

Firm Health Audit

Consulting & Professional Services

Document type: Financial model / analysis · Generated 13 Oct 2026

This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Get a firm health audit that diagnoses what is holding the firm back — checks and gaps across sales and pipeline, delivery and quality, utilisation and margin, people, and systems, plus a scorecard and priority fixes. Fill in your details below.

Purpose of this tool & output

Diagnose what is holding the firm back

How the output is used

Use the audit to diagnose what is holding the firm back across sales, delivery, finance and people.

Who should vet it

A firm principal/advisor, to validate the findings and priorities.

Important cautions

AI-generated audit; validate with your data.

Companion documents

- Consulting Practice Setup Guide
- Firm Operations SOP
- Resource Allocation Planner
- Knowledge Management System
- Quality Assurance Framework
- Firm Tools & Tech Stack Advisor

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.