



# CEO AUDIT CHECKLIST: IS YOUR BUSINESS READY TO SCALE?

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Use this self-assessment to identify the gaps in your backend operations and determine if your business is set up to grow without the grind.

### 1. Strategic Foundation 🌟

- ✅ I have a clear, documented vision and mission for my business
- 🎯 My core offers are clearly defined and consistently delivered
- 📅 I know my quarterly and annual goals, and track them regularly
- 🧠 I have a decision-making framework for evaluating new opportunities
- 🌍 My business runs from a strategic plan—not reaction.

### 2. Systems & Automations 🤖

- 🚀 My client onboarding process is fully automated and consistent
- 📁 I use a project management system (ClickUp, Asana, Trello, etc.)
- 📄 Recurring tasks are documented or templated for my team
- 💡 My sales funnel is partially or fully automated
- 📊 I use a CRM or lead tracking system to manage prospects

### 3. SOPs & Documentation 📝

- 📖 My core business functions are documented in SOPs
- 🤝 New team members can be onboarded with minimal hand-holding
- 💻 I have a central Ops Hub or CEO Dashboard to manage everything
- 🌴 My business can run without me for at least 1–2 weeks
- 🔄 I've documented workflows for client delivery, marketing, and finance

#### 4. Team & Delegation 👤

- 👥 I have a team (contract or employee) that handles daily operations
- 📌 Everyone on my team has clear roles, KPIs, and workflows
- ❌ I am not the bottleneck in my business
- 📅 I conduct regular team check-ins or reviews
- 💼 I have support with admin, tech, or marketing so I can stay CEO

#### 5. Financial Oversight 💰

- ✅ I review my monthly income, expenses, and cash flow
- 📊 I know my profit margins and cost of delivery for each offer
- 📅 I use a bookkeeper or financial tool to keep records updated
- 📈 I have a budget or forecast for upcoming quarters
- 💵 I pay myself consistently and plan for taxes

#### 6. CEO Time & Leadership 👤

- 🕒 I spend 70–80% of my time on CEO-level tasks (strategy, growth, vision)
- 🌴 I take regular breaks or vacations without the business falling apart
- 🧑 I have a trusted advisor or support system (coach, COO, etc.)
- 📊 I make decisions based on data, not emotion
- 🧑 I feel in control—not overwhelmed—by my business

#### 📊 Score Yourself

- ✅ 25–30: Your business is built to scale—fine-tune and go!
- ✅ 15–24: You're in growth mode—let's optimize and systematize.
- ⚠️ < 15: Time for an operational overhaul. Let's rebuild your backend

 **NEXT STEP:**

 **BOOK A FREE 30-MINUTE SYSTEMS STRATEGY CALL**

**LET US HELP YOU MAP OUT YOUR NEXT STEPS AND SIMPLIFY YOUR SCALE-UP.**

 **SCHEDULE MY CALL**

