

Profitability Audit Checklist for SMEs

Track & Improve Your Business Profits

Use this **printable checklist** to review key areas of your business, track profitability, and make data-driven improvements. Print it out and use it regularly to stay on top of your business finances.

 **Business Name:** _____

 **Date:** _____

 **Reviewed by:** _____

Revenue & Pricing Review

- Are all products/services priced based on **profit margins**, not just competition?
- Have you reviewed **Customer Acquisition Cost (CAC) vs. Lifetime Value (LTV)**?
- Have you adjusted pricing in the last **6-12 months** based on demand and costs?
- Are discounts affecting your profitability? If yes, what needs adjustment? **Write here:**

 **Action Notes:** _____

Expense & Cost Control

- Have you **reviewed fixed expenses (rent, software, salaries) in the last 6 months**?
- Are there any **unused subscriptions or tools** that should be canceled?
- Have you renegotiated contracts with vendors for **better pricing**?
- Can you **automate** any manual processes to reduce labor costs?

 **Cost-Saving Ideas:** _____

Marketing & Sales Optimization

- Are you tracking **Return on Investment (ROI)** for every marketing campaign?
- Are your top marketing channels bringing in **profitable customers**?
- Do you know your **Cost Per Lead (CPL) & Conversion Rate (CR)**?
- Are there marketing activities that **should be reduced or eliminated**?

 **Adjustments to Make:** _____

4 Cash Flow & Profitability Management

- Do you have a **cash flow forecast** for the next **6 months**?
- Are **invoices paid on time**, or are you facing late payments?
- Do you have at least **3-6 months of cash reserves** for emergencies?
- Have you optimized vendor payment terms to improve cash flow?

 **Next Steps for Cash Flow:** _____

5 Business Growth & Scalability

- Do you have a **12-month growth plan** with clear targets?
- Are you reinvesting in **high-profit areas**, not just expanding revenue?
- Are you tracking **monthly profit margins & making data-driven decisions**?
- Have you delegated or automated tasks to improve efficiency?

 **Growth Priorities:** _____

Final Action: Track Your Business Performance Regularly

Use this checklist monthly to **identify profit leaks and growth opportunities**. If you need deeper insights, take the **Business Score Assessment** to get a **personalized strategy**.

 [Take the Business Score Assessment Now →](#)

 **Company Logo & Branding Here**