



Where Is Your Profit Going?

A Family Business Profit Worksheet

Meridian Associates | Blessing Family Businesses Across Generations
(817) 594-0546 | AskMeridian.com

Find hidden opportunities in just a few minutes.

Every dollar your business earns has somewhere to go. Some of it becomes profit. Some of it fuels growth. Unfortunately, some of it just quietly disappears.

If this sounds familiar, you may be asking yourself:

- Sales are up... So why aren't profits?
- Why does cash still feel tight?
- Where should I focus first?

This worksheet will quickly reveal areas where profit may be leaking. In just a few minutes you'll:

- Identify where profit may be getting lost
- Discover opportunities to strengthen your bottom line
- Know where to focus your attention first

ACTION: Review each section and check the statements that are true for your business today

Money Coming In

Am I making the most of what I already have?

Check ALL the boxes that apply.

- ☐ We know which products or services generate our highest profit.
- ☐ We know which customers contribute the most to our profitability.
- ☐ We make pricing decisions intentionally, with both value and long-term strength in mind.
- ☐ We know which parts of our business create the greatest profit, not just the most activity.

Money Going Out

Am I spending intentionally?

Check ALL the boxes that apply.

- ☐ We regularly review expenses.
- ☐ We know what costs are becoming unnecessary.
- ☐ We know which expenses are truly investments in our future.
- ☐ We make spending decisions intentionally, with both today's needs and tomorrow's goals in mind.

Money Getting Stuck

Where's the bottleneck?

Check ALL the boxes that apply.

- ☐ We understand why cash sometimes feels tighter than expected.
- ☐ We know the cause(s) of our cash bottlenecks.
- ☐ We know what's slowing sales in the business.
- ☐ We are confident cash is flowing efficiently.

Money for Tomorrow

Are today's decisions building the business we want for future generations?

Check ALL the boxes that apply.

- ☐ I'm confident our financial decisions are strengthening our business for the future ahead.
- ☐ I have clarity on which investments generate the highest return during the next 3-5 years.
- ☐ We're focusing on the best future profit opportunities.
- ☐ We have clarity on where to focus next for the greatest long-term impact.

What Did You Notice?

Which area has **the fewest check marks**? This is where to focus first.

- ☐ Money Coming In
- ☐ Money Going Out
- ☐ Money Getting Stuck
- ☐ Money for Tomorrow

What financial question do you wish you had the answer to?

What would give you the greatest confidence about the financial future of your business?

Your Next Step

This worksheet points to where greater profit opportunities exist.

Meridian's **Profit Opportunity Analysis** will bring even more clarity to you. We do the work for you by digging into the numbers, identifying what is really happening, and show you which opportunities will make the greatest difference.

With our Profit Opportunity Analysis, you will:

- Gain clear visibility into where profit is being lost
- Identify the financial issues that are creating the greatest pressure or risks
- Uncover hidden opportunities that will strengthen your bottom line
- Know where to focus next for the greatest long-term impact

This worksheet has shown you where to look.

The Profit Opportunity Analysis gives you the answers.

Find Your Greatest Profit Opportunities →

AskMeridian.com/Profit-Opportunity-Analysis

To talk directly with a Family Business Expert about your unique situation, **call (817) 594-0546 or email Meridian@AskMeridian.com**.