

12 QUESTIONS | FOUR ESSENTIAL AREAS | 24 POSSIBLE POINTS

Financial Clarity Scorecard

How healthy is your financial process? Evaluate what is working, find the area that needs attention first, and choose a practical next step.

What you will receive

A printable assessment, section totals, score interpretation, and a focused action plan. You can also complete the interactive scorecard on our resource hub.

Review details	Your entry
Business	
Review period	
Prepared by	
Review date	

Use this as a repeatable working tool. Mark an item complete only when it has been reviewed and supported. Record the owner and due date for each open item. Mark genuinely inapplicable items N/A.

How to complete your scorecard

Answer based on what your business does today. Use the same review period throughout. This is a self-assessment, not an independent review of your books.

Score	Choose the answer that fits
0	Not in place
1	Sometimes or inconsistent
2	Yes and consistent

Work through all 12 statements

- ☐ Circle one score for every statement. A manual process can still be consistent and effective.
- ☐ Add each three-question section. Each section has a maximum of 6 points.
- ☐ Add all four section totals. The maximum overall score is 24.
- ☐ Identify every section tied for the lowest score. Choose a priority based on the effect on your business.
- ☐ Use the support level as a conversation starter. A total score is not an automatic package recommendation.

If every section scores 6

Your priority is maintaining consistency as the business changes. Revisit your assumptions, reporting needs, and responsibilities periodically.

Prefer an interactive assessment?

Take the interactive Financial Clarity Scorecard

Your financial foundation

0 = Not in place | 1 = Sometimes or inconsistent | 2 = Yes and consistent

A. Books and monthly close

Statement	Circle one
1. Books are closed every month on a consistent schedule.	0 1 2
2. Bank and credit card accounts are reconciled monthly.	0 1 2
3. The P&L and balance sheet are reviewed for accuracy each month.	0 1 2

Section total: _____ / 6

B. Cash flow and financial performance

Statement	Circle one
4. We understand our current cash position and near-term cash needs.	0 1 2
5. We review budget vs. actual, trends, or other performance comparisons.	0 1 2
6. We can explain the biggest revenue and expense changes each month.	0 1 2

Section total: _____ / 6

Your reporting and readiness

0 = Not in place | 1 = Sometimes or inconsistent | 2 = Yes and consistent

C. Reporting and leadership visibility

Statement	Circle one
7. Leadership receives concise financial reporting that is easy to understand.	0 1 2
8. We track the KPIs that matter most to our business consistently.	0 1 2
9. We can get the information we need without rebuilding multiple spreadsheets.	0 1 2

Section total: _____ / 6

D. Planning and financial readiness

Statement	Circle one
10. We use a forecast, budget, or forward-looking plan when making decisions.	0 1 2
11. We can estimate the financial impact of a major business decision before acting.	0 1 2
12. Financial deadlines, reporting responsibilities, and recurring obligations are organized.	0 1 2

Section total: _____ / 6

Add your scores

Your lowest-scoring section can matter more than the overall total. It shows where a practical improvement may help most.

Assessment area	Your score	Maximum
Books and monthly close		6
Cash flow and financial performance		6
Reporting and leadership visibility		6
Planning and financial readiness		6
TOTAL		24

Choose the first area to improve

Your first priority	Your response
Lowest-scoring section or tied sections	
Why this matters to the business	
One action to take this month	
Action owner and due date	

Use judgment alongside the score

Choose the issue with the greatest practical effect, such as unreconciled cash, uncertain loan balances, or a report leadership cannot use.

Understand your result

These ranges suggest a direction for discussion. Your business complexity, reporting needs, and weakest section should guide the final scope.

0-8 | Foundation Needs Attention

Start with complete books, reconciliations, supported balances, and a dependable monthly close. Closest support level: Clarity.

9-16 | Visibility Is Developing

Your bookkeeping foundation may be working, while cash flow, budget comparisons, or management reporting needs more structure. Closest support level: Growth.

17-24 | Leadership Ready

Your processes are more established. Consider forecasts, custom KPI dashboards, scenarios, and executive reporting if they match your decisions. Closest support level: Vision.

A strong total can still hide a weak section

For example, 18 total points with 0 in Books and monthly close means your bookkeeping foundation needs attention before deeper planning. All figures in this example are illustrative.

Compare Clarity, Growth and Vision

Greenkey Accounting Services does not provide payroll services, income-tax preparation or filing, or legal or tax advice. Services and deliverables are defined in your engagement.

Turn your score into a next step

Lowest-scoring area	A useful first action
Books and monthly close	Set a close calendar. Reconcile accounts, then review the Balance Sheet and loan support before the trailing P&L and General Ledger.
Cash flow and financial performance	Build a 30-to-90-day cash outlook and explain the biggest monthly performance changes.
Reporting and leadership visibility	Choose a few clearly defined KPIs and one concise leadership reporting view.
Planning and financial readiness	Update planning assumptions and assign responsibility for recurring financial deadlines.

Bring your result to a discovery call

Share your total, section scores, current systems, and the decision you need help making. We will discuss your priorities and which support level fits.

Schedule a Discovery Call

Compare Greenkey support levels

Explore the checklist collection

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