

Mid-Year Business Performance Review

Is your business on track for the
second half of the year?

A practical 15-minute review to help you finish the
year stronger.

BUSINESS TOOLKIT
Volume 1



Before you start

July is the perfect time to pause.

The first half of the year has given you valuable insight into what's working, what's changed and where new opportunities may exist.

Before the busy autumn period begins, spend 15 minutes answering the questions in this workbook.

Sometimes one honest answer can change the direction of the next six months.



Six Questions Worth Asking



How has the business performed compared with our expectations?



What are we most proud of this year?



What hasn't worked as well as we'd hoped?



How has our market changed?



What are our competitors doing well?



If we could change just one thing before the end of the year, what would make the biggest difference?



Businesses don't grow by just working harder. They grow by making better decisions.



Business performance

Revenue



Are you on track to achieve your revenue target? If not, what's driving the gap?

Client wins



Have you attracted the clients that best support your long-term growth?

Biggest win so far this year?

Growth



Which services, sectors or regions have shown the strongest growth, and where are your biggest opportunities?

Biggest Challenge



What's the biggest barrier to achieving your goals?



Client **relationships**

Relationship Review

- ☐ Have we strengthened our relationships with our key clients this year?
- ☐ Which client relationships have become stronger? Have any relationships drifted?

Communication

- ☐ Have we communicated consistently with clients throughout the year?
- ☐ Has our communication provided value, not just updates?

Feedback

- ☐ What feedback have clients given us over the past six months?
- ☐ Have we acted on that feedback? What have we changed as a result?

Added Value

- ☐ What have we done this year that clients weren't expecting?
- ☐ Have we proactively shared ideas, insights or recommendations?

Looking **Ahead**

Opportunities

Which existing clients have the greatest potential for future growth?

Have we identified opportunities to support clients in different ways?

Is there anything we can do differently over the next six months?

Reflections

Looking back over the last six months, what's the biggest lesson you've learned about your client relationships?



Business development

How effectively have you turned opportunities into growth? Winning new business isn't just about generating leads. It's about creating the right opportunities, converting them effectively and building relationships that last.

Pipeline & Conversion

- ☐ How many new clients have you won in the past six months?
- ☐ How many quality opportunities didn't convert, and why?

Winning New Business

- ☐ Which source of new business has delivered your best clients?
- ☐ How do you measure the success of each activity?

Nurturing Prospects

- ☐ How are you staying visible to prospects who aren't ready to buy today?
- ☐ Are you sharing useful insight and expertise that keeps you front of mind?
- ☐ Is there a healthy balance between promoting your services and adding value?

New Client Experience

First Impressions

How did implementation go for your new clients?

Did you deliver the experience they expected?

What could you improve to increase referrals and repeat business?

Reflections

If you wanted to double the number of new clients over the next six months, where would your biggest opportunity come from?

Marketing & Branding

Does your marketing reflect the quality of your business?

Your marketing should do more than generate awareness. It should build confidence, demonstrate expertise and make it easy for prospects to choose you.

Credibility

- ☐ If a prospect visited your website or LinkedIn page, would they have a reason to get in touch?
- ☐ Does your marketing clearly communicate what makes your business different?
- ☐ Are you demonstrating your expertise through insight, advice and real examples?

Consistency

- ☐ Is your messaging consistent across your website, social media and other marketing?
- ☐ Does marketing support your wider business goals?
- ☐ Are you measuring what's working and adapting accordingly?

Proof

- ☐ Are you making the most of testimonials, case studies and client success stories?
- ☐ Does your marketing show the results you deliver, not just the services you offer?
- ☐ What evidence could you add to build greater trust?

Brand Impression

If you were seeing your business for the first time today, what impression would your marketing create?

Good marketing doesn't just attract attention. It gives people confidence to take the next step.



Looking ahead

Based on everything you've reflected on in this review...
What are the **THREE** priorities that will make the biggest difference over the next six months?

1

2

3

What's the one decision you've been putting off that could have the biggest impact?

Six Months From Now...

What would success look like for your business?

Would you like **a second opinion?**

I'd be happy to spend 30 minutes reviewing your answers and sharing a few ideas. No sales pitch. Just an honest conversation.

Claire Doherty
Credo Marketing



Call 07392 298787



Email claire@credo-marketing.com



Learn more about Credo www.credo-marketing.com



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