Work Sans"), 11–12pt, charcoal #2A2A2A, 1.4 line height.
- Labels / Meta text: Sans-serif, small caps or letter-spaced, Slate #5B6B7C.

Color & White Space

- Palette: Navy #1B2A4A (primary), Gold #B08D57 (accent), warm off-white #F4F1EC (panels), pure white background.
- Margins: minimum 0.85" on all sides — the brand reads as premium partly through restraint.
- Never fill more than ~65% of a page with content; let sections breathe.

Recurring Design Elements

- Cover page: centered wordmark, thin gold double rule, one grounding philosophy line.
- Checklist tables: navy header row, alternating white/off-white rows, gold open checkbox glyph (□).
- Callout boxes: off-white fill, thin gold left border, italic serif pull-quote text.
- Footer on every interior page: small Apex Academy wordmark + page number, Slate.
- Icons: single-weight line icons only (no filled/glossy icons) — reinforces "calm, minimalist."

8. Printing Recommendations

- US Letter, portrait, 1-sided is fine for the worksheet pages; recommend 2-sided for the cover/intro pair to save paper.
- Matte or uncoated stock (80–100lb text) keeps the checkbox glyphs pen-friendly and reduces glare.
- If binding a full workbook later, a discreet gold foil accent on the cover reinforces the premium positioning at low cost.
- Digital-first users: export a fillable PDF version with checkbox form fields for the same file.

9. Where This Fits in Apex Academy

Belongs In	Foundation track — the first resource most new members complete.
Expands Into (Paid Workbook)	The Root Cause Diagnostic Workbook — a deeper, guided version with scoring and a 90-day remediation plan.
Complementary Workshop	"Finding the Real Problem" — a live 60-minute session on separating symptoms from root causes.
Supports Future Certification	Apex Certified Business Operator — Module 1: Business Systems Fluency.

The checklist stands on its own. Nothing above needs to be sold — it simply shows where the path continues for owners who want to go further.