

FREE RESOURCE · TIVOLTA GROWTH PARTNERS

The SMB Growth Audit Checklist

45 diagnostic questions that reveal exactly where your business is leaking revenue — and what to fix first.

5

Growth Sections

45

Diagnostic Questions

60

Min to Complete

BEFORE YOU BEGIN

How to Use This Checklist

This audit covers the five growth levers that determine whether an SMB scales predictably or stays stuck. Be brutally honest — the point is to find the gaps, not confirm what's working.



Check the box

If you can answer YES with confidence and have data to back it up.



Leave it blank

If it's a NO, a "sort of," or you don't actually know the answer.



Mark your priorities

Star the 3–5 blank items that would have the biggest revenue impact if fixed.



Score each section

Count your checkmarks per section. Under 50%? That section is your priority.

SCORING GUIDE

0–40% · Urgent gaps

41–70% · Optimization needed

71–100% · Strong foundation



SECTION 1 OF 5

Website & Digital Presence

SCORE

— / 9

- ☐ My homepage clearly states who I help and what outcome I deliver — within 5 seconds of landing.
- ☐ There is a single, prominent call-to-action above the fold.
- ☐ My site loads in under 3 seconds on mobile.
- ☐ I know my site's current conversion rate (visitors → leads).
- ☐ Social proof (testimonials, logos, case studies) appears without scrolling far.
- ☐ My site ranks on page 1 for at least 3 high-intent keywords relevant to my offer.
- ☐ I have Google Analytics (or equivalent) with goal tracking enabled.
- ☐ My pricing page or offer page answers the top 3 objections buyers have.
- ☐ I have a dedicated landing page for my primary service or product.



Tivolta Benchmark: Most SMB sites convert 1–2% of visitors. A well-optimized site converts 4–8%. If you don't know your number, that's the first gap.



SECTION 2 OF 5

Lead Generation

SCORE
__ / 9

- ☐ I have a documented lead generation strategy (not just "referrals and hope").
- ☐ I know my monthly lead volume and where each lead comes from.
- ☐ I have at least one content asset (guide, checklist, webinar) that generates leads passively.
- ☐ My ad spend (if any) has a documented cost-per-lead target and I hit it consistently.
- ☐ I have a referral or partner program that generates at least 10% of new leads.
- ☐ My email list has at least 1,000 opted-in subscribers relevant to my offer.
- ☐ I publish content consistently (weekly minimum) on at least one channel.
- ☐ I track lead quality, not just lead volume.
- ☐ I can generate 30+ qualified leads per month without increasing ad spend.



SECTION 3 OF 5

Conversion & Sales

SCORE
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- ☐ I know my lead-to-close rate and it's above 20%.
- ☐ I have a documented sales process — not just "take a call and send a proposal."
- ☐ Prospects receive follow-up within 5 minutes of submitting a lead form.
- ☐ I have a nurture sequence (email or SMS) for leads who don't close immediately.
- ☐ My proposal or offer document is compelling enough to close without a follow-up call.
- ☐ I track deal stages and know where most prospects drop off.
- ☐ I have a CRM (even a simple one) with every active lead and deal logged.
- ☐ I A/B test pricing, offers, or messaging at least quarterly.
- ☐ I have a defined upsell or expansion path for existing customers.



SECTION 4 OF 5

Retention & Revenue

SCORE

— / 9

- ☐ My customer churn rate is below 5% monthly (or below 15% annually).
- ☐ I know my customer lifetime value (LTV) and it's at least 3x my acquisition cost.
- ☐ I have a structured onboarding process that gets new customers to their first win quickly.
- ☐ I proactively ask for referrals from happy customers.
- ☐ I send a regular (at minimum monthly) value-add communication to my customer base.
- ☐ At least 30% of my new revenue comes from existing customers or referrals.
- ☐ I have identified my top 20% of customers and actively protect those relationships.
- ☐ I run quarterly business reviews or check-ins with active accounts.
- ☐ I have a win-back sequence for customers who have gone quiet or churned.



SECTION 5 OF 5

Growth Infrastructure

SCORE

— / 9

- ☐ I have a single dashboard where I can see revenue, leads, and conversion rate at a glance.
- ☐ My marketing and sales data is connected — I can trace revenue back to its source.
- ☐ I review growth metrics weekly, not just when something goes wrong.
- ☐ My marketing activities are documented and repeatable — they don't depend on any one person.
- ☐ I have a 90-day growth plan that is written down and actively tracked.
- ☐ I allocate at least 10% of revenue to growth and marketing activities.
- ☐ My team has clear ownership over each growth function (not "everyone does a little").
- ☐ I have tested and documented which channels drive the lowest cost-per-customer.
- ☐ I could hand this audit to a new hire and they'd know exactly what to work on first.

YOUR RESULTS

Add Up Your Score

Section 1
Website

__ / 9

Section 2
Lead Gen

__ / 9

Section 3
Conversion

__ / 9

Section 4
Retention

__ / 9

Section 5
Infrastructure

__ / 9

TOTAL SCORE

__ / 45

0-18

Critical gaps — act now

19-31

Solid base, needs
optimization

32-45

Strong — scale with
confidence

READY TO CLOSE THE GAPS?

Get a Free 30-Minute Growth Strategy Call

Bring your completed checklist and we'll build a prioritized action plan for the gaps that will move your revenue fastest. No pitch — just a clear plan you can execute with or without us.

tivolta.com/contact

No retainer. No lock-in. Results in 60 days.



TIVOLTA