



RESOURCE SERIES
CLARITY TOOLS

Business & Executive Margin Audit



A practical self-assessment to help you evaluate where
your time, energy, and focus go—and where you can
create healthy margin for what matters most.

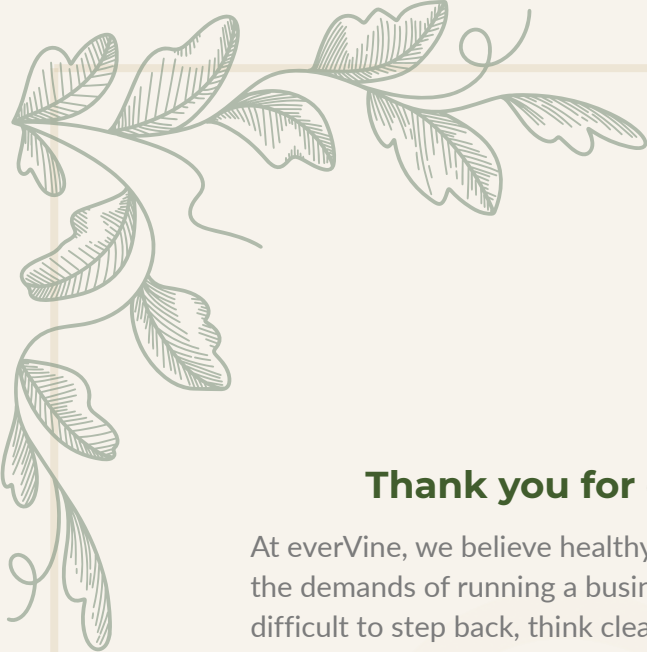
*Healthy margin isn't selfish.
It's stewardship.
It creates room for what matters most.*

everVine

Administrative & Operations Support for
Businesses & Executives
evrvine.com

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Thank you for downloading this Margin Audit.

At everVine, we believe healthy systems create margin for what matters most. When the demands of running a business begin to fill every available space, it can become difficult to step back, think clearly, and lead with intention.

This resource was created to help you take an honest look at where margin exists in your business and where it may be needed. As you work through the audit, consider your current rhythms, responsibilities, systems, and capacity—not where you think they should be, but where they are today.

Our hope is that this resource helps you recognize where margin already exists, identify where it may be needed, and take practical steps toward a healthier business rhythm.

Use this tool as a starting point for reflection, conversation, and intentional change. You do not have to change everything at once. Small, thoughtful changes can create meaningful room for what matters most.

Our Mission

To create healthy systems that bring clarity, organization, and margin—so business owners and executives can lead with intention and focus on what matters most.

About everVine

everVine provides administrative and operations support for businesses and executives who want greater clarity, stronger systems, and more margin for what matters most.

Through thoughtful organization, practical systems, and dependable support, everVine helps leaders create healthier ways to work—so they can spend less time managing the details and more time leading, growing, and focusing on the work only they can do.





Why Margin Matters



Business is about meaningful work, not constant productivity.

When every space on your calendar is filled and every request feels urgent, it becomes hard to lead with clarity, focus, and intention.

Margin is the breathing room that allows you to think clearly, make wise decisions, respond well to people, and be present for the work that matters most.

This audit will help you identify where your business may be overextended and where you can create healthy margin.

Healthy margin helps you:



Think strategically and make better decisions.



Develop and empower your team.



Respond well to people and unexpected needs.



Protect time for rest, renewal, and personal life.



Create space for growth, opportunity, and what matters most.



You do not have to do everything.

This is not about doing more.
It is about creating space for what matters most.
Let's take a look together.

CLARITY



SYSTEMS



HEALTHY GROWTH

Your Business & Executive Margin Audit



Read each statement and honestly assess how often it is true in your business right now. There are no right or wrong answers. Just clarity. Choose the option that best reflects your experience.

1

Rarely

(Almost never true)

2

Sometimes

(Occasionally true)

3

Often

(Frequently true)

4

Always

(Consistently true)



CALENDAR MARGIN

My calendar has room for focused, strategic work.

I protect time for priorities—not just urgent tasks.

I have margin for unexpected needs and opportunities.

1	2	3	4
1	2	3	4
1	2	3	4



COMMUNICATION MARGIN

My communication systems are organized and manageable.

I am not constantly interrupted or pulled in multiple directions.

I communicate proactively instead of just responding.

1	2	3	4
1	2	3	4
1	2	3	4



DECISION-MAKING MARGIN

I have time and space to think through decisions.

I make confident decisions without feeling rushed.

I am not stuck in small decisions that drain my energy.

1	2	3	4
1	2	3	4
1	2	3	4



TEAM & DELEGATION MARGIN

I delegate responsibilities that others can own.

My team knows what is expected and has what they need.

I am not carrying more than I should.

1	2	3	4
1	2	3	4
1	2	3	4



ADMINISTRATIVE & SYSTEMS MARGIN

My systems and processes support how I want to work.

I spend my time on high-impact work, not busywork.

I have systems in place that save time and reduce stress.

1	2	3	4
1	2	3	4
1	2	3	4



LEADERSHIP MARGIN

I have margin to lead with vision, strategy, and purpose.

I invest in growth—for myself and my business.

I am focusing on the work only I can do.

1	2	3	4
1	2	3	4
1	2	3	4



Take your time and be honest.

This is not about perfection. It is about creating awareness so you can build a business with more clarity and margin.

CLARITY

SYSTEMS

HEALTHY GROWTH



Creating Margin: Your 30-Day Plan



You don't have to fix everything at once. Small, intentional changes create lasting margin.
Use your audit results to choose actions that will make the biggest impact right now.

Focus on progress, not perfection.



STOP

What no longer needs to be done, or what can be let go?

What will I stop doing or saying yes to?



SIMPLIFY

What could be made easier, shorter, or less complicated?

What can I simplify this month?



SYSTEMIZE

What recurring work needs a better process or structure?

What process or system will create more ease?



DELEGATE

What could someone else own or take off your plate?

What can I delegate or release to someone else?



PROTECT

What margin, time, or commitments need to be protected?

What will I protect and guard this month?



MY FIRST STEP

One small change can create a big shift over time.

The one margin-building change I will make this week is:

I will take this step by (date): _____

Healthy margin is not selfish. It is stewardship. It creates room for what matters most.

CLARITY



SYSTEMS



HEALTHY GROWTH



Ready to Talk?

Whether you are exploring your options or ready to move forward, we would be honored to help you find the right solution for your business.

Schedule a complimentary Discovery Conversation



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Healthy systems do more than organize the work. They create room to lead it well.

Explore More Business & Executive Resources:

everVine offers practical tools designed to help business owners and executives create healthier systems, strengthen operations, and make room for the work and priorities that matter most.

Leadership & Decision-Making

Tools to bring clarity to priorities, responsibilities, and next steps

Planning & Healthy Rhythms

Practical support for creating sustainable work and leadership rhythms

Delegation & Team Support

Resources to help leaders share responsibility, strengthen ownership, and empower their teams

Operations & Organization

Tools for creating stronger systems, smoother workflows, and greater day-to-day clarity

Explore the Business & Executive Resource Collection

evrvine.com/business-executive-support

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